Morven North Offshore Wind Array Project

Environmental Impact Assessment Report

Volume 2, Chapter 17: Socio-Economics

MVCNS-J1201-RPS-10025
May 2026

B01

Document status

Version	Purpose of document	Authored by	Checker	Approved by	Date
FINAL	Application	TTRPSEL	TTRPSEL	MvOWL	May 2026

Prepared by:	Prepared for:
TTRPSEL	**Morven Offshore Wind Limited**

Table of contents

List of tables

List of figures

17 Socio-economics

17.1 Introduction

17.1.1.1 This chapter of the Morven North Offshore Wind Array Project (hereafter "Morven North") Environmental Impact Assessment (EIA) Report (hereafter, the EIA Report) presents the assessment of the likely significant effects (as per the EIA Regulations as defined in Volume 1, Chapter 2: Policy and Legislation) on socio-economics. Specifically, this chapter considers the potential impacts of Morven North seaward of Mean High Water Springs (MHWS) during the construction, Operations and Maintenance (O&M) and decommissioning phases. Where relevant, this chapter also assesses the likely significant effects of Morven North on receptors landward of MLWS during the construction, O&M and decommissioning phases.

17.1.1.2 The assessment presented in this chapter has relied upon, or informed the following technical chapters and chapters:

- Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report;
- Volume 2, Chapter 12: Commercial Fisheries;
- Volume 2, Chapter 13: Shipping and Navigation;
- Volume 2, Chapter 16: Other Sea Users and Communications;
- Volume 2, Chapter 20: Human Health.

17.1.1.3 Socio-economics was reported on in the Scoping Report for the Morven Option Lease Agreement Site (hereafter, "the Morven Site Scoping Report"). (Morven Offshore Wind Limited (MvOWL), 2023). As described in Volume 1, Chapter 4: Site Selection and Consideration of Alternatives, the Morven Option Lease Agreement Site (hereafter "Morven Site") has since been divided into two smaller projects, Morven North and Morven South Offshore Wind Array Project (hereafter "Morven South ").

17.1.1.4 The potential impacts to socio-economics are considered to generally be the same (or less) for Morven North as identified in the Morven Site Scoping Report. Consequently, there has been no change in the methodology or impacts that were scoped in or out in the Morven Site Scoping Report for socio-economics. The advice provided by the Marine Directorate Licensing Operations Team (MD-LOT) in the Morven Site Scoping Opinion (MD-LOT, 2023) relevant to Morven North, has therefore been considered for the development of this chapter.

17.1.1.5 This chapter presents and assesses up-to-date parameters for Morven North and explains if and how any assessment aspects differ from the information set out in the Morven Site Scoping Report.

17.2 Study areas

17.2.1 Scotland and the United Kingdom

17.2.1.1 JERA Nex bp Limited (JNBP), together with German partner EnBW Energie Baden-Württemberg AG (EnBW) (hereafter The Applicant), have developed a Supply Chain Development Statement (SCDS) (bp/EnBW, 2023) which outlines a set of cost assumptions for Morven North, with costs broken down between Scotland, the rest of the UK, the EU and elsewhere. The study areas defined for economic impact assessment undertaken within the socio-economic assessment align with those outlined in the SCDS, including:

- Scotland;
- United Kingdom (UK).

17.2.2 Local Socio-Economic Study Areas

17.2.2.1 In addition, it is expected that there will be epicentres of socio-economic impact at:

- The construction port (i.e. the area around the construction port (construction phase only));
- The O&M port, (i.e. the area around the O&M port (O&M phase only)).

17.2.2.2 If ports are used for decommissioning, they are likely to share similar characteristics to construction ports, but experience impacts of a smaller magnitude.

17.2.2.3 The Local Socio-Economic Study Areas are defined in line with the guidance on identification of 'local areas' for offshore developments published by the Scottish Government (Marine Directorate, 2022). 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 the 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;
- 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.

17.2.2.4 Based on the guidance, Local Socio-Economic Study Areas were identified to assess the impact of changes to Gross Value Added (GVA) and employment, as well as social impacts related to demographic changes.

17.2.2.5 While the ports to be used are yet to be decided, a list of potential port locations on the east coast of Scotland which could potentially be used for the construction and O&M phases has been considered to identify the Maximum Design Scenario (MDS). These are summarised in Table 17.1. This list is not exhaustive and other port locations may be chosen. It is possible that other port locations not included in the list may be selected for the construction and O&M phases. However, it is expected that whichever port is chosen will share similar characteristics to one of the port locations assessed and consequently experience similar impacts to the ones assessed in the EIA.

17.2.2.6 The Local Socio-Economic Study Areas have been defined based on where employees working at each port are expected to live, and where any change in GVA and employment is likely to take place. These construction port and O&M port Local Socio-Economic Study Areas are outlined in Table 17.1 and shown on maps in Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report.

Table 17.1: Local Socio-Economic Study Areas for potential construction and Operation and Maintenance ports

Ports	Construction/O&M Local Socio-Economic Study Areas	Port type
Aberdeen	Local authority of Aberdeen City and the following electoral wards: Banchory and Mid Deeside; East Garioch; Ellon and District; Inverurie and District; Mid Formartine; North Kincardine West Garioch; Westhill and District.	Construction, O&M
Ardersier	Electoral wards of: Culloden and Ardersier; Dingwall and Seaforth; Inverness Central; Inverness Millburn; Inverness Ness-side; Inverness South; Inverness West; Nairn and Cawdor.	Construction, O&M
Buckie	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; Turriff and District.	O&M
Burntisland	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; West Fife and Coastal Villages.	Construction, O&M
Cromarty Firth	Electoral wards of: Black Isle; Cromarty Firth; Dingwall and Seaforth; East Sutherland and Edderton; Inverness Central; Inverness Millburn; Inverness Ness-side; Inverness West; Tain and Easter Ross.	Construction
Dundee	Local authority of Dundee City and Angus and the following electoral wards: Carse of Gowrie; Strathmore.	Construction, O&M
Fraserburgh	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; Turriff and District.	O&M
Leith	Local authority of City of Edinburgh.	Construction
Macduff	Electoral wards of: Banff and District; Buckie; Central Buchan; Fochabers Lhanbryde; Fraserburgh and District; Huntly, Strathbogie and Howe of Alford; Keith and Cullen; Troup; Turriff and District.	O&M
Methil	Local authority of Fife.	Construction
Montrose	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; Montrose and District.	O&M
Nigg	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; Tain and Easter Ross.	Construction
Scapa Deep Water Quay	Local authority of the Orkney Islands.	Construction, O&M
Peterhead	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; Turriff and District.	O&M

Ports	Construction/O&M Local Socio-Economic Study Areas	Port type
Rosyth	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; West Fife and Coastal Villages.	Construction
Wick	Electoral Wards of: Thurso and Northwest Caithness; Wick and East Caithness.	O&M

17.3 Legislative and policy context

17.3.1.1 Policy and legislation on renewable energy infrastructure is presented in Volume 1, Chapter 2: Policy and Legislation. A summary of the policy provisions relevant to socio-economics is set out in Table 17.2. No legislative provisions have been summarised for the purposes of this Chapter.

Table 17.2: Summary of provisions within policy documents of relevance to socio-economics

Summary of relevant policy	How and where considered in the EIA report
The Clean Power 2030 Action Plan (Department of Energy Security and Net Zero, 2025) sets out the UK Government's plans to usher in a new era of clean electricity, with plans for 95% of power coming from clean sources by 2030. Offshore wind is seen as key to this goal, requiring 43GW to 50GW of offshore wind capacity, as well as investment across other types of renewables and grid infrastructure.	The investment required is expected to result in new industries and employment opportunities. Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.
The HM Government Plan for Change (UK Government, 2024) sets out the UK Government's priorities, including kickstarting economic growth and making Britian a clean energy superpower. which includes creating good low carbon jobs and reviving manufacturing	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2. Cumulative effects on manufacturing are considered in Section 17.13.
The Modern Industrial Strategy (UK Government, 2025a) provides a 10-year plan for benefitting from the changes to technology and the economy. As part of this, eight sectors have been identified, including Clean Power. For each sector, a Sector Plan has been created.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.
The Clean Energy Sector Plan (UK Government, 2025b) sets out how the UK Government will support the Clean Energy sector by providing stability to business, developing partnerships, and supporting frontier industries and clusters. As part of this, the Government is supporting the adoption of new technologies, with the potential develop domestic manufacturing and export high value goods to other countries deploying offshore wind.	Cumulative effects on manufacturing are considered in Section 17.13.

Summary of relevant policy	How and where considered in the EIA report
The UK Marine Policy Statement (HM Government, 2011) discusses the UK's approach to offshore wind, noting the potential for economic and social benefits, including the development of low carbon manufacturing capability.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2. Cumulative effects on manufacturing are considered in Section 17.13.
The National Strategy for Economic Transformation (Scottish Government, 2022) sets out Scotland's ambition to be a wellbeing economy, with five key aims. The strategy notes that Scotland has substantial energy potential and can play a role in supporting productive businesses and regions. A key longer-term challenge is regional inequality, with rural and island areas facing problems such as a declining labour supply and poorer access to infrastructure and housing.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2. Effects on labour supply, housing and other services are considered in Section 17.11.3
The National Performance Framework (Scottish Government, 2026) combines a range of well-being measures to give a more rounded view of economic performance and progress towards achieving sustainable and inclusive economic growth and well-being across Scotland. It includes 11 outcomes, including economy and fair work and business.	Economic impacts in Scotland and the UK are discussed in Section 17.11.2. as well as the types of jobs created.
National Planning Framework 4 (Scottish Government, 2023a) affirms the importance of the transition to a net zero economy, with wind energy contributing to green investment and green jobs. It states that renewable energy developments will be supported where they maximise net economic impact, including local and community socio-economic benefits, such as employment and supply chain opportunities.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.
The Draft Energy Strategy and Just Transition Plan (Scottish Government, 2023b) outlines the Scottish Government's vision for transition to net zero, while ensuring the process is fair workers and communities. A central pillar of the strategy is delivering a 'Just Transition' ensuring that the shift to a green economy creates widespread benefits, including employment in low carbon jobs.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.
The Offshore Wind Policy Statement (Scottish Government, 2020) sets out the Scottish Government's support for offshore wind, with the potential for substantial economic impacts. A subsequent update (Scottish Government, 2026) has reset Scotland's ambition to have up to 40GW of offshore wind capacity by 2040, noting the key strategic benefits of economic growth and a just transition.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.
Scotland's National Marine Plan (Scottish Government, 2015) is the overarching guidance for planning and consenting offshore wind farms in Scotland. It includes an objective of maximising economic benefits from offshore wind through a competitive Scottish supply chain. In addition, development which provides social benefits is encouraged.	Employment and GVA impacts in Scotland and the UK are discussed in Section 17.11.2.

Summary of relevant policy	How and where considered in the EIA report
The Sectoral Marine Plan for Offshore Wind Energy (Scottish Government, 2020) sets out the Scottish Government's plans for offshore wind. A key goal is to maximise opportunities for economic development. investment and employment in Scotland, while minimising potential adverse effects on other economic sectors. An updated Sectoral Marine Plan for Offshore Wind (Scottish Government, 2025b) highlights the potential of offshore wind for growing the economy, one of the Scottish Government's priorities. The draft plan also notes potential impacts on fishing, tourism and recreation and shipping. Wider social impacts are difficult to quantify.	Economic impacts in Scotland and the UK, including those on other sectors, are discussed in Section 17.11.2. Potential social impacts are also considered in Section 17.11.2. Impacts on commercial fishing, tourism and shipping are considered in Section 17.11.2.

17.4 Consultation

17.4.1.1 The approach to consultation for Morven North is set out in Volume 1, Chapter 5: Consultation. A summary of the issues raised during consultation activities undertaken to date specific to socio-economics is presented in Table 17.3, together with how these issues have been considered in the production of this socio-economics EIA Report chapter. Further detail is presented within Volume 3, Annex 5.1: Consultation.

Table 17.3: Summary of key consultation issues raised during consultation activities undertaken for Morven North of relevance to socio-economics

Date	Consultee and type of consultation	Summary of issue(s) raised	Applicant's response to issue raised and, if applicable, where considered in this chapter
09 August 2023	Forth Ports: Scoping response	A full evaluation of the employment and Gross Value-Added impacts associated with the construction phase of Morven North would be better assessed with the inclusion of the City of Dundee and the Port of Dundee.	As the ports selected are not known, a wide range of ports, including Dundee, has been considered as part of the socio-economics assessment, and these are discussed in Section 17.11.
		Forth Ports would request to be part of the consultation for the City of Edinburgh and City of Dundee.	Since issue of the Morven Site Scoping Report, the Applicant has decided on a broader ports strategy and is considering a range of ports. As such, no stakeholder consultations have been undertaken with specific ports.

Date	Consultee and type of consultation	Summary of issue(s) raised	Applicant's response to issue raised and, if applicable, where considered in this chapter
30 November 2023	MAU: Scoping response	Please use the most up-to-date data sources.	A baseline using the most up-to-date data sources is provided in Section 17.7. A summary of desktop reports used to characterise the socio-economic baseline is provided in Table 17.5.
		The current list of stakeholders is considered insufficient, and that consideration should be given to stakeholder mapping, including all the people, groups and stakeholders that may be affected by the development, including local communities, business, workers, other users of the sea, interest groups, community councils and so on. It is advised to conduct extensive stakeholder mapping and data collection of primary social data, particularly local communities. Consideration should be given to hiring a social researcher to design a qualitative primary research study.	Collection of primary data and stakeholder mapping was not possible as construction and O&M ports have not been selected. As a result, it was not possible to consult with the range of stakeholders suggested by the MAU. As stated in Table 17.19, a Community Engagement Plan will be implemented once construction and O&M ports have been selected. The Morven North socio-economic assessment presented in this chapter has been undertaken by a team of qualified researchers with extensive experience in economics and social research, including primary qualitative research, as detailed in Volume 1, Chapter 1: Introduction.
		The MAU expects to see methodologies that were used to conduct primary research with stakeholders in the EIA license application. This should include description of: how locations were chosen, sampling considerations, methods to collect data, how data was recorded, how data was analysed, how ethical considerations were addressed.	Collection of primary data was not possible as construction and O&M ports have not been selected.
		The MAU notes that "community identify, culture, resilience and influence" has been scoped out. Please scope in these impacts.	The MAU feedback on the scoping out of the determinant of health "community identify, culture, resilience and influence" is addressed within Volume 2, Chapter 20: Human Health and is not relevant to the socio-economic assessment.

Date	Consultee and type of consultation	Summary of issue(s) raised	Applicant's response to issue raised and, if applicable, where considered in this chapter
		The MAU notes that "Transport modes, access and connections" has been scoped out. The increased use of these transport modes could lead to an increase in traffic congestion, reduced road quality etc. which could be disruptive for local populations. Please scope in these impacts.	The MAU feedback on the scoping out of the determinant of health "Transport modes, access and connections" is addressed within Volume 2, Chapter 20: Human Health and is not relevant to the socio-economic assessment.
		We expect to see a detailed description of the methodology used to assess economic impacts in the EIA, including specific details about the methodological approach taken and any key assumptions that underpin any estimates	The methodology and detailed breakdown of economic impacts is provided in detail in Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report. An economic impact assessment is provided in Section 17.11.
		It is welcomed that the assessment will include direct, indirect and induced impacts and take account of deadweight, leakage, displacement and substitution. The inclusion of sensitivity analysis to account for risk, uncertainty and optimism bias is also welcomed	Deadweight, leakage, displacement and substitution have been considered in Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report. The assessment in Section 17.11 is based on the MDS, which will represent the lowest potential economic impact.
		The proposed approach to assess employment impacts in terms of years of employment and jobs seems appropriate. If it is possible to supply additional information about the types of jobs that are expected to be created (e.g. part-time, full-time, skilled) and how these compare to the existing jobs in the study areas, this will add further depth to the analysis.	A breakdown of employment by occupational type is discussed in Section 17.11.
		With regards to social impacts, the MAU disagrees with scoping out of socio-cultural impacts.	The construction and O&M ports have not been selected. Assessing potential socio-cultural impacts would require in-depth consultation with communities, which is not feasible given the number of potential port locations as provided in Table 17.1.

Date	Consultee and type of consultation	Summary of issue(s) raised	Applicant's response to issue raised and, if applicable, where considered in this chapter
		The MAU welcomes the identification of relevant local impact areas, including: • City of Edinburgh; • Aberdeen City, Aberdeenshire and Angus Council Areas; • the City of Glasgow.	Since issue of the Morven Site Scoping Report, the Applicant has decided on a broader ports strategy and no specific ports have been selected. Port-specific local study areas have not been identified. However, a list of potential port locations on the east coast of Scotland has been considered in order to identify the MDS as described in Section 17.2.
30 November 2023	MD-LOT: Scoping opinion	The Scottish Ministers are broadly content with the study areas, although advise consideration of the representation from Forth Ports should the Port of Dundee emerge as a relevant location	Since issue of the Morven Site Scoping Report, the Applicant has decided on a broader ports strategy and no specific ports have been selected. Port-specific local study areas have not been identified. However, a list of potential port locations on the east coast of Scotland has been considered in order to identify the MDS as described in Section 17.2.
		The Scottish Ministers advise (in line with MAU) that a full socio-economic impact assessment must be provided and should be transparent in its methodological choices for assessment.	The methodology and detailed breakdown of economic impacts is provided in detail in Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report. An economic impact assessment is provided in Section 17.11.
		The Scottish Ministers draw attention to Annex 1 of the MAU advice when developing the socio-economic impact assessment.	The MAU advice is considered within the relevant sections, including Section 17.7 and Section 17.11, as well as Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report.
		The Scottish Ministers advise that the most up to date data sources must be used for all analysis.	The most up-to-date data sources have been used in the assessment, including the baseline provided in Section 17.7 and Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report.

Date	Consultee and type of consultation	Summary of issue(s) raised	Applicant's response to issue raised and, if applicable, where considered in this chapter
		The Scottish Ministers advise that their current position is that the Developer should consider potential impacts on local communities as a result of the Proposed Development and outline how baseline data will be collected to assess impacts in the future. The Scottish Ministers are considering this position and, should this develop or change, the Developer will be notified.	Where possible, assessment of potential impacts on communities have been assessed. Where local communities cannot be determined, example communities are used to demonstrate routes to impact. Baseline data is included in Section 17.7 and impacts are discussed in Section 17.11.
		It is recommended that the Developer include additional analysis regarding potential job creation in comparison to existing jobs in the study areas, as outlined in the MAU advice.	Baseline data is included in Section 17.7. Job creation as well as a breakdown of employment by occupational type is discussed in Section 17.11.

