Bowdun Offshore Wind Farm, Offshore EIA Report

Volume 1, Chapter 18: Socio-Economics, Tourism and Recreation

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Glossary

Defined Term	Definition
Array Area	The Array Area is the area in which the Offshore Generation Assets will be located and is shown outlined in purple in Figure 1.1 of this Offshore EIA Report.
Additional Mitigation	Also referred to as secondary mitigation which is defined by The Institute of Sustainability and Environmental Professionals (ISEP) (formerly Institute of Environmental Management and Assessment (IEMA)) as: Actions that will require further activity in order to achieve the anticipated outcome. These may be imposed as part of the planning consent, or through inclusion in the Environmental Impact Assessment (EIA) Report (sic).
Cumulative Effects	The effects of the Proposed Development assessed together with effects from one or more different projects on the same receptor/resource.
Effect	Term used to express the consequence of an impact i.e. the result of change or changes on specific environmental resources or receptors. The significance rating of an effect is determined by correlating the magnitude of the impact with the importance, or sensitivity of the receptor or resource in accordance with defined significance criteria.
Embedded Mitigation	Measures that are adopted as part of the Proposed Development and therefore assessed within the EIA. The proposed approach for the EIA for the Proposed Development is that Embedded Mitigation includes both primary mitigation and tertiary mitigation. These are defined by ISEP as follows: Primary: Modifications to the location or design of the development made during the pre-application phase that are an inherent part of the project, and do not require additional action to be taken. Tertiary: Actions that would occur with or without input from the EIA feeding into the design process. These include actions that will be undertaken to meet other existing legislative requirements, or actions that are considered to be standard practices used to manage commonly occurring environmental effects.
Environmental Impact Assessment (EIA)	Process for the assessment of the likely significant environmental effects of a project on the physical, biological, and human environment during construction, Operation and Maintenance (O&M) and decommissioning.
Export Cable Corridor	The area of seabed seaward of Mean High-Water Springs (MHWS) outlined in blue on Figure 1.1, which connects the Array Area with the Landfall area, and within which the Offshore Export Cables will be installed.
Gross Disposable Household Income (GDHI)	Measures the total amount of money households have available to spend or save after paying direct taxes and receiving benefits or welfare payments.
Gross Value Added (GVA)	Measures the contribution of individual companies, industries, and regions to the national economy. This figure is presented at current prices, reflecting the total value generated by the economy/sector after subtracting intermediate consumption (i.e., the cost of inputs used in production).

Defined Term	Definition
High Voltage Alternating Current (HVAC)	A system of power transmission and distribution that utilises alternating current at voltages typically exceeding 1000 volts, as defined by the International Electrotechnical Commission (2015). HVAC systems are designed to efficiently deliver electricity over long distances with minimal losses, leveraging transformers to modify voltage levels.
Impact	A change caused by an action