17.5 Scope of the assessment

17.5.1 Impacts scoped into the assessment

17.5.1.1 The scope of this EIA Report has been developed in consultation with relevant statutory and non-statutory consultees as detailed in Table 17.3. Taking into account the scoping and consultation process, Table 17.4 summarises the potential impacts which have been scoped into this assessment. Where an impact is likely to occur within a specific development phase of the project, this is indicated within each relevant topic chapter (a '✓' is used to denote the phase the potential impact can occur, conversely a '✗' outlines there is no impact within this project phase), where relevant.

Table 17.4: Potential impacts scoped into the socio-economics assessment

C= Construction, O= Operations and Maintenance, D= Decommissioning phases

Potential impact	Phase			Activity
	C	O	D	
Employment and GVA impacts	✓	✓	✓	Increased economic impact associated with expenditure in Scotland and the UK, as well as at the construction and O&M port
Demographic changes and demand for housing and other services	✓	✓	✓	Increased employment at construction and O&M ports may result in increased populations, resulting in social impacts on housing and other services
Changes to commercial fisheries	✓	✓	✓	Any effects on commercial fisheries may have socio-economic effects
Changes to shipping and marine recreation	✓	✓	✓	Any changes to shipping and marine recreation may have socio-economic effects
Changes to visitor behaviour	✓	✓	✓	Increased offshore vessel activity may affect visitor behaviour (e.g. at cruise terminals and visitor attractions)

17.6 Approach to baseline characterisation

17.6.1 Introduction

17.6.1.1 The socio-economic baseline environment has been characterised through a literature review of key desktop datasets and reports (see Table 17.5).

17.6.2 Relevant guidance

17.6.2.1 Specific to the socio-economic baseline characterisation, the following guidance document has been considered: General Advice for Offshore Socio-economic Impact Assessment (Marine Analytical Unit, 2022). In line with this guidance, a wide range of data sources has been identified including the Scottish Annual Business Statistics, official labour market statistics from Nomis and the sub-Scotland Economic Statistics Database. Where relevant, data sources have been considered to assess population, the labour market and different industrial sectors. As the ports to be used during construction and O&M have not been identified, the baseline has broadly focused on Scottish and UK economies plus key demographic and labour market indicators for a range of potential Local Socio-Economic Study Areas.

17.6.3 Desktop study

17.6.3.1 Information on socio-economics within the Local Socio-Economic Study Area was collected through a detailed desktop review of existing studies and datasets. These are summarised in Table 17.5 below.

Table 17.5: Summary of key desktop reports used to characterise the socio-economic baseline

Title	Source	Year	Author
National population projections: 2022-based	ONS	2025	ONS
Annual Population Survey	ONS	2024	ONS
Annual Survey of Hours and Earnings 2024	ONS	2024	ONS
Business Register and Employment Survey (BRES) 2023, Great Britain	ONS	2024	ONS
Population estimates - local authority based by single year of age	ONS	2024	ONS
Mid-2023 Population Estimates – local authority	NRS	2024	NRS
Mid-2023 Population Estimates: Single year of age and sex	Northern Ireland Statistics Research Agency (NISRA)	2024	NISRA
BRES, Northern Ireland, 2022	NISRA	2023	NISRA
Electoral ward population estimates	NRS	2022	NRS
BRES 2013, Great Britain	ONS	2015	ONS
BRES Northern Ireland, 2012 Employee Jobs	NISRA	2015	NISRA

Note that data sources include Northern Ireland sources. These are required because some data sources include only Great Britain and so Northern Ireland data needs to be added to give the total for the UK.

17.6.4 Site specific surveys

17.6.4.1 No site specific surveys have been undertaken to inform the EIA for socio-economics. This is because publicly available statistics were sufficient to form a view on the baseline environment.

17.7 Baseline environment

17.7.1 Overview of baseline environment

17.7.1.1 A summary of the socio-economics baseline is provided in the following sections.

Population

17.7.1.2 As summarised in Table 17.6, in 2023, Scotland had a population of 5,490,100, accounting for 8.0% of the total population across the UK in the same year (68,265,210) (Office for National Statistics, 2024a).

17.7.1.3 The share of the working age population (those aged 16 to 64 years old) across Scotland was 63.4% of the total population, a higher share than the UK as a whole (62.8%) (Office for National Statistics, 2024a) (NISRA, 2024). In the same year, the share of the population aged 65 and over, represented 20.3% of the total population in Scotland, 1.4 percentage points greater than the proportion in the UK (18.9%).

Table 17.6: Population by age group, 2023

Age group	Scotland	UK
Aged 0-15	16.3%	18.3%
Aged 16-64	63.4%	62.8%
Aged 65+	20.3%	18.9%
Total	**5,490,100**	**68,265,210**

Economic activity

17.7.1.4 In 2024, the economic activity rate (which is the percentage of the working age population taking part in the labour market, who are either in or looking for employment) in Scotland was 77.0%, 1.4 percentage points below the UK wide economic activity rate of 78.4% (Office for National Statistics, 2024b). In the same year, the unemployment rate across Scotland and the UK were 3.3% and 3.8%, respectively.

17.7.1.5 The median annual income of Scotland's residents in 2024 was £38,286, 2.3% greater than the median annual income across the UK as a whole (£37,430) (Office for National Statistics, 2024c).

Table 17.7: Economic activity rate and median annual income, 2024

Economic indicator	Scotland	UK
Economic activity rate	77.0%	78.4%
Unemployment rate	3.3%	3.8%
Median annual income	£38,286	£37,430

Industrial structure

17.7.1.6 Table 17.8 illustrates data from the most recent Business Register and Employment Survey (BRES), which provides data on employment by economic sector (Office for National Statistics, 2024d) (NISRA, 2023). The latest available for information for Scotland, England and Wales is based on 2023 figures, while figures for Northern Ireland are based on 2022 data (these are considered as part of the UK figures). This shows there were 2,657,000 jobs in Scotland, accounting for 8.0% of the total 33.1 million jobs across the UK (Office for National Statistics, 2024d) (NISRA, 2023).

17.7.1.7 During the development phase of Morven North, including project management, project design and environmental impact assessments, there will be opportunities for the professional, scientific and technical sector. According to BRES, this sector accounts for around 190,000 jobs in Scotland, 7.2% of employment, compared to 9.2% for the UK.

17.7.1.8 Economic sectors relevant to the construction phase of Morven North include manufacturing and construction. Manufacturing accounts for around 178,000 jobs in Scotland, representing approximately 6.7% of total employment across Scotland, and contributing 7.2% of the UK's total manufacturing jobs (which

employs 2.5 million people and represents 7.4% of the UK's workforce). Relevant construction sectors[1] account for 228,500 jobs in Scotland, or 8.6% of the total, while in the UK it accounts 2.3 million jobs or 7.0% of employment. These relevant sectors are also most likely to be associated with O&M opportunities and decommissioning.

Table 17.8: Employment by economic sector, 2023

Economic sector	Scotland	UK
Human health and social work activities	15.6%	13.7%
Wholesale and retail trade	13.2%	13.7%
Accommodation and food service activities	8.6%	7.9%
Education	8.2%	8.4%
Professional, scientific and technical activities	7.2%	9.2%
Administrative and support service activities	6.8%	8.5%
Manufacturing	6.7%	7.4%
Public administration and defence	6.2%	4.6%
Construction	5.1%	4.9%
Transportation and storage	4.5%	4.9%
Agriculture, forestry and fishing	3.4%	1.4%
Financial and insurance activities	3.2%	3.3%
Information and communication	3.1%	4.4%
Arts, entertainment and recreation	2.7%	2.6%
Other service activities	1.7%	2.0%
Real estate activities	1.5%	2.0%
Mining and quarrying	0.9%	0.1%
Water supply activities	0.8%	0.7%
Electricity, gas, steam and air conditioning supply	0.8%	0.4%
Total employment	**2,657,000**	**33,052,229**
Relevant construction sectors	***8.6%***	***7.0%***

[1] The relevant construction sectors have been defined using the following Standard Industrial Classifications: 06: Extraction of crude petroleum and natural gas, 41: Construction of buildings, 42: Civil engineering, 43: Specialised construction activities, 50: Water transport, 71: Architectural and engineering activities; technical testing and analysis

Change in employment

17.7.1.9 Table 17.9 illustrates the change in employment figures between 2013 and 2023. The number of jobs in Scotland increased by 7.9% between 2013 and 2023, a lower rate of growth than the UK as a whole, which experienced an increase in employment of 14.3% (Office for National Statistics, 2024d) (NISRA, 2023).

Table 17.9: Change in employment (2013 to 2023)

	Scotland	UK
Change in employment (%)	7.9%	14.3%

Indicative port locations (Local Socio-economic Study Areas): demographic and labour market indicators

17.7.1.10 Baseline data (population, workforce and employment in relevant sectors) for the Local Socio-Economic Study Areas is presented in Table 17.10, using the latest available data (Office for National Statistics, 2024a) (NRS, 2022) (Office for National Statistics, 2024d) (Scottish Government, 2025a). The relevant sectors[2] are those most associated with the employment opportunities that are expected to be available, during both construction and O&M.

17.7.1.11 This shows that the port associated with the lowest population, workforce and employment in relevant sectors is the Scapa Deep Water Quay socio-economic Local Socio-Economic Study Area. The largest population and workforce is associated with the Leith Local Socio-Economic Study Area (as it includes the City of Edinburgh), whilst the largest employment in relevant sectors is associated with the Aberdeen Local Socio-Economic Study Area (which has an established offshore energy sector).

Table 17.10: Indicative port locations (Local Socio-Economic Study Areas)

Port	Population	Workforce (total employment)	Workforce in relevant sectors
Construction			
Aberdeen	334,560	210,585	35,910
Ardersier	87,425	60,590	5,795
Burntisland	325,688	121,625	8,735
Cromarty Firth	114,095	66,155	6,515
Dundee	261,740	118,695	7,885
Leith	505,750	372,700	18,675
Methil	373,730	138,700	9,395
Nigg	125,765	69,440	7,165

[2] The relevant sectors have been defined using the same sectors as in Table 17.8.

Port	Population	Workforce (total employment)	Workforce in relevant sectors
Scapa Deep Water Quay	22,030	13,195	1,375
Rosyth	379,372	135,060	10,005
O&M			
Aberdeen	334,560	210,585	35,910
Ardersier	87,425	60,590	5,795
Buckie	146,196	51,865	4,910
Burntisland	325,688	121,625	8,735
Dundee	261,740	118,695	7,885
Fraserburgh	143,469	55,000	8,490
Macduff	112,419	35,110	3,845
Montrose	114,874	34,810	3,390
Scapa Deep Water Quay	22,030	13,195	1,375
Peterhead	159,248	63,135	8,925
Wick	25,347	10,900	1,240

17.7.2 Future baseline scenario

17.7.2.1 The EIA Regulations require the following to be included within the EIA Report: “a description of the relevant aspects of the current state of the environment (baseline scenario) and an outline of the likely evolution thereof without implementation of the development as far as natural changes from the baseline scenario can be assessed with reasonable effort, on the basis of the availability of environmental information and scientific knowledge.”

17.7.2.2 From 2023 to 2047, the population of Scotland is projected to increase by 5.1% by 2047, whilst the population of the UK is expected to grow by 10.7% (Office for National Statistics, 2025b). This is summarised in Table 17.11.

17.7.2.3 A critical aspect of these demographic changes is the shift in the working-age population, defined as individuals aged 16 to 64 years old. During the period to 2047, the share of the population aged 16 to 64 years old in Scotland is projected to decrease from 63.4% to 61.0%. Given the overall increase in the population this represents an increase equivalent to 45,520 people, or 1.3%. Over the same period, this population demographic is projected to decrease from 62.8% to 61.9% across the UK, equivalent to a population increase of 4.5 million or a 10.5% increase.

17.7.2.4 The slower increase in Scotland's working-age population presents a challenge to its 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 Scotland's population trends and economic performance.

Table 17.11: 2022-based population projections

Indicator	Scotland		UK	
	2023	2047	2023	2047
Aged 0-15	16.3%	14.1%	18.3%	15.1%
Aged 16-64	63.4%	61.0%	62.8%	61.9%
Aged 65+	20.3%	25.0%	18.9%	23.0%
Total	**5,490,100**	**5,782,680**	**68,265,210**	**76,550,535**

17.7.3 Data limitations and assumptions

17.7.3.1 Most of the data in the baseline assessment is based on surveys carried out by national statistical agencies and sectoral organisations. Given the process required to produce reliable statistics, between the time when data is collected and published, there is often a lag. This means that the latest available data on a given socio-economic indicator may not fully reflect baseline conditions at the time of writing.

17.7.3.2 To ensure as accurate a characterisation of the existing environment as possible, data was collected close to the time of submission. Furthermore, even if the latest available evidence does not reflect current conditions, most of the socio-economic dimensions considered present a degree of dependence on past performance. On that basis, the latest available data provides a relatively good approximation of the current environment.

17.7.3.3 The use of a range of statistics to characterise each of the geographies considered as part of the baseline environment reduces the risk that conclusions may be affected by issues arising within any individual statistical survey.

17.7.3.4 In addition, as construction and O&M ports have not been selected it has not been possible to undertake a baseline assessment of the Local Socio-economic Areas.

17.7.3.5 Overall, the data limitations described above are not expected to have implications for the conclusions of the assessment.

17.8 Methodology for assessment of effects

17.8.1 Overview

17.8.1.1 The socio-economic impact assessment has followed the methodology set out in Volume 1, Chapter 6: EIA Methodology. Specific to the economic assessment, the following guidance documents have also been considered:

- General Advice for Offshore Socio-economic Impact Assessment (Marine Analytical Unit, 2022);
- Defining 'local area' for assessing impact of offshore renewables and other marine developments: guidance principles (Marine Directorate, 2022).

Economic impact assessment

17.8.1.2 The economic impacts considered for each of the Study Areas, including the Local Socio-economic Study Areas, Scotland and the UK, are measured in:

- 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.

17.8.1.3 The economic impact focuses on the direct impact (spending on Tier 1 suppliers) as well as the indirect effect (spending in the supply chain). In addition to this, the assessment also considers the effects of staff spending and the economic impact that this subsequent increase in demand stimulates (induced effect).

17.8.1.4 As the information on expenditure is based on the SCDS, which is in 2023 prices, the economic impacts are presented in 2023 prices.

17.8.1.5 Deadweight (what would have happened without Morven North), leakage (economic impacts occurring outside of the Study Areas considered) and displacement (economic activity that is being displaced by Morven North) have been taken into consideration and are discussed in Section 2.6, Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report.

17.8.1.6 Morven North will include the construction and installation of foundations and wind turbines, the offshore substation platforms and inter-array and interconnector cables. The analysis for Morven North covers three phases:

- Construction (including development[3], manufacturing and fabrication, and installation);
- O&M;
- Decommissioning.

17.8.1.7 In line with standard practice for socio-economics chapters, development expenditure and related impacts are considered as part of the construction phase, as these will also generate short-term economic activity and employment (e.g., measured in years of employment).

17.8.1.8 In addition to impacts at the Scottish and UK level, Section 4.2, Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report sets out the economic impacts that are expected to take place at the construction and O&M ports.

17.8.1.9 As well as assessing the economic impact on the Scottish and UK economies, the economic impact assessment has focused on how the economies of indicative construction and O&M ports could be affected by economic changes, including increases to population. This is expected to vary depending on the different phases considered, (e.g. a temporary increase in workers during construction will have different effects compared to a long-term increase in employment in a given area).

17.8.1.10 It is important to note that at this stage, predicting the precise nature and extent of the economic impact associated with Morven North is not feasible, since the construction and O&M ports are not yet known. However, an assessment has been undertaken based on the MDS, which is discussed in Section 17.11.2.

17.8.1.11 The MDS for the increase in employment and GVA is represented by assessing the indicative construction and O&M port locations expected to experience the lowest beneficial economic impacts. The

[3] Includes all spending by the Applicant to develop the project, including project management, surveys and data collection, permitting and consents and preliminary engineering.

assessment considers the Local Socio-Economic Study Area with the largest population, and therefore the lowest sensitivity to economic changes.

17.8.1.12 In addition to the increase in employment and GVA, the following economic impacts are included:

- Changes to commercial fisheries;
- Changes to shipping and marine recreation.

Social impact assessment

17.8.1.13 As well as generating economic impacts in each of the Local Socio-Economic Study Areas considered, Morven North may have social impacts on the communities where economic activity takes place. The magnitude of these social impacts is expected to result from the level of economic impact associated with Morven North, and the share of employment that could be sourced from the local workforce.

17.8.1.14 Therefore, the social impact assessment aims to outline the primary pathways through which Morven North could lead to social impacts. It focuses on the following key areas:

- Demographic changes;
- Housing demand and availability;
- Impacts on other local services.

17.8.1.15 The social impact assessment has focused on how communities could be affected by economic changes, and how different characteristics (such as the size of the settlement, its economic characteristics and social dynamics) will inform the types of social impacts that are experienced as well as their sensitivity to change. This is expected to vary depending on the different phases considered (e.g. a temporary increase in workers during construction will have different effects compared to a long-term increase in employment in a given area).

17.8.1.16 The MDS is represented by assessing the indicative construction and O&M port location which most sensitive to social impacts. The assessment therefore considers the port location local area with the smallest population, and therefore the highest sensitivity to social changes and the levels of employment in relevant sectors, and therefore the ability to meet labour demand from the existing population.

17.8.1.17 It is important to note that at this stage, predicting the precise nature and extent of socio-cultural impacts associated with Morven North is not feasible, since the construction and O&M ports are not yet known.

Tourism impact assessment

17.8.1.18 Impacts will occur on tourism receptors, such as tourism attractions and marine recreation infrastructure, if they are sensitive to changes in environmental factors that will occur as a result of Morven North and the receptor is considered to experience a likely significant effect as a result of changes to these environmental factors.

17.8.1.19 The impacts considered on tourism assets are changes to visitor or user behaviour and outcomes. Any environmental impact on these receptors will therefore be assessed against how it will change behaviour compared to the current baseline of visitor or user behaviour of the receptor.

17.8.2 Assessment criteria

17.8.2.1 The approach for determining the significance of effects is a two-stage process that involves defining the sensitivity of the receptors and the magnitude of the potential impacts. This section describes the criteria applied in this chapter to assign values to the magnitude of potential impacts and the sensitivity of the receptors. The terms used to define sensitivity and magnitude for socio-economics are based on those described in further detail in Volume 1, Chapter 6: EIA Methodology.

17.8.2.2 The following impacts are considered:

- economic impacts, focusing on the potential impacts on sectors within the economy;
- social impacts, considering the potential impacts on community and community infrastructure;
- tourism impacts, considering the potential impacts on tourism assets.

Sensitivity

Sensitivity of economic receptors

17.8.2.3 The sensitivity of an economy is determined by how well it can adapt to change. The factors that determine the sensitivity of an economy include its size, how reliant it is on a single sector, and if there is a growing number of jobs. The criteria for defining sensitivity in this chapter are outlined in Table 17.12 below.

Table 17.12: Definition of terms relating to the sensitivity of economic receptor

Value (sensitivity of the receptor)	Definition
Very high	A very highly sensitive economy will not be able to adapt to changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of high sensitivity include: • The economy significantly relies on a single sector; • The number of jobs in the economy has been declining over multiple years.
High	A highly sensitive economy will struggle to absorb changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of high sensitivity include: • The economy is particularly reliant on a single sector; • The number of jobs in the economy has been declining over multiple years.
Medium	A medium sensitive economy will be tolerant of changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of medium sensitivity include: • The economy is particularly reliant on a small number of sectors; • The number of jobs in the economy has been stable over multiple years.
Low	A low sensitive economy is able to adapt to changes without fundamentally altering its present character or value. Factors that would contribute to an economy being considered of low sensitivity include: • Most sectors of the economy are well represented; • The number of jobs in the economy has grown in line with the wider economy.
Negligible	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: • The economy is well balanced between sectors; • The number of jobs in the economy has grown at a quicker rate than the wider UK economy.

Sensitivity to demographic changes and demand for housing and other services

17.8.2.4 The sensitivity of social assets will depend on their relative capacity to adapt to change and meet increased demand without affecting existing services (e.g. whether there is additional capacity in the

housing market and schools, as well as specific local circumstances, such as the composition of the population).

17.8.2.5 For example, the main factor affecting the sensitivity of a port local area will be the size of the existing population and its demographics. A larger population (e.g. a port located close to a large population), as well as a population that has a larger share of people who are working age, will be less sensitive to population change compared to a community with less balanced demographics (e.g. a high number of people aged over 65).

17.8.2.6 Figure 17.1 provides details on the factors that influence how a community might respond to changes in demographics and other population impacts.

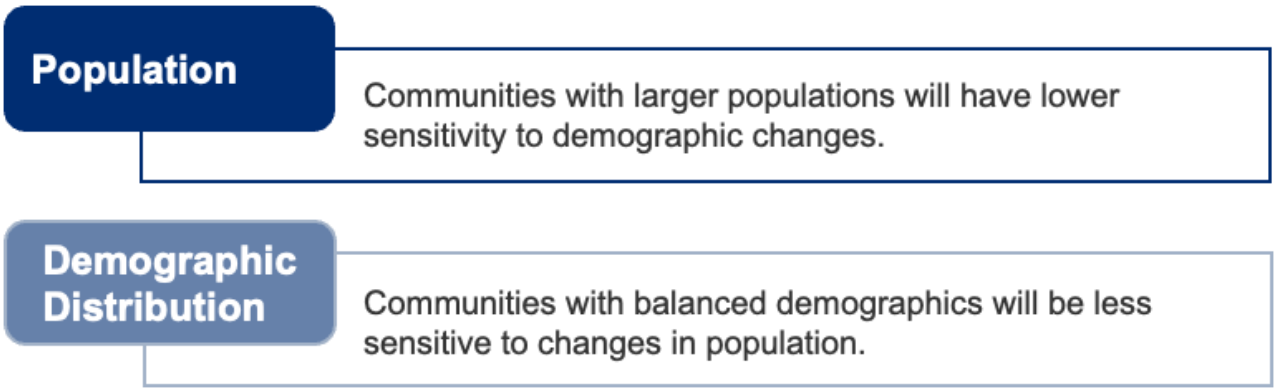

Figure 17.1: Factors affecting sensitivity of community populations

17.8.2.7 Housing demand and availability will follow on from the demographic impacts.

17.8.2.8 The impact of housing on communities depends on how well the housing supply can adjust to changes in demand over short and long periods of time. The sensitivity of local areas to these impacts is influenced by factors such as the size of the nearby population, the availability of accommodation options like hotels and adaptable living spaces, the ability of the housing sector to meet increased demand and affordability of accommodation.

17.8.2.9 Research undertaken for the Scottish Government suggests that coastal communities face a number of housing constraints, particularly in terms of high-quality options (Scottish Government and Diffley Partnership, 2022). The importance of visitors using temporary accommodation (a reflection of the overnight tourism) also affects how sensitive an area is to these changes.

17.8.2.10 Figure 17.2 provides details on the factors that influence how a community might respond to changes in housing demand and availability impacts.

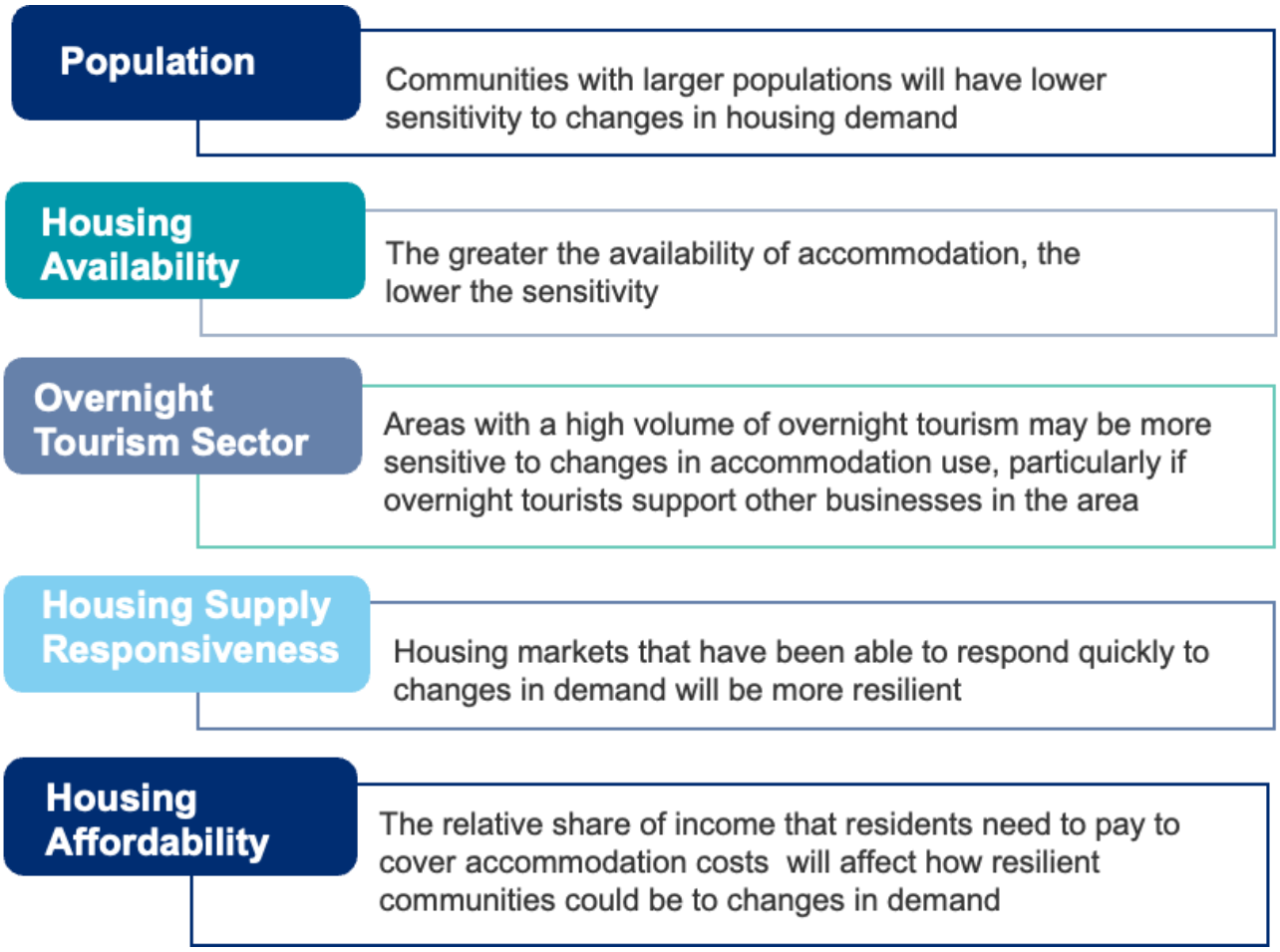

Figure 17.2: Factors affecting sensitivity of housing supply

17.8.2.11 Morven North has the potential to affect services (such as health and education) around epicentres of impact, such as the construction port and O&M ports. These impacts will be driven by changes in the population. The sensitivity of these services will primarily be determined by the level of capacity within each of these services, and how quickly they are able to respond to changing demand (e.g. hire more staff).

17.8.2.12 Figure 17.3 provides details on the factors that influence the sensitivity of local services.

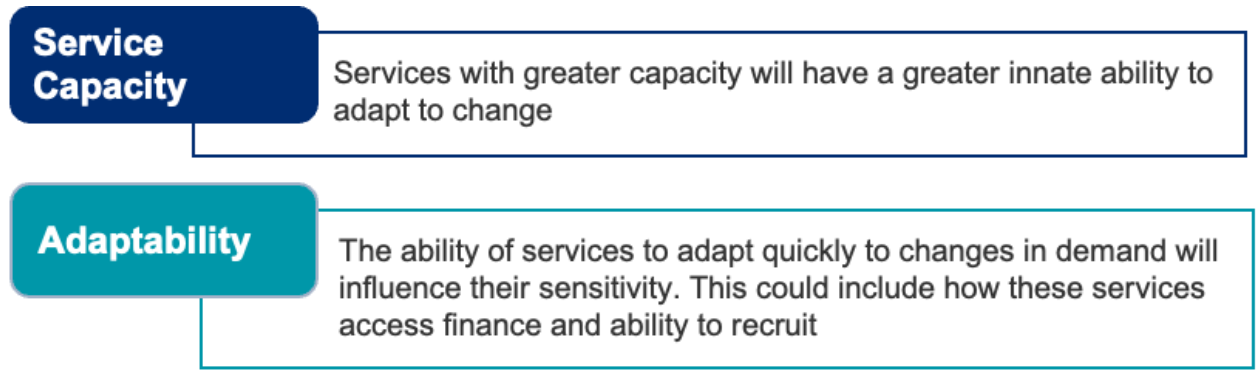

Figure 17.3: Factors affecting sensitivity of local services

Sensitivity of tourism assets

17.8.2.13 The sensitivity of a tourism 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 associated with other sea users but have negligible sensitivity to changes in shipping and navigation.

17.8.2.14 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 are more likely to be sensitive to change.

17.8.2.15 The sensitivity criteria for defining sensitivity for tourism receptors are outlined in Table 17.13.

Table 17.13: Definition of terms relating to the sensitivity of tourism assets

Value (sensitivity of the receptor)	Definition
Very high	A tourism asset with a very high sensitivity will be unable to tolerate or adapt to effects as these will result in a fundamental change in visitor behaviour. Factors that will contribute to a tourism asset being considered of very high sensitivity include: • Being entirely dependent on a single environmental condition to attract or accommodate visitors and users; • Being unable to adapt or adjust in response to changes in visitor or user behaviour.
High	A tourism asset with a high sensitivity will struggle to tolerate or adapt to effects as these will result in a fundamental change in visitor behaviour. Factors that will contribute to a tourism asset being considered of high sensitivity include: • Being dependent on a single environmental condition to attract or accommodate visitors and users; • Struggling to adapt or adjust in response to changes in visitor or user behaviour.
Medium	A tourism 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 asset being considered of medium sensitivity include: • Being influenced by a small number of environmental conditions to attract or accommodate visitors and users; • Having a limited ability to adapt or adjust in response to changes in visitor or user behaviour.
Low	A tourism 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 asset being considered of low sensitivity include; • Environmental conditions have a minor influence on the ability of the asset to attract or accommodate visitors and users; • Being able to adapt or adjust the assets in response to changes in visitor or user behaviour.
Negligible	A tourism asset with a negligible sensitivity will be resistant to changes in environmental factors. Factors that will contribute to a tourism asset being considered of negligible sensitivity include;

Value (sensitivity of the receptor)	Definition
	• Environmental conditions have a negligible influence on the ability of the asset to attract or accommodate visitors and users; • Having substantial ability to adapt or adjust the assets in response to changes in visitor or user behaviour.

Magnitude

17.8.2.16 The temporal duration is expected to be different for each of the phases, with construction and decommissioning, taking around five years each, considered temporary, and the O&M phase, which is expected to last for 35 years, considered long-term.

Magnitude of economic impacts

17.8.2.17 The socio-economic impacts have been considered over distinct Study Areas to capture the spatial extent of any impact. Spatial extent covering the whole of Scotland and the UK have been considered when assessing for the total expenditure associated with Morven North while spatial extent covering localised port locations have been determined when assessing expenditure associated with the Local Socio-Economic Study Areas.

17.8.2.18 Between 2000 and 2024, the average level of Gross Domestic Product (GDP) per capital growth in the UK was 1.0% per annum (International Monetary Fund, 2025). Similarly, between 2000 and 2023, the number of jobs increased by an average of 1.0% per annum (Office for National Statistics, 2025a). 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.

17.8.2.19 The criteria for defining magnitude in this chapter are outlined in Table 17.14 below.

Table 17.14: Definition of terms relating to the magnitude for economic impacts

Magnitude of impact	Definition
High	An effect would be considered to have a high magnitude if it was equivalent to all of the typical economic growth per capita. For each Study Area: • Peak annual GVA impact is greater than, or equal to, 1% of relevant sectors; or • Peak employment supported is greater than, or equal to, 1.0% of jobs in relevant sectors.
Medium	An effect would be considered to have a medium magnitude if it was equivalent to half of the typical economic growth per capita. For each Study Area: • Peak annual GVA impact is greater than, or equal to, 0.5% of relevant sectors; or • Peak employment supported is greater than, or equal to, 0.5% of jobs in relevant sectors.
Low	An effect would be considered to have a low magnitude if it was equivalent to a quarter of the typical economic growth per capita. For each study are: • Peak annual GVA impact is greater than, or equal to, 0.25% of relevant sectors; or

Magnitude of impact	Definition
	• Peak annual employment supported is greater than, or equal to, 0.25% of the jobs in relevant sectors.
Negligible	An effect would be considered to have a negligible magnitude if it was equivalent to less than a quarter of typical economic growth per capita. Therefore, for each Study Area: • Peak Annual GVA impact is less than 0.25% of relevant sectors; or • Peak employment supported is less than 0.25% of jobs in relevant sectors.

Magnitude of demographic changes and demand for housing and other services

17.8.2.20 The magnitude of impacts on the social or community assets will be dependent on the scale of the economic and demographic changes that occur in each of the Study Areas and how these affect demand for services, such as housing, education and health.

17.8.2.21 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 also distinct differences between ports in urban and rural areas, e.g. population size and composition. As a result, the impact on demographic structures will depend on the location of the construction port.

17.8.2.22 During the construction phase, workers will be required to fulfil contracts at the construction port. Depending on the capacity of the local economy, some of these may be new workers moving to the area. The composition of the population of new workers will affect demand for certain services in the Local Socio-economic Study Area. Industry data suggests that these are expected to be primarily men aged 30 to 44, who may be more likely to bring spouses and children, which may affect demand for certain types of housing as well as healthcare and education services. The industry is also making efforts to diversify this demographic and increase female representation to 33% by 2030 (Offshore Wind Industry Council, 2025).

17.8.2.23 There is anecdotal evidence that in rural communities in Scotland, the opportunity to capture high quality local employment may draw people back to the area who have previously left to find work elsewhere (Highlands and Islands Enterprise, 2018). This would be considered an important demographic benefit from increasing the working age population in rural communities, including for short-term opportunities like this one.

17.8.2.24 The factors that determine the magnitude of change to community populations are outlined in Figure 17.4.

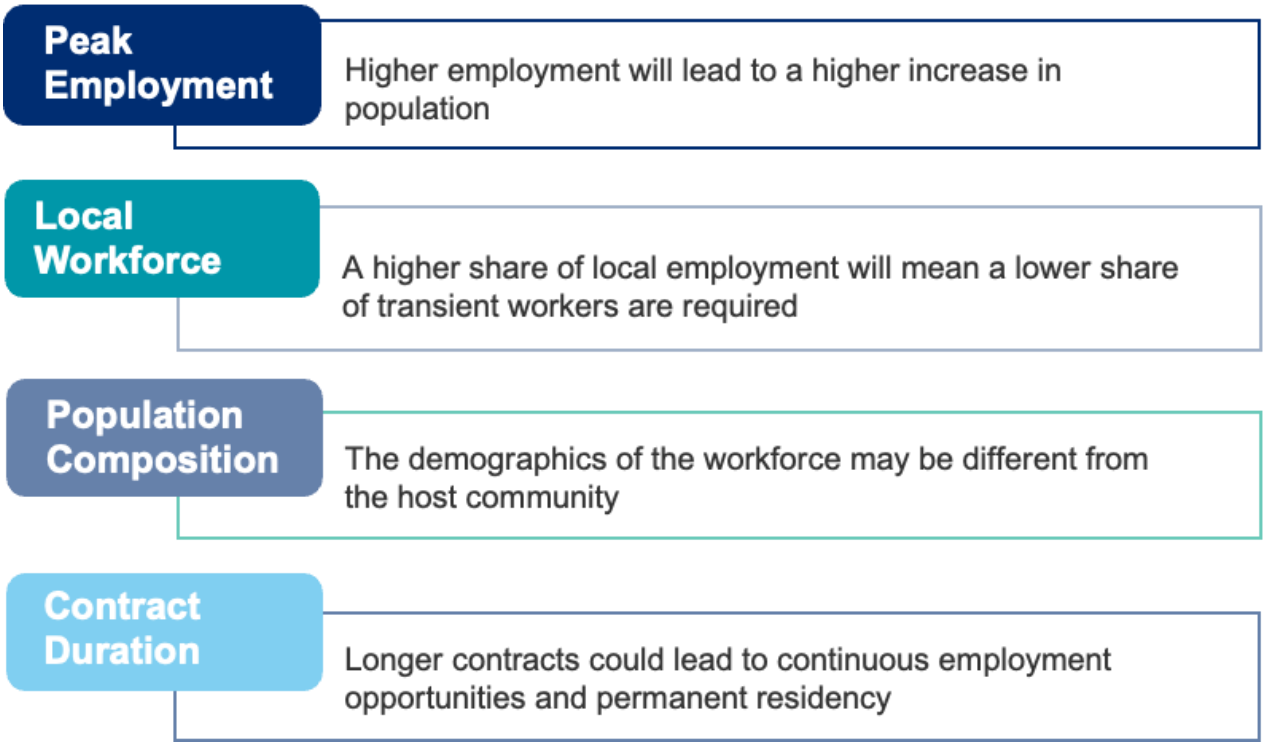

Figure 17.4: Factors affecting magnitude of change to community populations

17.8.2.25 The main driver of housing demand is expected to be the increased population required to meet the requirements of the construction port. During the peak of construction, Morven North is expected to require increased demand for short-term accommodation, such as hotels, bed and breakfasts, and caravan parks.

17.8.2.26 The heightened demand for temporary housing is expected to benefit local accommodation providers. Increased trade and occupancy rates can provide a vital lifeline for these businesses, helping them remain operational year-round and offering sustained employment opportunities in rural areas.

17.8.2.27 However, if the local accommodation sector is nearing or at total capacity and cannot expand rapidly to accommodate the influx, this could adversely impact tourism. Visitors may face difficulties securing accommodation, particularly during peak seasons, potentially leading to a downturn in tourism-related activities.

17.8.2.28 The factors that determine housing demand and availability impact are outlined in Figure 17.5.

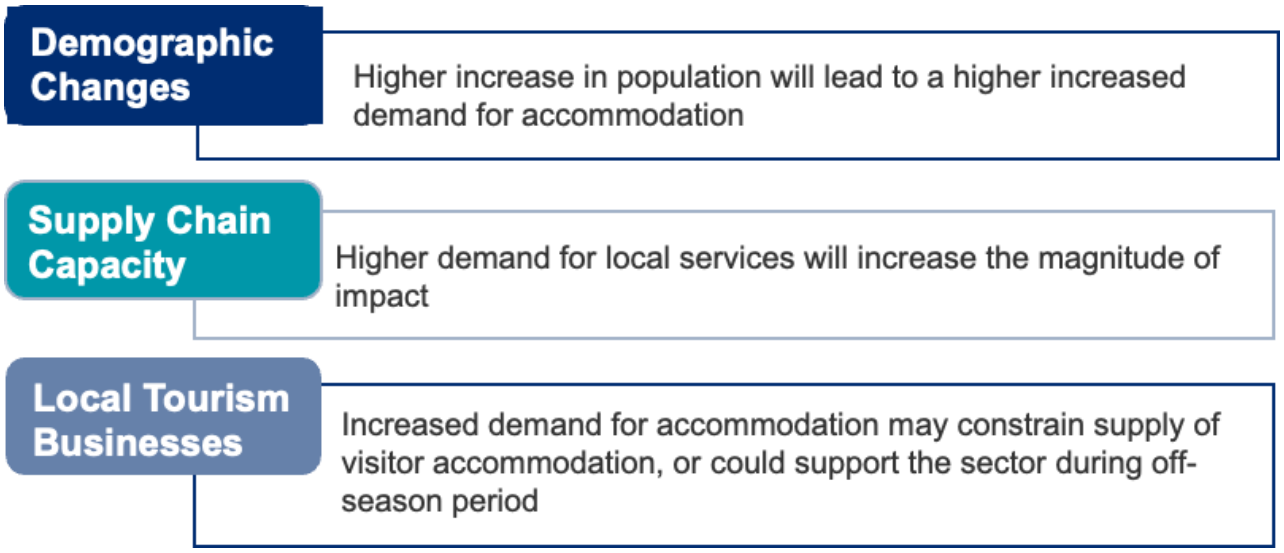

Figure 17.5: Factors affecting magnitude of change to housing demand and availability

17.8.2.29 The anticipated population increase around the construction port is likely to increase demand for healthcare, educational, and private services.

17.8.2.30 The main influences on demand for healthcare services are expected to be a temporary population increase and the health of that population. Specifically, individuals involved in port activities are generally working-age adults in good health, which means they are expected to be less likely to access public health services such as general practitioners, 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).

17.8.2.31 The distinct differences between the demographic structure of rural and urban areas will affect a community's dependency on local services. For example, within rural communities with a smaller and older baseline population, there is likely to be a greater demand for local services designed to support the elderly.

17.8.2.32 The demand for schools and educational services depends on the number of children in the under-18 population, especially if transient workers bring their children. This is more likely if employment opportunities are seen as long-term, while short-term employment opportunities are unlikely to result in a large increase in educational demand is not expected.

17.8.2.33 A larger population is likely to result in a rise in demand for personal services such as cafes, restaurants, and supermarkets. This is expected to boost the commercial vitality of towns and villages, leading to benefits for local businesses and the economy. It may also contribute to increased use of public transport and more traffic on local road networks.

17.8.2.34 The factors that determine the impact of demand for services are outlined in Figure 17.6.

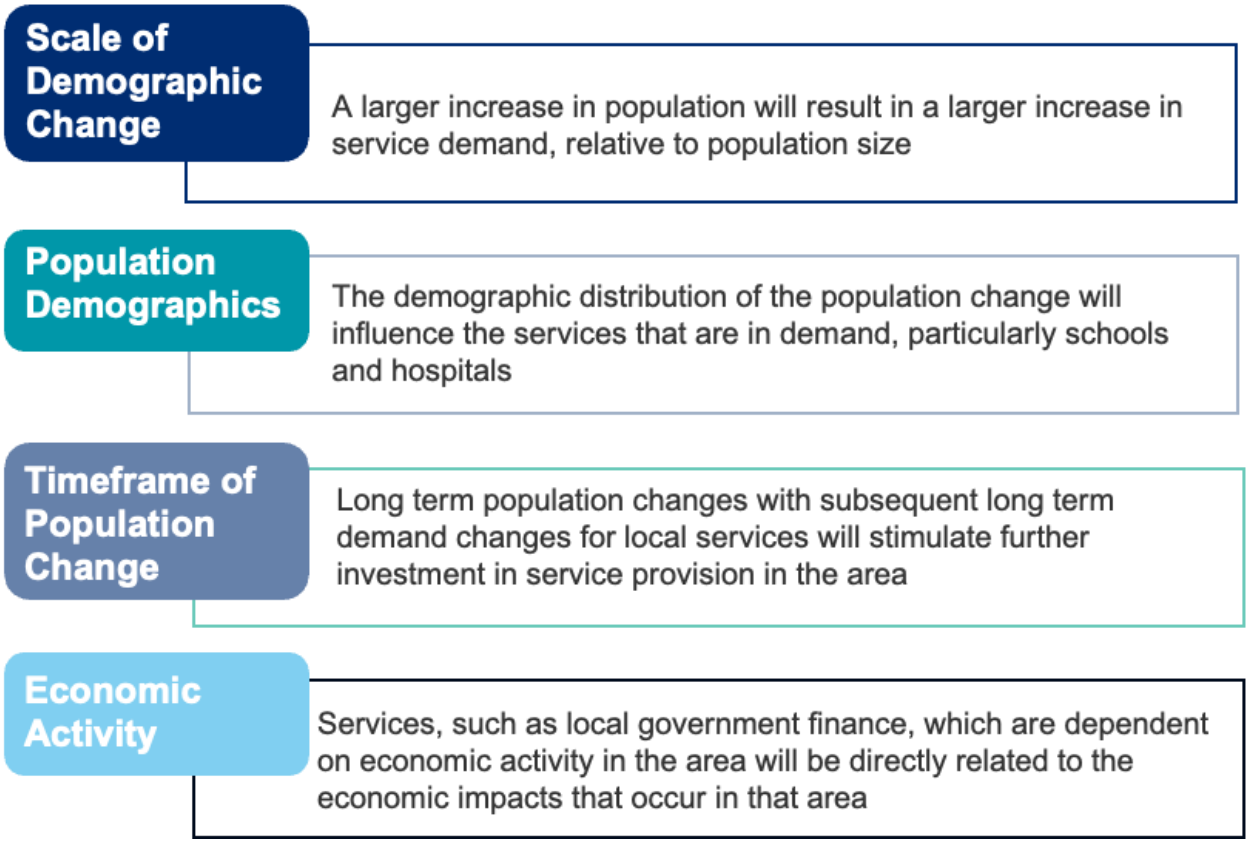

Figure 17.6: Factors affecting magnitude of change to local services

17.8.2.35 Given the importance of demographic impacts on housing and demand for services, the assessment of social impacts has focused on was based on the criteria outlined in Table 17.15.

Table 17.15: Definition of terms relating to the magnitude of demographic changes and demand for housing and other services

Magnitude of impact	Definition
High	An effect would be considered to have a high magnitude if the increase in population was equivalent to 1.0% of the current population or greater.
Medium	An effect would be considered to have a medium magnitude if the increase in population was equivalent to between 0.5% and 1.0% of the current population.
Low	An effect would be considered to have a low magnitude if the increase in population was equivalent to between 0.25% and 0.5% of the current population.
Negligible	An effect would be considered to have a negligible magnitude if the increase in population was equivalent to less than 0.25% of the current population.

Magnitude of tourism impacts

17.8.2.36 The impacts considered on tourism assets are changes to visitor or user behaviour and outcomes. Any environmental impact on these receptors will therefore be assessed against how it will change

behaviour compared to the current baseline of visitor or user behaviour of the receptor. The definitions of the magnitude of impacts on tourism assets are provided in Table 17.16.

Table 17.16: Definition of terms relating to the magnitude for tourism assets

Magnitude of impact	Definition
High	The impact on a tourism asset would be considered to have a high magnitude if it is predicted to experience a major change of behaviour of visitors or users.
Medium	The impact on a tourism asset would be considered to have a medium magnitude if is predicted to experience a moderate change of behaviour of visitors or users.
Low	The impact on a tourism asset would be considered to have a low magnitude if is predicted to experience a minor change of behaviour of visitors or users.
Negligible	The impact on a tourism asset would be considered to have a negligible magnitude if is predicted to experience an undetectable change of behaviour of visitors or users.

Significance of effect

17.8.2.37 The significance of the effect upon socio-economics is determined by correlating the magnitude of the impact and the sensitivity of the receptor. The particular method employed for this assessment is presented in Table 17.17. In cases where a range is suggested for the significance of effect, there remains the possibility that this may span the significance threshold (i.e. the range is given as minor to moderate). In such cases the final significance is based upon the expert's professional judgement as to which outcome delineates the most likely effect, with an explanation as to why this is the case.

17.8.2.38 For the purposes of this assessment:

- a level of effect of moderate or more will be considered a 'significant' effect in terms of the EIA Regulations;
- a level of effect of minor or less will be considered 'not significant' in terms of the EIA Regulations.

17.8.2.39 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 17.17: Matrix used for the assessment of the significance of the effect

Sensitivity of receptor	Magnitude of impact				
		Negligible	Low	Medium	High
	Negligible	Negligible	Negligible to minor	Negligible to minor	Minor
	Low	Negligible to minor	Negligible to minor	Minor	Minor to moderate
	Medium	Negligible to minor	Minor	Moderate	Moderate to major
	High	Minor	Minor to moderate	Moderate to major	Major
	Very high	Minor	Moderate to major	Major	Major

17.9 Parameters for assessment

17.9.1 Maximum Design Scenario

17.9.1.1 The MDSs are identified in Table 17.18 have been selected as those having the potential to result in the greatest effect on an identified receptor or receptor group. These scenarios have been selected from the details provided in Volume 1, Chapter 4: Project Description. Effects of greater adverse significance are not predicted to arise should any other development scenario to that assessed here, based on details within the Project Design Envelope (PDE) (e.g. different foundation option), be taken forward in the final design scheme.

17.9.1.2 The approach to assessing the MDS was different for economic and social impact assessments. While economic impacts were based on the lowest beneficial economic impact which is the area with the least sensitive (e.g. largest and most diversified) economy, the social impacts are based on the most adverse impacts, and therefore the most sensitive (e.g. smallest) local area was selected. As a result, different ports are chosen for each scenario.

Table 17.18: Maximum Design Scenario considered for the assessment of potential impacts on socio-economics

C= construction, O= O&M, D= decommissioning phases

Potential impact	Phase			Maximum Design Scenario	Justification
	C	O	D		
Employment and GVA impacts	✓	✓	✓	**Construction** The employment and GVA impacts for the construction phase were estimated based on the supply chain assumptions set out in the SCDS. The analysis considered the version of the SCDS published in 2023, which considered supply chain expenditure in Scotland, the rest of the UK (rUK) and the European Union (EU). The assessment also considered the potential effects in local areas around the possible construction port(s), identifying Leith as the location expected to have the lowest beneficial economic impacts and Port of Nigg/Cromarty Firth as the locations expected to have the highest adverse social impacts. The analysis of employment impacts also includes a comparison with existing jobs in each of the Study Areas, as requested in the Scoping Opinion. **O&M** The employment and GVA impacts for the O&M phase were estimated based on the SCDS published in 2023, expected to be updated in 2026, which considered supply chain expenditure in Scotland, rUK and the EU. The assessment considered the potential effects in local areas around possible O&M port(s), identifying Aberdeen as the location which is least sensitive to economic impacts and Wick as the location which is most sensitive to social impacts. The analysis of employment impacts also includes a comparison with existing jobs in each of the Study Areas, as requested in the Scoping Opinion.	**Construction** The scale of the project and the SCDS commitments are expected to lead to changes in employment and economic activity in each Socio-Economic Study Area. The SCDS was the basis for the socio-economic assessment, since it is the most reliable source of expenditure associated with Morven North. The nature of jobs generated compared to those already available in each of the Study Areas provides insight into the potential to change the nature of the economic opportunities available, including the quality of jobs and effects on productivity and distributional impacts. **O&M** The scale of the project and the SCDS commitments are expected to lead to changes in employment and economic activity in each Socio-Economic Study Area. The SCDS commitment scenario was the basis for the socio-economic assessment, since it represents lower Scottish and UK supply chain content than the ambition scenario, and therefore lower beneficial employment and GVA impacts. The nature of jobs generated compared to those already available in each of the Study Areas will provide insights into the potential to change the nature of the economic opportunities available, including the quality of jobs and effects on productivity and distributional impacts. **Decommissioning** For the decommissioning phase, it is not yet known the extent to which employment and GVA impacts will be

Potential impact	Phase			Maximum Design Scenario	Justification
	C	O	D		
				Decommissioning The scale and duration of decommissioning activity is uncertain. The exact approach to decommissioning is not yet confirmed as industry practice at the time is not currently known. The MDS assumes all structures above seabed level and dynamic cables within the water column will be removed and that a decommissioning support facility will be located in Scotland.	generated for each Local Socio-Economic Study Area, since it will depend on procurement practices and the structure of the economies of the Study Areas at the time. It is standard practice in economic assessment to discount future benefits so that they are given less weight than benefits that occur sooner. Using the typical discount rate of 3.5% per annum as recommended by HM Treasury (HM Treasury, 2022), a benefit occurring in 40 years' time will be valued at less than a quarter of a benefit of the same scale occurring now. Decommissioning phase employment and GVA impacts were therefore considered to be considerably less valued than the construction and O&M phase employment and GVA impacts.
Demographic changes and demand for housing and other services	✓	✓	✓	**Construction** The demographic changes and demand for housing and other services are related to the employment impact MDS, since the main driver will be labour market demand associated with the employment opportunities created. The assessment of demographic changes and demand for housing and other services was therefore based on the new employment in each of the Local Socio-Economic Study Areas, after taking account of employment that could be secured by the local workforce. **O&M** The demographic changes and demand for housing and other services are related to the employment impact MDS, since the main driver will be labour market demand associated with the employment opportunities created. The assessment of demographic changes and demand for housing and other services was therefore based on the employment impacts in each of the Local Socio-Economic Study Areas.	**Construction** Economic Impacts at the Local Socio-economic Study Area may lead to an increase in local populations in order to meet demand for labour related to economic opportunities. The MDS will be the most sensitive Local Socio-economic Study Area, where the required population increase is the largest. **O&M** Economic Impacts at the Local Socio-economic Study Area may lead to an increase in local populations in order to meet demand for labour related to economic opportunities. The MDS will be the most sensitive Local Socio-economic Study Area, where the required population increase is the largest. **Decommissioning** For the decommissioning phase, it is not yet known the extent to which employment impacts (and therefore associated social impacts) will be generated for each

Potential impact	Phase			Maximum Design Scenario	Justification
	C	O	D		
				Decommissioning The scale and duration of decommissioning activity is uncertain. The exact approach to decommissioning is not yet confirmed as industry practice at the time is not currently known. The MDS assumes all structures above seabed level and dynamic cables within the water column will be removed and that a decommissioning support facility will be located in Scotland.	Socio-Economic Study Area, since it will depend on procurement practices and the structure of the economies of the Study Areas at the time. It is standard practice in economic assessment to discount future costs and benefits so that they are given less weight than costs and benefits that occur sooner. Using the typical discount rate of 3.5% per annum as recommended by HM Treasury (HM Treasury, 2022), a costs or benefit occurring in 40 years' time will be valued at less than a quarter of a core or benefit of the same scale occurring now. Decommissioning phase employment impacts (and so social impacts) were therefore considered to be considerably less valued than the construction and O&M phase employment and social impacts.
Changes to commercial fisheries	✓	✓	✓	The assessment of socio-economic effects on commercial fisheries is based on the identification of significant effects in the conclusion of the commercial fisheries assessment, which takes account of designed-in measures. Where significant effects on commercial fisheries are identified, the socio-economic consequences will be considered, and where none are identified no further assessment will be undertaken.	The socio-economic assessment considered the socio-economic consequences of any significant effects identified in the commercial fisheries assessment (e.g. socio-economic implications from reduced access to fishing grounds).
Changes to shipping and marine recreation	✓	✓	✓	The assessment of socio-economic effects on shipping and marine recreation (e.g. cruise ships) is based on the identification of significant effects in the conclusion of the shipping assessment, which takes account of designed-in measures. Where significant effects on shipping or marine recreation are identified. the socio-economic consequences will be considered, and where none are identified no further assessment will be undertaken.	The socio-economic assessment considered the socio-economic consequences of any significant effects identified in the shipping assessment (e.g. socio-economic implications from reduced access to ports and harbours).

Potential impact	Phase			Maximum Design Scenario	Justification
	C	O	D		
Changes to visitor behaviour	✓	✓	✓	Impacts on visitor behaviour are expected to be localised, for example, if the activities around ports were to change the nature of any nearby visitor attractions (e.g. reducing access to ports, reductions in cruise passengers). The construction port(s), O&M ports and decommissioning are not yet known and so it will not be possible to identify specific impacts on visitor behaviour. However, the MDS is based on research to identify any potential visitor attractions in the vicinity of potential port(s).	The assessment considered the consequences of effects identified on tourism receptors in other effects assessments (e.g. shipping and navigation), which may result in changes in visitor behaviour.

17.10 Designed-in measures and mitigation

17.10.1.1 As part of the project design process, a number of measures (primary and tertiary) have been adopted to reduce the potential for impacts on socio-economics (see Table 17.19). For the purposes of the EIA process, the term 'Designed-in measure' is used to include the following measures (adapted from Institute of Sustainability and Environmental Professionals (ISEP) (formerly Institute of Environmental Management and Assessment (IEMA)) guidance (IEMA, 2016; 2024):

- Measures included as part of the design of Morven North. These include modifications to the location or design of Morven North, which are integrated into the application for consent. These measures are considered standard industry practice for this type of development and are referred to as primary mitigation in IEMA, 2016 and IEMA, 2024;
- Measures required to meet legislative requirements, or actions that are generally standard practice used to manage commonly occurring environmental effects. These measures are secured through the conditions of the marine licences and referred to as tertiary mitigation in IEMA, 2016; 2024.

17.10.1.2 As there is a commitment to implementing these measures, they are considered inherently part of the design of Morven North and have therefore been considered in the assessment presented in Section 17.11 (i.e. the determination of magnitude and therefore significance assumes implementation of these measures).

17.10.1.3 The requirement for any additional mitigation measures is dependent on the significance of the effects on socio-economics. Where significant effects have been identified, further mitigation measures (referred to as secondary mitigation in IEMA, 2016; 2024) have been identified to reduce the significance of effect to acceptable levels following the initial assessment. These are measures that could further prevent, reduce and, where possible, offset any adverse effects on the environment. These measures are set out, where relevant, in Section 17.11.

17.10.1.4 All designed-in measures and mitigation are detailed in Volume 3, Annex 6.3: EIA Commitments Register.

Table 17.19: Designed-in (primary and tertiary) measures adopted as part of Morven North

Reference number	Designed-in measures adopted as part of Morven North	Justification	Primary or tertiary
MM-13	Development of and adherence to a Supply Chain Development Statement	Outlines a set of cost assumptions for Morven North and how these costs may support economic growth within Scotland and the UK. The SCDS provides details of the potential change in nature of the economic opportunities available as a result of Morven North.	Tertiary
MM-42	The Applicant will monitor supply chain expenditure against the SCDS, as required by the CES Option Lease Agreement.	To ensure the commitments outlined in the SCDS – to support economic growth within Scotland and the UK - are being met.	Primary
MM-49	Commit to a Community Engagement Plan once construction and O&M ports have been identified.	To reduce disruption, enhance the economic impacts and reduce impacts on community and social assets.	Tertiary

Reference number	Designed-in measures adopted as part of Morven North	Justification	Primary or tertiary
		This is expected to involve co-ordination with port operator and other offshore wind developers and may include community events and other types of engagement.	
MM-50	Engage with local authorities in the vicinity of construction and O&M ports to support local authority planning.	To reduce the disruption to community and social assets.	Tertiary

17.11 Assessment of significant effects

17.11.1.1 The potential impacts arising from the construction, O&M and decommissioning phases of Morven North are listed in Table 17.18, along with the MDS against which each impact has been assessed.

17.11.1.2 An assessment of the likely significance of the effects of Morven North on socio-economic receptors caused by each identified impact is given below.

17.11.2 Employment and Gross Value Added impacts

17.11.2.1 Throughout the lifetime of Morven North, the activities taking place during the development and construction, O&M and decommissioning phases, which will generate economic impacts in the form of GVA and employment (presented as years of employment for the construction and decommissioning phases and jobs for the O&M phase). Relevant sectors have been identified that will be the primary beneficiary of supply chain contracts from Morven North, have been selected as the appropriate baseline from which to measure changes to the economy.

Construction phase (Scotland and the United Kingdom)

17.11.2.2 The economic impact during the construction phase is generated by increased spend in the economy required to develop and construct Morven North, which includes development, manufacturing and fabrication, and installation. This will generate increased employment (measured in years of employment) and GVA.

Magnitude of impact

17.11.2.3 As discussed in Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report, it is expected that construction related expenditure for Morven North would amount to £2.75 billion of which £657 million would be secured in the UK, and £438 million in Scotland.

17.11.2.4 It was estimated that this expenditure would generate a total economic impact (including direct, indirect and induced impacts) during the construction phase of £303 million GVA and 4,290 years of employment in Scotland and £703 million GVA and 10,300 years of employment in the UK, as shown in Table 17.20. Peak employment, which is represented in terms of jobs as it is a single point, would be 1,400 jobs in Scotland and 2,820 jobs in the UK. More information is provided in Section 3.2, Volume 3, Annex 17.1: Socio-Economics Shared Economics Technical Report.

Table 17.20: Construction of Morven North: Employment and Gross Value Added impacts, Scotland and the UK

	Scotland	UK
Total GVA (£m)	£303 million	£703 million
Total employment (Years of employment)	4,290	10,300
Peak employment	1,400	2,820

17.11.2.5 To consider the types of jobs that would be created by Morven North, an analysis of employment by occupation was undertaken, based on the sectors that would be supported (e.g. jobs in development would be associated with more employment in professional occupations). This found that the main type of occupation supported would be skilled trades occupation, which would be expected to make 38% of employment in Scotland and 41% of employment in the UK, compared to an average of 10% across the UK economy as a whole.

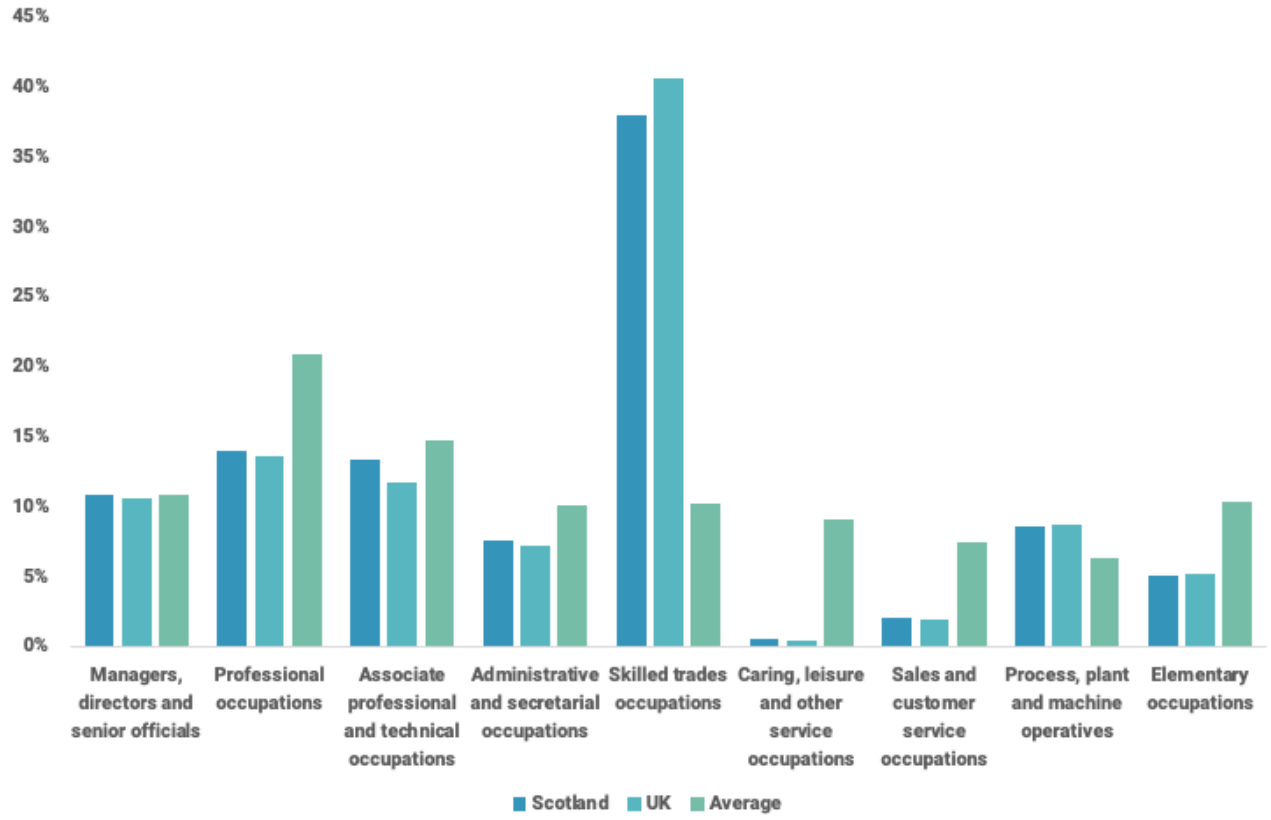

Figure 17.7: Morven North development and construction, direct employment by occupation

17.11.2.6 The relevant sectors employ 228,500 in Scotland (Section 17.7.1). Given that peak employment from the construction activities of Morven North could result in 1,400 jobs, this would result in a 0.6% change in employment in these relevant sectors. As this change represents a change equal to or greater than 0.5% (but lower than 1.0%) and is during the construction phase, the magnitude is therefore considered to be temporary medium beneficial.

17.11.2.7 The UK employment in relevant sectors has a higher employment compared to Scotland (2.3 million, Section 17.7.1). As peak employment represents a change lower than 0.25% of UK employment in relevant sectors, the magnitude of impact is therefore considered to be temporary negligible beneficial.

Sensitivity of the receptor

17.11.2.8 The sensitivity of the receptor depends on the receptor's ability to adapt to change. This ability is a function of different characteristics which can enable a receptor a higher degree of adaptability, and these factors include the size of the economy (changes to larger economies have proportionally less change than to smaller economies), the diversification of its economy (economies highly reliant on a single sector will face difficulties adapting to changes), and growth trajectory (a declining job market is more affected by new job creation).

17.11.2.9 Scotland is a large and diversified economy, employing over 2.6 million people (Table 17.8) and experienced a 7.9% increase in employment from 2013 to 2023 (Table 17.9). The sensitivity of the receptor (Scottish economy) is therefore considered to be low.

17.11.2.10 The UK is large, diversified and growing (Table 17.8, Table 17.9), it is likely that any changes to the UK economy will be able easily absorbed and economic impacts would not be able to change the fundamental characteristics of the economy. The sensitivity of the receptor (UK economy) is therefore considered to be negligible.

Significance of the effect

17.11.2.11 Overall, for the Scottish economy, the magnitude of the impact is deemed to be medium and the sensitivity of the receptor is considered to be low. The effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms.

17.11.2.12 Overall, for the UK economy, the magnitude of the impact is deemed to be negligible and the sensitivity of the receptor is considered to be negligible. The effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.

Secondary mitigation and residual effect

17.11.2.13 No mitigation measures for economic impacts in Scotland and the UK are considered necessary because the likely effect in the absence of further mitigation (beyond the designed-in measures outlined in Table 17.19) is beneficial.

Construction phase (Local Socio-Economic Study Area)

17.11.2.14 Some of the construction spend will take place in the Local Socio-Economic Study Area, namely activities such as marshalling and assembly which will lead to changes in GVA and employment.

17.11.2.15 While the Applicant has not decided which port(s) will be used throughout the construction phase of Morven North, there is a likelihood that it will be one of the ports identified in Table 17.1, which can accommodate the marshalling and assembly activities required for the construction of an offshore windfarm. For the MDS, this would occur in the Local Socio-Economic Study Area with the highest employment as this would result in the lowest magnitude of beneficial economic impact because this area is the least sensitive to changes in the economy.

17.11.2.16 As the Aberdeen Local Socio-Economic Study Area has the highest employment in relevant sectors from the list of potential port locations suitable for construction related activities (Table 17.10), it has been chosen for the assessment of significance.

Magnitude of impact

17.11.2.17 It was estimated that the construction port could secure contracts worth £133 million. This could support a total of 670 years of employment across the construction phase, with a peak employment of 310 jobs, as shown in Table 17.21.

Table 17.21: Construction of Morven North: Employment and Gross Value Added impacts, construction port

	Expenditure	Total employment	Peak employment
Total	£133 million	670 (direct)	310 (direct)

17.11.2.18 A peak employment of 310 represents 1% of the workforce in relevant sectors the Local Socio-Economic Study Area that contains Aberdeen. As this change is 1%, the magnitude of impact for the construction Local Socio-Economic Study Area the magnitude is therefore considered to be high.

Sensitivity of the receptor

17.11.2.19 As with the sensitivity of the Scottish and UK economy, the sensitivity of the Local Socio-Economic Study Area will be its ability to adapt to change. The factors that determine the sensitivity of the indicative port locations will focus particularly on the size of its economy and its reliance on specific sectors.

17.11.2.20 The Local Socio-Economic Study Area that contains Aberdeen has a total workforce of 210,585, including employment in relevant sectors of 35,910. (Table 17.10). The Local Socio-Economic Study Area that includes the City of Aberdeen and has a large workforce in relevant sectors. Therefore, the sensitivity of the Aberdeen Local Socio-Economic Study Area economy is therefore considered to be low.

Significance of the effect

17.11.2.21 Overall, for the Local Socio-Economic Study Area that contains Aberdeen, the magnitude of impact is deemed to be high and the sensitivity of the receptor is considered to be low. The effect will, therefore, be of **moderate beneficial** significance, which is significant in EIA terms. Moderate significance was selected since the economy is relatively small within the scale of the Scottish economy and is experiencing a transition away from oil and gas.

Secondary mitigation and residual effect

17.11.2.22 No mitigation measures for economic impacts at the construction port are considered necessary because the likely effect in the absence of further mitigation (beyond the designed-in measures outlined in Table 17.19) is beneficial.

Operation and Maintenance phase: Scotland and the United Kingdom

17.11.2.23 The economic impact during the O&M phase is generated by the increased spend in the economy required to operate and maintain Morven North. This generates increased GVA and employment.

Magnitude of impact

17.11.2.24 From the SCDS it was estimated that the annual O&M expenditure for Morven North could be £19 million annually in the UK and £10 million annually in Scotland. It was therefore calculated that the annual economic impact (including direct, indirect and induced impacts) during the O&M phase could be £6 million GVA and 80 jobs in Scotland, and £18 million GVA and 230 jobs in the UK, as shown in Table 17.22.

Table 17.22: Operation and Maintenance of Morven North: Annual employment and Gross Value Added impacts, Scotland and United Kingdom

	Scotland	UK
GVA	£6 million	£18 million
Employment	80	230

17.11.2.25 To consider the types of jobs that would be created by Morven North during the O&M phase, an analysis of employment by occupation was undertaken, based on the sectors that would be supported. This found that the main type of occupations which are expected to be supported include professional occupations (29% in Scotland and the UK, compared to 21% across the economy) and skilled trades occupation (22% and 23% in Scotland and the UK, compared 10% across the economy.

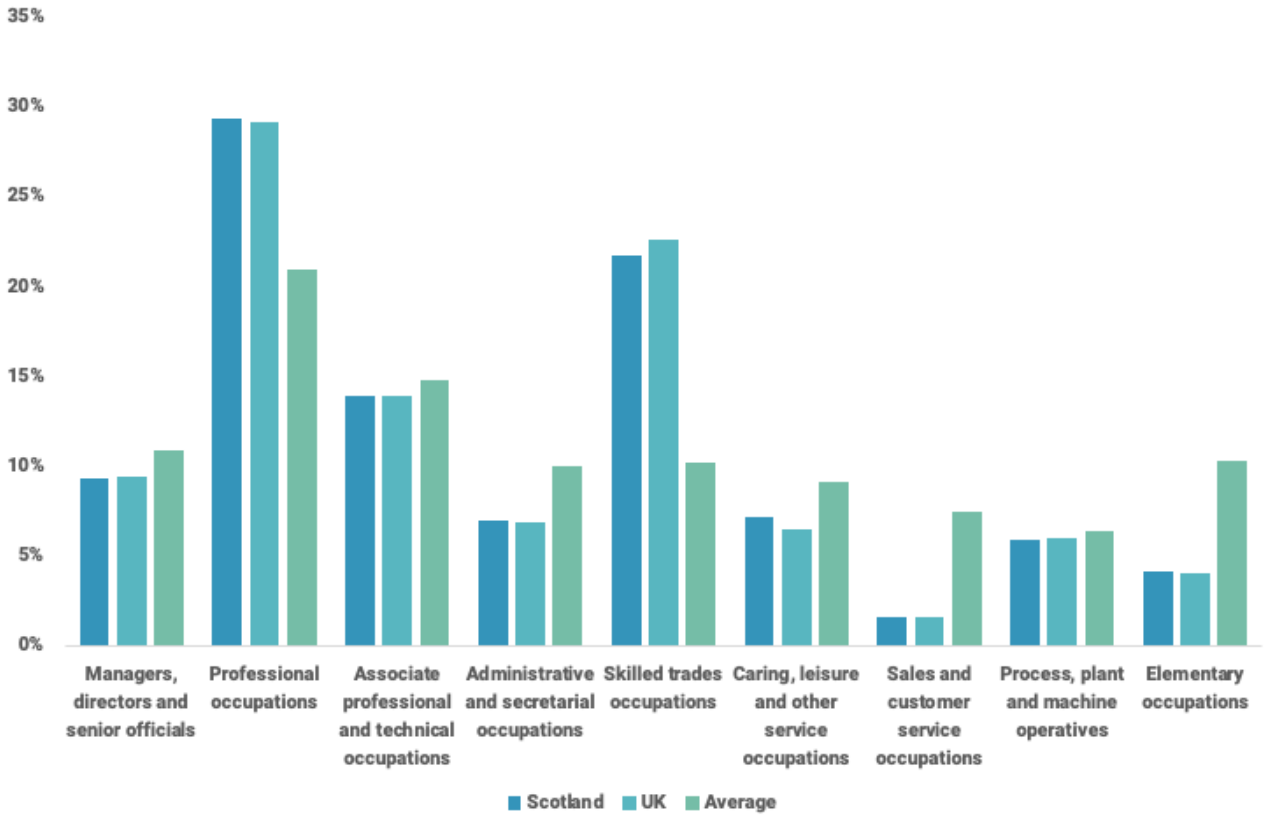

Figure 17.8: Morven North operations and maintenance, direct employment by occupation

17.11.2.26 The annual O&M impact in Scotland, estimated at 80 jobs per year, represents 0.1% of Scottish employment in relevant sectors (228,000, Section 17.7.1) and falls under 0.25%. The magnitude is therefore considered to be negligible beneficial.

17.11.2.27 The annual O&M impact in the UK, estimated at 230 jobs per year, would represent less than 0.1% of the UK's construction sector total employment (2.3 million, Section 17.7.1) and falls below 0.25%. The magnitude is therefore considered to be negligible beneficial.

Sensitivity of the receptor

17.11.2.28 Similar to the construction phase of Morven North, the sensitivity of the Scottish economy is considered to be low due its size, diversification and growth, and the sensitivity of the UK economy is considered to be negligible.

Significance of the effect

17.11.2.29 The sensitivity of the Scottish economy is considered to be low and the magnitude of impact has been assessed as negligible. The effect will therefore be **negligible beneficial**, which is not significant in EIA terms. Negligible significance has been chosen as the employment impact is considerably below the threshold for low magnitude (0.25%).

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

Secondary mitigation and residual effect

17.11.2.31 No mitigation measures for economic impacts in Scotland and the UK are considered necessary because the likely effect in the absence of further mitigation (beyond the Designed-in measures outlined in Table 17.19) is beneficial.

Operation and Maintenance phase (Local Socio-Economic Study Area)

17.11.2.32 Some of the O&M expenditure will take place in the O&M socio-economic local area, which is expected to result in changes to GVA and employment. As Aberdeen has the largest workforce from the list of indicative port locations suitable for O&M related activities (Table 17.10), it has been chosen for the assessment of significance.

Magnitude of impact

17.11.2.33 The O&M port could secure contracts worth £8 million per annum, which is expected to support a total of 36 jobs, as shown in Table 17.23.

Table 17.23: Operation and Maintenance Morven North: Annual employment and Gross Value Added impact, operations and maintenance port

	Annual Expenditure	Annual Employment
Total	£8 million	36

17.11.2.34 The annual employment from O&M activities of Morven North is therefore expected to account for less than 0.1% of Aberdeen's relevant employment (Table 17.23). As the change is less than 0.25%, the magnitude of impact on the Aberdeen Local Socio-Economic Study Area has been assessed as negligible.

Sensitivity of the receptor

17.11.2.35 The Aberdeen Local Socio-Economic Study Area has a total workforce of 210,585, including a workforce in relevant sectors of 35,910. Given the size and diversity of the economy its sensitivity has been assessed as low.

Significance of the effect

17.11.2.36 The sensitivity of Aberdeen Local Socio-Economic Study Area's economy is considered to be low and the magnitude of impact has been assessed as negligible, the effect will therefore be **negligible**

beneficial, which is not significant in EIA terms. Negligible significance has been chosen as the employment impact is considerably below the threshold for low magnitude (0.25%).

Secondary mitigation and residual effect

17.11.2.37 No mitigation measures for economic impacts at the O&M port are considered necessary because the likely effect in the absence of further mitigation (beyond the Designed-in measures outlined in Table 17.19) is beneficial.

Decommissioning phase (Scotland and the United Kingdom)

17.11.2.38 The economic impact during the decommissioning phase is generated by the increased spend in the economy required to decommission Morven North at the end of its operational life. This will generate increased GVA and employment.

17.11.2.39 Given that the decommissioning will take place at the end of the operational lifespan there is a high degree of uncertainty on the expenditure associated with decommissioning, as well as how much expenditure would take place in Scotland and the UK. The assumptions for decommissioning have been sourced from BVG Associates (2021, 2024) to determine the spend and location of expenditure.

Magnitude of impact

17.11.2.40 It is anticipated that £75 million of decommissioning expenditure would be secured in the UK, all of which is anticipated to be secured in Scotland. It was therefore estimated that the total economic impact from decommissioning Morven North could be £39 million GVA and 480 years of employment in Scotland, and £60 million GVA and 730 years of employment in the UK. Assuming a two-year decommissioning period, peak employment could be 240 jobs in Scotland and 360 jobs in the UK.

Table 17.24: Decommissioning Morven North: Employment and Gross Value Added impact, Scotland and United Kingdom

	Scotland	UK
GVA	£39 million	£60 million
Total employment (years of employment)	480	730
Peak employment	240	360

17.11.2.41 The peak decommissioning impact in Scotland, estimated at 240 jobs, which represents just over 0.1% of the Scottish employment in relevant sectors (228,500, Section 17.7.1) and as that is lower than 0.25%, the magnitude has been assessed as negligible.

17.11.2.42 The peak decommissioning impact in the UK, estimated at 360 jobs, would represent less than 0.1% of the UK's employment in relevant sectors (2.3 million, Section 17.7.1), as that is lower than 0.25% the magnitude has been assessed as negligible.

Sensitivity of the receptor

17.11.2.43 Similar to the construction phase of Morven North, the sensitivity of Scotland has been assessed as low and the sensitivity of the UK has been assessed as negligible.

Significance of the effect

17.11.2.44 The sensitivity of the Scottish economy is considered to be low and the magnitude of impact has been assessed as negligible. The effect will therefore be **negligible beneficial**, which is not significant in

EIA terms. Negligible significance has been chosen based on the large size and diversity of the Scottish economy.

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

Secondary mitigation and residual effect

17.11.2.46 No mitigation measures for economic impacts in the Scottish and UK economy are considered necessary because the likely effect in the absence of further mitigation (beyond the Designed-in measures outlined in Table 17.19) is beneficial.

Decommissioning phase (Local Socio-Economic Study Area)

17.11.2.47 It is possible that a share of the decommissioning spend will take place at a decommissioning port, generating local economic impacts. Given the long timescales, there is a high degree of uncertainty about the port that will be selected and the level of economic impact at the decommissioning port.

17.11.2.48 As the impacts are likely to be similar in nature (e.g. short-term) to those at the construction port, but lower, the same approach to port selection has been applied for decommissioning (i.e., the Local Socio-Economic Study Area that is the least sensitivity to change has been considered). On this basis, the Local Socio-Economic Study Area would be Aberdeen.

Magnitude of impact

17.11.2.49 It is likely that the impacts in the Local Socio-Economic Study Area associated with decommissioning will be lower than those associated with construction, with the peak employment in Scotland during the decommissioning phase (240 jobs) being around 20% of the peak employment in Scotland during the construction phase (1,200 jobs).

17.11.2.50 Given peak employment at the construction phase of 310 jobs in the Local Socio-Economic Study Area (equal to 1% of construction employment) that would imply that there could be 60 jobs created during the decommissioning phase in the Local Socio-Economic Study Area, equal to 0.2% of construction employment in the Local Socio-Economic Study Area. This is therefore considered to be of negligible magnitude.

Sensitivity of receptor

17.11.2.51 As with the sensitivity of the Scottish and UK economy, the sensitivity of the Local Socio-Economic Study Area will be related to its ability to adapt to change. The factors that will be particularly important are the size of its economy and its reliance on specific sectors.

17.11.2.52 The Local Socio-Economic Study Area that contains Aberdeen has a total workforce of 210,585, including employment in relevant sectors of 35,910. (Table 17.10). The Local Socio-Economic Study Area that includes Aberdeen has a substantial workforce in relevant sectors. Therefore, the sensitivity of the Local Socio-Economic Study Area economy is therefore considered to be low.

Significance of the effect

17.11.2.53 Overall, for the Local Socio-Economic Study Area that contains Aberdeen, the magnitude of impact is deemed to be negligible and the sensitivity of the receptor is considered to be low. The effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms. Negligible significance has been chosen given the relative uncertainty and the lower preference given for economic impacts in the distant future.

Secondary mitigation and residual effect

17.11.2.54 No mitigation measures for economic impacts in the Local Socio-Economic Study Area are considered necessary because the likely effect in the absence of further mitigation (beyond the designed-in measures outlined in Table 17.19) is beneficial.

17.11.3 Demographic changes and demand for housing and other services

17.11.3.1 Population change is considered the primary driver of social impacts (including demographics, housing demand and availability, local services, and socio-cultural factors). Demographic changes are one of the primary pathways through which Morven North could lead to social impacts, as part of the construction, O&M and decommissioning phases. This impact arises from new people moving into an area as a result of employment opportunities created throughout the lifetime of Morven North.

17.11.3.2 The extent to which the economic impacts lead to noticeable population changes will be related to the proportion of employment taken up by those already resident in the Local Socio-Economic Study Area and the proportion taken up by those moving to the Local Socio-Economic Study Area. The greatest change would be in the circumstances where all of the employment was taken by new residents and where a substantial proportion of these residents also moved with family members.

17.11.3.3 However, where there is an existing workforce in relevant sectors in the Local Socio-Economic Study Area, many of the employment opportunities will be taken up by existing residents. This will be particularly the case where relevant sectors may be seeing declining employment levels, notably in the oil and gas sector. The Local Socio-Economic Study Area for Scapa Deep Water Quay has the lowest numbers of people employed in relevant sectors (1,375), not surprisingly since this is also the Local Socio-Economic Study Area with the lowest population.

17.11.3.4 It is not anticipated that Morven North will lead to changes at the Scottish or UK level, so the assessment of demographic changes and subsequent social impacts (changes in housing demand, changes to other local public and private services and socio-cultural impacts) are focused on changes related to the impact around epicentres of impact, such as the construction and O&M ports.

17.11.3.5 As these have not yet been selected, it was necessary to determine the MDS, which was taken as the case where the Local Socio-Economic Study Area population is smallest and therefore most sensitive to change, based on the potential port locations in Table 17.1. While this may not be the port selected by the Applicant, any other port is likely to be less sensitive to change and experience less adverse impacts.

17.11.3.6 For both the construction phase and the O&M phase, the most sensitive Local Socio-economic Study Area has been defined as Orkney (the Local Socio-Economic Study Area for Scapa Deep Water Quay).

Construction phase

Magnitude of impact

17.11.3.7 The economic analysis estimates that during the construction phase, there could be a peak workforce of up to 310 people at the construction port. However, not all of these jobs would be taken up by new workers, with people in relevant sectors able to take up employment. In Orkney (the Local Socio-Economic Study Area for Scapa Deep Water Quay), there were 1,375 people employed in relevant sectors, mainly in construction. It was assumed that up to 20% of these people would be able to work at the construction port without substantially distorting the local labour market, giving a supply of 275 local employees. On this basis, 35 new employees could be needed.

17.11.3.8 Based on an assumption of a change in population of two for every job, to allow for some employees moving with family members, this would imply an increase in population of up to 70 during peak construction.

17.11.3.9 Given Orkney's population of 22,030, a population increase of 120 would represent a 0.3% population increase. This is within the thresholds for low magnitude (between 0.25% and 0.5% of the population). The magnitude is therefore considered to be low.

17.11.3.10 Embedded mitigation measures include a Community Engagement Plan and engagement with authorities in the vicinity of construction and O&M ports (as described in Table 17.19).

Sensitivity of the receptor

17.11.3.11 Sensitivity is considered in terms of the capacity of the local area to accommodate changes in population, as people move to the area to take up employment opportunities. The indicative port location with the smallest population is treated as the most sensitive, representing the MDS for assessment purposes.

17.11.3.12 The Local Socio-Economic Study Area for Scapa Deep Water Quay has the smallest population of the indicative construction port locations and has therefore been identified as the most sensitive. Given the Scapa Deep Water Quay Local Socio-Economic Study Area's small population of 22,030, it may have difficulty in absorbing changes to its population, as well as the knock-on impacts on housing and services such as education and health. The sensitivity of the receptor is therefore, considered to be high.

Significance of the effect

17.11.3.13 Overall, for the Local Socio-Economic Study Area for Scapa Deep Water Quay, the magnitude of impact is deemed to be low and the sensitivity of the receptor is considered to be high. The effect will, therefore, be of **minor adverse** significance, which is not significant in EIA terms. Minor significance has been chosen, since the magnitude of impact is on the lower end of threshold for an assessment of low magnitude.

Secondary mitigation and residual effect

17.11.3.14 No mitigation measures for social impacts at the construction port are considered necessary because the likely effect in the absence of further mitigation (beyond the designed-in measures outlined in Table 17.19) is not significant in EIA terms.

Operations and Maintenance phase

Magnitude of impact

17.11.3.15 Population change is considered the primary driver of social impacts (including demographics, housing demand and availability, local services, and socio-cultural factors). Therefore, the magnitude of these social impacts will be linked to the expected increase in population.

17.11.3.16 In Scotland's rural areas, it would be expected that the opportunity for high-level local jobs could encourage individuals that had left the area for economic opportunities elsewhere to return. This could increase the number of working-age residents in rural areas and benefit long-term demographics, as well as supporting investment in new housing and services, such as schools. This is expected to be beneficial given the challenges faced by rural and island communities in attracting people and sustaining their populations, though this may be experienced as adverse if there is no accompanying investment.

17.11.3.17 The economic analysis estimates that during the O&M phase, a workforce of up to 36 people could be required to fulfil contracts at the O&M port, and this would be a long-term increase in employment. In the Local Socio-Economic Study Area for Scapa Deep Water Quay, there were 1,375 people employed in relevant sectors, mainly in construction and therefore it was assumed that the existing workforce could take on these jobs. As a result, no new population would be attracted, though in practice some people may be retained who would otherwise have left.

17.11.3.18 Based on the criteria set out in Table 17.14, the magnitude is considered to be negligible.

Sensitivity of the receptor

17.11.3.19 As with the assessment of the construction port(s), the indicative port location with the smallest population is treated as the most sensitive, representing a MDS for assessment purposes.

17.11.3.20 The Local Socio-Economic Study Area for Scapa Deep Water Quay has the smallest population of the indicative O&M port locations and has therefore been identified as the most sensitive. With a total population of 22,030 people, the sensitivity of the receptor is considered to be high.

Significance of the effect

17.11.3.21 Overall, for the Local Socio-Economic Study Area for Scapa Deep Water Quay, the magnitude of impact is deemed to be negligible and the sensitivity of the receptor is considered to be high. The effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms.

Secondary mitigation and residual effect

17.11.3.22 No mitigation measures for social impacts at the O&M port are considered necessary because the likely effect in the absence of further mitigation (beyond the designed-in measures outlined in Table 17.19) is not significant in EIA terms.

Decommissioning phase

17.11.3.23 As well as generating economic impacts in each of the Study Areas considered, Morven North may have economic impacts on the decommissioning port. The resulting social impacts during the decommissioning phase are likely to be similar in nature to the impacts arising during the construction phase, but smaller in magnitude (assessed as negligible).

17.11.3.24 The effect during the construction phase was assessed as minor adverse and not significant. Given that economic impacts and the magnitude of change are expected to be smaller during decommissioning, significant effects on population and social receptors are not anticipated during the decommissioning phase.

17.11.4 Changes to commercial fisheries

17.11.4.1 Volume 2, Chapter 12: Commercial Fisheries has considered the potential effects on commercial fishing across the construction, O&M and decommissioning phases. Socio-economic consequences could occur if Morven North leads to a reduction in the value of fish caught by commercial fisheries, with potential downstream impacts, for example on fish processors.

17.11.4.2 The assessment presented in Volume 2, Chapter 12: Commercial Fisheries considered a range of impacts, including reduction in access to, or exclusion from established fishing grounds, displacement leading to gear conflict and increased fishing pressure on adjacent grounds, disturbance of commercially important fish and shellfish resources, increased vessel traffic leading to interference with fishing activity, additional steaming time to alternative fishing grounds, and increased snagging risk. This was assessed for a range of fishing receptors, including pelagic, demersal seine and demersal trawl (targeting mainly haddock, other whitefish and *Nephrops*, a type of lobster), scallop dredging and potting vessels (mainly lobster and brown crab).

17.11.4.3 No significant residual effects on commercial fisheries were identified during the construction, O&M and decommissioning phases. Therefore, no significant secondary socio-economic effects on commercial fisheries are expected to occur due to Morven North.

17.11.5 Changes to shipping and marine recreation

17.11.5.1 Volume 2, Chapter 13: Shipping and Navigation has considered the potential effects on shipping and navigation across the construction, O&M and decommissioning phases. Such effects could have socio-

economic consequences if they result in increased transit times and thus higher costs, which could lead to wider socio-economic consequences if increased costs are passed on to consumers or exporters in Scotland.

17.11.5.2 The shipping and navigation assessment considered a number of potential effects such as increased risk of vessel to vessel collision resulting from displacement, increased risk of vessel to structure allision, reduced access to local ports and harbours, reduction of under keel clearance, anchor and fishing gear interactions with subsea cables and reduction in search and rescue capability. No significant residual effects on shipping and navigation were identified during the construction, O&M and decommissioning phases.

17.11.5.3 Similarly, effects on marine recreation are assessed as part of the Volume 2, Chapter 16: Other Sea Users and Communications, and these could have socio-economic consequences if they affect visitor behaviour. No significant residual effects on marine recreation were identified during the construction, O&M and decommissioning phases.

17.11.5.4 On this basis, no significant secondary socio-economic effects on shipping and marine recreation are expected to occur due to Morven North.

17.11.6 Changes to visitor behaviour

17.11.6.1 Given the distance of Morven North from the shore, seascape and visual impacts were scoped out and no significant effects were identified within Volume 2, Chapter 13: Shipping and Navigation or Volume 2, Chapter 16: Other Sea Users and Communications. On this basis, no significant secondary socio-economic effects on visitor behaviour are expected to occur due to Morven North.

17.11.7 Proposed monitoring

17.11.7.1 This section outlines the proposed monitoring proposed for socio-economics. Proposed monitoring measures are outlined in Table 17.25 below, in line with best practice and the designed-in measures.

Table 17.25: Monitoring commitments for socio-economics

Potential environmental effect	Monitoring commitment	Means of implementation
Employment and GVA impacts	Monitor supply chain expenditure against the SCDS, as required by the CES Option Lease Agreement.	This is committed to within the SCDS, which has been secured through the Option Lease Agreement
Demographic changes and demand for housing and other services	Engage with local authorities in the vicinity of construction and O&M ports to support local authority planning.	Detailed monitoring commitments will be agreed post consent and are likely to include community engagement events. This is expected to involve co-ordination with port operator and other offshore wind developers.

17.12 Whole project assessment and Cumulative Effects Assessment methodology

17.12.1 Methodology

17.12.1.1 The Morven Programme comprises four distinct projects: Morven North, Morven South, Morven Hawthorn Pit Grid Connection Project (MHPGC Project), and Morven Branxton Area Grid Connection Project (MBAGC Project).

17.12.1.2 The following assessment scenarios have been considered to identify the Likely Significant Effects (LSE[1]) of Morven North in combination with other projects on the same receptor, as follows (and summarised in Table 17.26):

- Whole project assessment: to identify the potential impacts associated with Morven North together with each grid connection option in turn, (Scenario 1: MHPGC and Scenario 2: MBAGC Project), each of which would comprise a "Whole Project";
- Morven Programme assessment: to identify potential impacts associated with all four components of the Morven Programme together with relevant third-party projects, plans and activities (Scenario 3);
- Cumulative Effects Assessment (CEA): to identify the potential impacts associated with Morven North together with other relevant projects, plans and activities including other components of the Morven Programme, using a tiered approach (Scenario 4).

17.12.1.3 The whole project assessment and CEA have been undertaken in accordance with the methodology described in Volume 1, Chapter 6: EIA Methodology.

Table 17.26: Scenarios to be considered in the Morven North whole project assessment and Cumulative Effects Assessment for socio-economics

Whole project assessment		Morven Programme assessment (Offshore Ornithology and Shipping and Navigation chapters only)	Cumulative Effects Assessment
Scenario 1	**Scenario 2**	**Scenario 3**	**Scenario 4**
Morven North + MHPGC Project	Morven North + MBAGC Project	Morven North + Morven South + MHPGC Project + MBAGC Project	Morven North + Morven South + MHPGC Project + MBAGC Project + Tier 1, Tier 2 and Tier 3 Plans/Projects screened in

17.12.1.4 For the purposes of this socio-economics chapter, Scenarios 1, 2, and 4 have been taken forward for assessment; Scenario 3 has not been included as it is not applicable to this chapter. As discussed in Volume 1, Chapter 6: EIA Methodology, the Morven Programme assessment (Scenario 3) is only required for specific chapters to provide further context to, and to support, the conclusions of the CEA scenario (Scenario 4), in agreement with the relevant stakeholders for these topics. As Scenario 3 does not form the basis of the CEA conclusions, it is considered a supplementary assessment to the CEA scenario (Scenario 4) for these specific topics. The approach to cumulative effects assessment presented in this socio-economics chapter complies with the requirements under the EIA Regulations to assess the LSE[1] on the environment arising from a project cumulatively with other relevant plans, projects and activities, and no supplementary

assessment of the Morven Programme (Scenario 3) is required or has been requested by relevant stakeholders with regard to socio-economics.

17.12.1.5 The projects and plans selected as relevant to the CEA presented within this chapter are based upon the results of a screening exercise (see Volume 3, Annex 6.1: Cumulative Effects Screening). Each project or plan has been considered on a case-by-case basis for screening in or out of this chapter's assessment based upon data confidence, effect-receptor pathways and the spatial/temporal scales involved.

17.12.1.6 In undertaking the CEA for Morven North, it should be noted that other projects and plans under consideration will have differing potential for proceeding to an operational stage and hence a differing potential to ultimately contribute to a cumulative impact alongside Morven North. Therefore, a tiered approach has been adopted, whereby all third-party projects and plans considered have been allocated into 'tiers' reflecting their current stage within the planning and development process. This provides a framework for placing relative weight upon the potential for each project/plan included in the CEA to ultimately be realised, based upon the project/plan's current stage of maturity and certainty in the project/plan's parameters. The tiered approach utilised within the Morven North CEA employs the following tiers:

- Tier 1 assessment – Existing developments either built (operational) or under construction[4]; approved developments awaiting implementation; and permitted/submitted application(s) but not yet determined;
- Tier 2 assessment – All plans/projects assessed under Tier 1, and plans/projects where a scoping report has been submitted and is in the public domain;
- Tier 3 assessment – All plans/projects assessed under Tier 1 and 2, plus plans/projects that are reasonably foreseeable (e.g. projects identified in development plans, projects in other plans and programmes, offshore renewable energy projects that have a Crown Estate Scotland Option Lease Agreement).

17.12.1.7 The specific projects and plans screened into the CEA for socio-economics are outlined in Table 17.27.

17.12.1.8 The potential impacts that have been considered in the CEA (listed in Table 17.28) is a subset of those considered for the Morven North alone assessment. This is because some of the potential impacts identified and assessed for the Morven North alone assessment are localised and temporary in nature or have been assessed to have negligible significance. It is considered therefore, that these potential impacts have limited or no potential to interact with similar changes associated with other plans or projects. These have therefore been scoped out of the whole project and cumulative effects assessment. These impacts include:

- Demographic changes and demand for housing and other services (decommissioning phase) – no impact has been considered since no significant effects have been identified;
- Changes to commercial fisheries;
- Changes to shipping and marine recreation;
- Changes to visitor behaviour.

[4] Note that existing developments are included in Tier 1 CEA long list but are generally screened out of the CEA assessments, aside from the following exceptions:

1) Existing developments which were not present at the time of baseline characterisation, where a potential cumulative impact-receptor pathway has been identified.

2) Existing developments are screened into tier 1 assessments for specific topics where there is a large conceptual, temporal and spatial overlap between project impacts. In these instances, the potential for ongoing effects through cumulative impact-receptor pathways throughout project lifetime, across the development phases, means that they are considered within quantitative assessment for these topic CEAs (e.g., offshore ornithology assessments consider the cumulative effects of operational offshore wind farms).

Table 17.27: List of other projects and plans considered within the Cumulative Effects Assessment for socio-economics

Project Name	Status [i.e. Application, Consented, Under Construction, Operational]	Distance from Morven North (km)	Description of project/plan	Estimated dates of construction (If applicable)	Estimated dates of operation (If applicable)	Overlap with Morven North [e.g. Project construction phase overlaps with Morven North construction phase]
Tier 1						
Morven South	Application Submitted/Awaiting Decision	0	Proposed for up to 95 wind turbines with a capacity of up to 1,500 Megawatt (MW).	2033 to 2042	2038 to 2077	Yes
Berwick Bank OWF; Five Estuaries OWF; Forthwind Demonstration Project; Mona Offshore Wind Project; Morecambe Offshore Wind Farm; West of Orkney Wind Farm.	Consented	n/a	Six offshore wind farms with a combined capacity of 7.9GW.	2025-2032	2030 onwards	Construction and O&M phases interact with construction and O&M phases of Morven North
INTOG: Aspen OWF; Buchan OWF; Caledonia North Offshore Wind Farm;	Application Submitted/Awaiting Decision	n/a	Eight offshore wind farms with a combined capacity of 11.2GW	2026-2038	2028 onwards	Construction and O&M phases interact with construction and O&M phases of Morven North

Project Name	Status [i.e. Application, Consented, Under Construction, Operational]	Distance from Morven North (km)	Description of project/plan	Estimated dates of construction (If applicable)	Estimated dates of operation (If applicable)	Overlap with Morven North [e.g. Project construction phase overlaps with Morven North construction phase]
Caledonia South Offshore Wind Farm; INTOG: Cenos OWF; Dogger Bank South (East and West); Muir Mhòr OWF; Ossian OWF.						
Tier 2						
MHPGC Project	Consenting/Pre-Construction	0	MHPGC Project is a grid connection in County Durham	Unknown	Unknown	Yes
Arven OWF; Bellrock Offshore Wind Farm; Broadshore OWF; Bowdun OWF; Dogger Bank D OWF; MarramWind OWF; MachairWind OWF; INTOG: Scaraben OWF;	Consenting/Pre-Construction	n/a	11 offshore wind farms with a combined capacity of 13.8GW	2026-2036	2030 onwards	Construction and O&M phases interact with construction and O&M phases of Morven North

Project Name	Status [i.e. Application, Consented, Under Construction, Operational]	Distance from Morven North (km)	Description of project/plan	Estimated dates of construction (If applicable)	Estimated dates of operation (If applicable)	Overlap with Morven North [e.g. Project construction phase overlaps with Morven North construction phase]
ScotWind 1, Site 18: Arven OWF; ScotWind 1, Site 15: Talisk Offshore Wind; Stromar OWF.						
Tier 3						
MBAGC Project	In planning	0	MBAGC Project is a proposed grid connection in East Lothian	Unknown	Unknown	Yes
Eastern Regions Zone; Havbredey OWF; INTOG: Sinclair OWF; INTOG: Flora OWF; INTOG: Malin Sea Wind; INTOG: Beech OWF; INTOG: Cedar OWF; INTOG: HE South (Judy);	Consenting/Pre-Construction	n/a	12 offshore wind farms with a combined capacity of 10.1GW	2026-2035	2028 onwards	Construction and O&M phases interact with construction and O&M phases of Morven North

Project Name	Status [i.e. Application, Consented, Under Construction, Operational]	Distance from Morven North (km)	Description of project/plan	Estimated dates of construction (If applicable)	Estimated dates of operation (If applicable)	Overlap with Morven North [e.g. Project construction phase overlaps with Morven North construction phase]
Northland Mhairi Offshore Wind Farm; ScotWind 1, Site 13: Offshore Wind Power Fixed (west of Orkney); ScotWind 1, Site 20: ESB Asset Development: Stoura OWF; North/Southland Sheena Offshore Wind Farm (Spiorad na mara).						

17.12.2 Maximum Design Scenario

17.12.2.1 The cumulative MDSs identified in Table 17.28 have been selected as those having the potential to result in the greatest potential cumulative effect on an identified receptor or receptor group. The cumulative MDSs have been based on the Morven North alone assessment MDS (Table 17.18), the Morven South alone assessment MDS, the Project Description contained within the MHPGC Project Scoping Report and project information available for MBAGC Project, as well as publicly available information on other third party projects and plans that have been screened into the CEA (Table 17.27).

Table 17.28: Maximum Design Scenario considered for the assessment of potential whole project and cumulative effects on socio-economics

C= Construction, O= Operations and maintenance, D= Decommissioning phases

"✓" is used to denote the phase the potential impact can occur, "X" outlines there is no impact within this project phase

Potential cumulative effect	Phase			Maximum Design Scenario	Justification
	C	O	D		
Employment and GVA impacts	✓	✓	✓	**Scenario 1** MDS as described for Morven North (Table 17.18), assessed cumulatively with MHPGC Project. **Scenario 2** MDS as described for Morven North (Table 17.18), assessed cumulatively with MBAGC Project. **Scenario 4** MDS as described for Morven North (Table 17.18), assessed cumulatively with Morven South, MHPGC Project and MBAGC Project and the following other projects and plans: **Tier 1** • 6 consented offshore wind farms (9.2GW) • 9 offshore wind farms with applications submitted (10.2GW) **Tier 2** • 14 offshore wind farms in consenting/pre-construction (17.5GW) **Tier 3** • 12 offshore wind farms in consenting/pre-construction (10.6GW)	The economic impacts include the overall impacts of each scenario, including from offshore and onshore transmission works In addition to the economic impacts generated by the expenditure associated with Morven North it may have cumulative effects associated with its interactions with other projects, such as increasing the critical mass of the offshore wind sector (e.g. attracting manufacturers etc.), and increasing competition for limited resources, which may delay construction of other projects and/or increase capacity and efficiency in the sector. This will include potential cumulative effects on construction ports, which would be experienced as long-term.

Potential cumulative effect	Phase			Maximum Design Scenario	Justification
	C	O	D		
Demographic changes and demand for housing and other services	✓	×	×	**Scenario 4** MDS as described for Morven North (Table 17.18), assessed cumulatively with Morven South, MHPGC Project and MBAGC Project and the following other projects and plans: **Tier 1** • 6 consented offshore wind farms (9.2GW) • 9 offshore wind farms with applications submitted (10.2GW) **Tier 2** • 14 offshore wind farms in consenting/pre-construction (17.5GW) **Tier 3** • 12 offshore wind farms in consenting/pre-construction (10.6GW)	**Construction** Temporary changes to demographics and increased demand for services in the area around the construction port are likely to be made more permanent in conjunction with other projects on the east coast of Scotland. **O&M** Changes to demographics and increased demand for services in the area around the O&M port may increase as ports specialise in offshore wind farm maintenance, attracting other similar developments.

17.13 Whole project assessment and Cumulative Effects Assessment

17.13.1 Overview

17.13.1.1 A description of the significance of whole project and cumulative effects upon socio-economics receptors arising from each identified impact is given below. The whole project and CEA for Morven North is presented in Table 17.29 to Table 17.31.

Employment and Gross Value Added impacts

17.13.1.2 There is potential for employment and GVA impacts as a result of Morven North construction, O&M and decommissioning activities alongside MHPGC and MBAGC Projects, as these will result in additional economic impacts on the Scottish and UK economies. Cumulative economic impacts are not expected in Local Socio-economic Study Areas under Scenario 1 or Scenario 2, as the construction, O&M and decommissioning ports for Morven North are not epicentres of impact for the MPHGC and MBAGC Projects. Therefore, no cumulative effects are expected.

17.13.1.3 In addition, there is potential for impacts on employment and GVA as a result of Morven North construction, O&M and decommissioning activities alongside other offshore wind farms within Scotland and the UK. As a result, these could result in an increased offshore wind supply chain or increased competition for limited resources, such as ports and workers.

17.13.1.4 The summary of the whole project assessment for employment and GVA impacts is presented in Table 17.29. The summary of the cumulative effects assessment for employment and GVA impacts is presented in Table 17.30, and the two components of this effect when considered cumulatively (namely the effect of an increased offshore wind supply chain on employment and GVA impacts in Scotland and the UK, and the effect of competition for resources on employment and GVA impacts in Scotland and the UK) are discussed in turn within this table. This assessment focuses on the construction phase only, as the magnitude of impacts during the O&M and decommissioning phases was assessed as negligible for the project alone.

Demographic changes and demand for housing and other services

17.13.1.5 There is potential for demographic changes and demand for housing and other services as a result of Morven North construction, activities alongside other offshore wind developments. The activities will include the cumulative increase in demand for housing and other services if more than one wind farm decides to use the same construction port, resulting in people settling in the area on a more long-term basis. The choice of decommissioning port for Morven North is not expected to have similar effects in the Local Socio-economic Study Area and therefore no cumulative effect has been assessed.

17.13.1.6 The summary of the cumulative effects assessment for demographic changes and demand for housing and other services is presented in Table 17.31. Scenario 1 and Scenario 2 are not considered for this effect as the construction, O&M and decommissioning ports for Morven North are not epicentres of impact for the MPHGC and MBAGC Projects, and therefore there is not expected to be a cumulative effect on the Local Socio-Economic Study Areas. As such these scenarios are screened out for this specific impact.

Table 17.29: Morven North whole project assessment for employment and Gross Value-Added impacts

	Whole project assessment	
	Scenario 1: Morven North + MHPGC Project	**Scenario 2: Morven North + MBAGC Project**
Construction phase		
Magnitude of impact	The whole project assessment for Scenario 1 considers Morven North together with MHPGC Project. It was estimated from the SCDS that the development and construction of Morven North and MHPGC Project would result in £334 million GVA and 4,730 years of employment in Scotland (peaking at 1,440 jobs) and £814 million GVA and 11,750 years of employment in the UK (peaking at 3,030 jobs). Given peak employment in Scotland of 1,440 jobs (0.6% of employment in relevant sectors) and 3,030 jobs in the UK (0.1% of employment in relevant sectors). The magnitude is therefore considered to be medium in Scotland and negligible in the UK.	The whole project assessment for Scenario 2 considers Morven North together with MBAGC Project. The impact of Morven North and MBAGC Project during the development and construction has been estimated to be £356 million GVA and 4,960 years of employment in Scotland (peaking at 1,440 jobs) and £801 million GVA and 11,590 years of employment in the UK (peaking at 2,940 jobs). Given peak employment in Scotland of 1,440 jobs (0.6% of employment in relevant sectors) and 2,940 jobs in the UK (0.1% of employment in relevant sectors). The magnitude is therefore considered to be medium in Scotland and negligible in the UK.
Sensitivity of receptor	As for the construction of Morven North, the sensitivity of Scotland is considered to be low and the sensitivity of the UK is considered to be negligible.	
Significance of effect	Overall, the magnitude of the Whole Project impact is deemed to be medium and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.	Overall, the magnitude of the Whole Project impact is deemed to be medium and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.

	Whole project assessment	
	Scenario 1: Morven North + MHPGC Project	**Scenario 2: Morven North + MBAGC Project**
Further mitigation and residual significance	No additional mitigation is proposed.	
O&M phase		
Magnitude of impact	It was estimated that the expenditure in Scenario 1 would result in £7 million GVA and 90 jobs in Scotland, and £19 million GVA and 240 jobs in the UK. Given an employment impact of 90 jobs in Scotland (less than 0.1% of employment in relevant sectors) and 240 jobs in the UK (less than 0.1% of employment in relevant sectors). The magnitude is therefore, considered to be negligible in Scotland and negligible in the UK.	It was estimated that the expenditure in Scenario 2 would result in £6 million GVA and 90 jobs in Scotland, and £19 million GVA and 240 jobs in the UK. Given an employment impact of 90 jobs in Scotland (0.1% of employment in relevant sectors) and 240 jobs in the UK (less than 0.1% of employment in relevant sectors). The magnitude is therefore, considered to be negligible in Scotland and negligible in the UK.
Sensitivity of receptor	As for the O&M of Morven North, the sensitivity of Scotland is considered to be low and the sensitivity of the UK is considered to be negligible.	
Significance of effect	Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.	Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.
Further mitigation and residual significance	No additional mitigation is proposed.	

	Whole project assessment	
	Scenario 1: Morven North + MHPGC Project	**Scenario 2: Morven North + MBAGC Project**
Decommissioning phase		
Magnitude of impact	The impact of Scenario 1 during the decommissioning phase was estimated to be £36 million GVA and 440 jobs in Scotland (peaking at 220 jobs), and £67 million GVA and 800 jobs in the UK (peaking at 400 jobs). Given a peak employment impact of 220 jobs in Scotland (0.1% of employment in relevant sectors) and 400 jobs in the UK (less than 0.1% of employment in relevant sectors). The magnitude is therefore considered to be negligible in Scotland and negligible in the UK.	The impact of Scenario 1 during the decommissioning phase was estimated to be £44 million GVA and 530 jobs in Scotland (peaking at 265 jobs), and £67 million GVA and 800 jobs in the UK (peaking at 400 jobs). Given a peak employment impact of 265 jobs in Scotland (0.1% of employment in relevant sectors) and 400 jobs in the UK (less than 0.1% of employment in relevant sectors). The magnitude is therefore considered to be negligible in Scotland and negligible in the UK.
Sensitivity of receptor	As for the decommissioning of Morven North, the sensitivity of Scotland is considered to be low and the sensitivity of the UK is considered to be negligible.	
Significance of effect	Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.	Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the Scottish economy is considered to be low. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude. Overall, the magnitude of the Whole Project impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The Whole Project effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.
Further mitigation and residual significance	No additional mitigation is proposed.	

Table 17.30: Morven North cumulative effects assessment for employment and Gross Value-Added impacts

	Cumulative effects assessment	
	Scenario 4: Morven North and Tier 1, Tier 2 and Tier 3 Projects	
	Increased offshore wind supply chain	Increased competition for resources
Construction phase		
Magnitude of impact	There are a number of offshore wind farm developments that are being developed across the UK, particularly on the east coast of Scotland. There is potential for this to create a critical mass of opportunities that attract manufacturers and other industries. The most adverse scenario has been considered based on already committed investment, though further investments are likely as the supply chain develops. These projects require certainty that there will be a pipeline of offshore wind projects and orders will be forthcoming, which is why early stage projects are important in securing investment. This includes a factory proposed by Sumitomo, a Japanese multinational, to manufacture subsea cables in the Highland local authority area which is expected to directly employ over 150 people, and a factory proposed by XLCC to manufacture subsea cables in the North Ayrshire local authority area, 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. On this basis, the magnitude of impact in Scotland is considered to be medium and the magnitude of impact in the UK is considered to be negligible. More local impacts are likely to have a higher magnitude of impact.	Due to the size of the planned offshore wind expansion in the UK, including ScotWind and Innovation and Transition to Oil and Gas (INTOG), some resources such as ports, manufacturing facilities and skilled workers are likely to be in high demand. Without co-ordination between projects 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. 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. On this basis, the magnitude of impact in Scotland is considered to be negligible and the magnitude of impact in the UK is considered to be negligible. The assessment of local impacts would require knowledge of the construction port(s), which is not known at this stage. As such, the magnitude cannot be assessed at a local scale.
Sensitivity of receptor	As for the construction of Morven North, the sensitivity of Scotland is considered to be low and the sensitivity of the UK is considered to be negligible.	
Significance of effect	Overall, the magnitude of the cumulative impact is deemed to be medium and the sensitivity of the Scottish economy is considered to	Overall, the magnitude of the cumulative impact is deemed to be negligible and the sensitivity of the Scottish economy is considered

	Cumulative effects assessment	
	Scenario 4: Morven North and Tier 1, Tier 2 and Tier 3 Projects	
	Increased offshore wind supply chain	Increased competition for resources
	be low. The cumulative effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of employment is at the lower level of the threshold for magnitude, and the contribution of Morven North is likely to be relatively small. Overall, the magnitude of the cumulative impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The cumulative effect will, therefore, be of **negligible beneficial** significance, which is not significant in EIA terms.	to be low. The cumulative effect will, therefore, be of **negligible adverse** significance, which is not significant in EIA terms. Overall, the magnitude of the cumulative impact is deemed to be negligible and the sensitivity of the UK economy is considered to be negligible. The cumulative effect will, therefore, be of **negligible adverse** significance, which is not significant in EIA terms.
Further mitigation and residual significance	No additional mitigation is proposed.	

Table 17.31: Morven North cumulative effects assessment from demographic changes and demand for housing and other services

	Cumulative effects assessment
	Scenario 4: Morven North and Tier 1, Tier 2 and Tier 3 Projects
Construction phase	
Magnitude of impact	While Morven North will lead to short-term changes in demographics and demand for services at the construction port, there is strong demand within the offshore wind sector for construction ports. If additional projects use this port the impacts will be longer-term. As a result, the impact may be seen as more beneficial. Given that the Local Socio-Economic Study Area for Scapa Flow (Orkney) has a long-term challenge associated with maintaining its population, and this has been identified as a key challenge (The Orkney Partnership, 2025), it is anticipated that a long-term increase in population of working age, and the associated increase in demand for services would be experienced as positive. This would require other actors, such as Orkney Islands Council and the private sector, to respond (e.g. by building additional housing and employing additional teachers etc.). Given the potential increase in population associated with Morven North has been estimated to be 70, which is between 0.25% and 0.5% of the population (0.3%). The magnitude is therefore considered to be low.
Sensitivity of receptor	The most sensitive port to demographic and other changes is the one with the smallest population, which would be at the Local Socio-Economic Study Area for Scapa Flow. Given a population of 22,030, the sensitivity of the receptor is considered to be high.
Significance of effect	Overall, the magnitude of the cumulative impact is deemed to be low and the sensitivity of the receptor (Local Socio-Economic Study Area for Scapa Flow) is considered to be high. The cumulative effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of population change is at the lower level of the threshold for magnitude.
Further mitigation and residual significance	The Applicant will work in collaboration with other developers and the local community to ensure that the associated impacts contribute to positive change in the local area.
O&M phase	
Magnitude of impact	Morven North may lead to changes in demographics and demand for services at the O&M port. If this makes the port more attractive to other projects (e.g. due to infrastructure investments), who choose the port on this basis, it may increase the scale of changes. Given that the Local Socio-Economic Study Area for Scapa Flow (Orkney) has a long-term challenge associated with maintaining its population, and this has been identified as a key challenge (The Orkney Partnership, 2025), it is anticipated that

	Cumulative effects assessment
	Scenario 4: Morven North and Tier 1, Tier 2 and Tier 3 Projects
	a long-term increase in population of working age, and the associated increase in demand for services would be experienced as positive. This would require other actors, such as Orkney Islands Council and the private sector, to respond (e.g. by building additional housing and employing additional teachers etc.). Given the potential increase in population associated with Morven North has been estimated to be 72, which is between 0.25% and 0.5% of the population (0.3%). The magnitude is therefore considered to be low.
Sensitivity of receptor	The most sensitive port to demographic and other changes is the one with the smallest population, which would be at the Local Socio-Economic Study Area for Scapa Flow. Given a population of 22,030, the sensitivity of the receptor is considered to be high.
Significance of effect	Overall, the magnitude of the cumulative impact is deemed to be low and the sensitivity of the receptor (Local Socio-Economic Study Area for Scapa Flow) is considered to be high. The cumulative effect will, therefore, be of **minor beneficial** significance, which is not significant in EIA terms. Minor significance has been chosen since the level of population change is at the lower level of the threshold for magnitude.
Further mitigation and residual significance	The Applicant will work in collaboration with other developers and the local community to ensure that the associated impacts contribute to positive change in the local area.

17.13.2 Proposed monitoring

17.13.2.1 Table 17.25 describes monitoring for cumulative effects associated with socio-economics, in line with best practice and the designed-in measures.

Table 17.32: Monitoring commitments for socio-economics

Potential environmental effect	Monitoring commitment	Means of implementation
Employment and GVA impacts	Monitor expenditure throughout the supply chain against the SCDS, as required by the CES Option Lease Agreement.	This is committed to within the SCDS, which has been secured through the Option Lease Agreement
Demographic changes and demand for housing and other services	Engage with local authorities in the vicinity of construction and O&M ports to support local authority planning.	Detailed monitoring commitments will be agreed post consent and are likely to include community engagement events.

17.14 Transboundary effects

17.14.1.1 A screening of transboundary impacts has been carried out (see Volume 3, Annex 6.2: Transboundary Effects Screening). The potential for significant transboundary effects with regard to socio-economics to result from Morven North upon the interests of European Union (EU) States has been assessed. The potential transboundary impacts are summarised below:

- Employment and GVA impacts outside of the UK during construction, O&M and decommissioning, as a result of spending outside of the UK.

Construction phase

17.14.1.2 In addition to construction-related expenditure in Scotland and the UK, there is expected to be £1.6 billion in expenditure in the EU and £456 million elsewhere in the world. The largest category of expenditure is expected to be wind turbine engines. This will generate economic activity and support employment in the EU and elsewhere.

17.14.1.3 While there are likely to be beneficial transboundary socio-economic effects associated with Morven North, given the greater scale of the EU and global economies, it is considered likely that, at most, there will be a negligible beneficial transboundary effect.

Table 17.33: Morven North construction expenditure

	EU	Elsewhere	Total
Construction	£1,637 million	£456 million	£2,750 million

O&M phase

17.14.1.4 In addition to annual expenditure in Scotland and the UK, there is expected to be an annual expenditure of £9 million in the EU. 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.

Table 17.34: Morven North operations and maintenance expenditure

	EU	Elsewhere	Total
O&M	£9 million	-	£29 million

17.15 Inter-related effects

17.15.1.1 For offshore socio-economics, the inter-related effects are discussed throughout this chapter and environmental effects from other chapters, such as shipping and navigation, are incorporated into the assessment. As inter-related and interacting effects are already considered within this chapter, no potential socio-economic effects are considered within this section.

17.16 Summary of impacts, mitigation, Likely Significant Effects and monitoring

17.16.1.1 Information on socio-economics within the Study Area, including Scotland, the UK and the potential construction and O&M ports was collected through desktop review.

17.16.1.2 presents a summary of the potential impacts, mitigation measures and the conclusion of likely significant effects on socio-economics in EIA terms. Overall, it is concluded that there will be the following likely significant effect arising from Morven North during the construction, O&M or decommissioning phases:

- Moderate beneficial and temporary economic impacts in the Local Socio-Economic Study Area during the construction phase.

17.16.1.3 Table 17.36 presents a summary of the potential cumulative impacts, mitigation measures and the conclusion of likely significant effects on socio-economics in EIA terms. Overall, it is concluded that there will be no significant cumulative effect from Morven North.

17.16.1.4 No likely significant transboundary effects have been identified in regard to effects of Morven North.

Table 17.35: Summary of likely significant effects, mitigation and monitoring

C= Construction, O= Operations and Maintenance, D= Decommissioning phases. "✓" is used to denote the phase the potential impact can occur, "✗" outlines there is no impact within this project phase

Description of impact	Phase			Designed-in measures	Magnitude of impact	Sensitivity of receptor	Significance of effect	Additional mitigation measures	Significance of residual effect	Proposed monitoring
	C	O	D							
Employment and GVA impacts - Scotland	✓	✗	✗	SCDS	Medium	Low	Minor beneficial	n/a	Minor beneficial	Monitor expenditure throughout the supply chain
	✗	✓	✗	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
	✗	✗	✓	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
Employment and GVA impacts - UK	✓	✗	✗	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	Monitor expenditure throughout the supply chain
	✗	✓	✗	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	
	✗	✗	✓	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	
Employment and GVA impacts - Local Socio-Economic Study Area	✓	✗	✗	n/a	High	Low	Moderate beneficial	n/a	Moderate beneficial	n/a
	✗	✓	✗	n/a	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	n/a
	✗	✗	✓	n/a	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	n/a
Demographic changes and demand for housing and other services	✓	✗	✗	Community Engagement Plan and engagement with local authorities	Low	High	Minor adverse	n/a	Minor adverse	Engage with the communities and local authorities around construction and O&M ports

Description of impact	Phase			Designed-in measures	Magnitude of impact	Sensitivity of receptor	Significance of effect	Additional mitigation measures	Significance of residual effect	Proposed monitoring
	C	O	D							
	×	✓	×	Community Engagement Plan and engagement with local authorities	Negligible	High	Minor beneficial	n/a	Minor beneficial	
	×	×	✓	n/a	Low	High	Minor adverse	n/a	Minor adverse	n/a

Table 17.36: Summary of likely significant cumulative environment effects, mitigation and monitoring

C= Construction, O= Operations and Maintenance, D= Decommissioning phases. "✓" is used to denote the phase the potential impact can occur, "X" outlines there is no impact within this project phase

Description of impact	Phase			Designed-in measures	Magnitude of impact	Sensitivity of receptor	Significance of effect	Additional mitigation measures	Significance of residual effect	Proposed monitoring
	C	O	D							
Scenario 1 – Morven North and MHPGC Project										
Employment and GVA impacts - Scotland	✓	×	×	SCDS	Medium	Low	Minor beneficial	n/a	Minor beneficial	Monitor expenditure throughout the supply chain
	×	✓	×	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
	×	×	✓	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
Employment and GVA impacts - UK	✓	×	×	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	Monitor expenditure throughout the supply chain
	×	✓	×	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	
	×	×	✓	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	
Scenario 2 – Morven North and MBAGC Project										
Employment and GVA impacts – Scotland	✓	×	×	SCDS	Medium	Low	Minor beneficial	n/a	Minor beneficial	Monitor expenditure throughout the supply chain
	×	✓	×	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
	×	×	✓	SCDS	Negligible	Low	Negligible beneficial	n/a	Negligible beneficial	
	✓	×	×	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	Monitor expenditure

Description of impact	Phase			Designed-in measures	Magnitude of impact	Sensitivity of receptor	Significance of effect	Additional mitigation measures	Significance of residual effect	Proposed monitoring
	C	O	D							
Employment and GVA impacts - UK	×	✓	×	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	throughout the supply chain
	×	×	✓	SCDS	Negligible	Negligible	Negligible beneficial	n/a	Negligible beneficial	
Scenario 4 – Morven Programme and Other Projects										
Employment and GVA impacts - Scotland	✓	×	×	n/a	Increased offshore wind supply chain: Medium Increased competition for resources: Negligible	Low	Increased offshore wind supply chain: Minor beneficial Increased competition for resources: Negligible adverse	n/a	Increased offshore wind supply chain: Minor beneficial Increased competition for resources: Negligible adverse	n/a
Employment and GVA impacts - UK	✓	×	×	n/a	Increased offshore wind supply chain: Negligible Increased competition for resources: Negligible	Negligible	Increased offshore wind supply chain: Negligible beneficial Increased competition for resources: Negligible adverse	n/a	Increased offshore wind supply chain: Negligible beneficial Increased competition for resources: Negligible adverse	n/a
Demographic changes and demand for	✓	×	×	Community Engagement Plan	Low	High	Minor beneficial	n/a	Minor beneficial	Engage with the communities and local authorities around

Description of impact	Phase			Designed-in measures	Magnitude of impact	Sensitivity of receptor	Significance of effect	Additional mitigation measures	Significance of residual effect	Proposed monitoring
	C	O	D							
housing and other services										construction and O&M ports
Demographic changes and demand for housing and other services	×	✓	×	Community Engagement Plan	Low	High	Minor beneficial	n/a	Minor beneficial	Engage with the communities and local authorities around construction and O&M ports

17.17 References

bp/EnBW. (2023). Supply Chain Development Statement - Outlook. Available at: https://www.crownestatescotland.com/sites/default/files/2023-07/morven-scds-outlook-july-2023-update.pdf. (Accessed: November 2025).

Department of Energy Security and Net Zero. (2025). Clean Power 2030 Action Plan. Available at: https://www.gov.uk/government/publications/clean-power-2030-action-plan/clean-power-2030-action-plan-a-new-era-of-clean-electricity-main-report. (Accessed: November 2025).

Highlands and Islands Enterprise. (2018). Young People and the Highlands and Islands: Maximising Opportunities. Available at: https://www.hie.co.uk/media/3007/youngpluspeopleplusandplustheplushighlandsplusandplusislandsplus-plusmaximisingplusopportunitiesplus-plusreport.pdf. (Accessed: November 2025).

HM Treasury. (2022). The Green Book: appraisal and evaluation in central government. Available at: https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2020. (Accessed: November 2025).

International Monetary Fund. (2025). World Economic Outlook Database. Available at: https://www.imf.org/en/publications/weo/weo-database/2025/april. (Accessed: November 2025).

Marine Analytical Unit. (2022). General Advice for Socio-Economic Impact Assessment.

Marine Directorate. (2022). Defining 'local area' for assessing impact of offshore renewables and other marine developments: guidance principles. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/research-and-analysis/2022/06/defining-local-area-assessing-impact-offshore-renewables-marine-developments-guidance-principles/documents/marine-scotland-defining-local-area-assessing-imp. (Accessed: November 2025).

NISRA. (2023). Business Register and Employment Survey, Northern Ireland, 2022. Available at: https://www.nisra.gov.uk/publications/bres-publication-and-tables-2022. (Accessed: November 2025).

NISRA. (2024). Mid-2023 Population Estimates: Single year of age and sex. Available at: https://www.nisra.gov.uk/publications/2023-mid-year-population-estimates-Northern-ireland-and-estimates-population-aged-85. (Accessed: November 2025).

NRS. (2022). Electoral ward population estimates. Available at: https://www.nrscotland.gov.uk/publications/electoral-ward-population-estimates/. (Accessed: November 2025).

NRS. (2024). Mid-2023 Population Estimates – local authority. Available at: https://www.nrscotland.gov.uk/publications/mid-2023-population-estimates/. (Accessed: November 2025).

Offshore Wind Industry Council. (2025). Wind Industry Skills Intelligence Report. Available at: https://www.renewableuk.com/media/jvsdey0k/ruk-owic-offshore-wind-skills-report_2025.pdf. (Accessed: November 2025).

Office for National Statistics. (2024a). Population estimates - local authority based by single year of age. Available at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates. (Accessed: November 2025).

Office for National Statistics. (2024b). Annual Population Survey. Available at: https://www.nomisweb.co.uk. (Accessed: November 2025).

Office for National Statistics. (2024c). Annual Survey of Hours and Earnings 2024. Available at: https://www.nomisweb.co.uk. (Accessed: November 2025).

Office for National Statistics. (2024d). Business Register and Employment Survey 2023. Available at: https://www.nomisweb.co.uk. (Accessed: November 2025).

Office for National Statistics. (2025a). Jobs Density Survey. Available at: https://www.nomisweb.co.uk. (Accessed: November 2025).

Office for National Statistics. (2025b). National population projections: 2022-based. Available at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/nationalpopulationprojections/2022based. (Accessed: November 2025).

Scottish Government. (2015). Sectoral Marine Plan. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2015/03/scotlands-national-marine-plan/documents/00475466-pdf/00475466-pdf/govscot%3Adocument/00475466.pdf. (Accessed: November 2025).

Scottish Government. (2020). Offshore Wind Policy Statement. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/advice-and-guidance/2020/10/offshore-wind-policy-statement/documents/offshore-wind-policy-statement/offshore-wind-policy-statement/govscot%3Adocument/offshore-wind-policy-statement.pdf. (Accessed: November 2025).

Scottish Government. (2022). National Strategy for Economic Transformation. Available at: https://www.gov.scot/publications/scotlands-national-strategy-economic-transformation/. (Accessed: November 2025).

Scottish Government. (2023a). National Planning Framework 4. Available at: https://www.gov.scot/publications/national-planning-framework-4/. (Accessed: November 2025).

Scottish Government. (2023b). Draft Energy Strategy and Just Transition Plan. Available at: https://www.gov.scot/binaries/content/documents/govscot/publications/strategy-plan/2023/01/draft-energy-strategy-transition-plan/documents/draft-energy-strategy-transition-plan/draft-energy-strategy-transition-plan/govscot%3Adocument/draft-energy-strategy. (Accessed: November 2025).

Scottish Government. (2025a). Sub-Scotland Economic Statistics Database. https://www.gov.scot/publications/sub-scotland-economic-statistics-database/. (Accessed: November 2025).

Scottish Government. (2025b). Draft Updated Sectoral Marine Plan for Offshore Wind Energy: https://www.gov.scot/binaries/content/documents/govscot/publications/consultation-

paper/2025/05/draft-updated-sectoral-marine-plan-offshore-wind-energy-2025/documents/draft-updated-sectoral-marine-plan-offshore-wind-energy/draft-updated-sectoral-marine-plan. (Accessed 9 January 2026).

The Orkney Partnership. (2025). Orkney Community Plan: 2025 to 2030. Available at: https://orkneycpp.org.uk/wp-content/uploads/2025/09/Orkney-Community-Plan-2025-2030.pdf. (Accessed: December 2025).

UK Government. (2024). Plan for Change. Available at: https://assets.publishing.service.gov.uk/media/6751af4719e0c816d18d1df3/Plan_for_Change.pdf. (Accessed: November 2025).

UK Government. (2025a). Modern Industrial Strategy. Available at: https://www.gov.uk/government/collections/the-uks-modern-industrial-strategy-2025. (Accessed: November 2025).

UK Government. (2025b). Modern Industrial Strategy: Clean Energy Industries Sector Plan. Available at: https://www.gov.uk/government/collections/the-uks-modern-industrial-strategy-2025. (Accessed: November 2025).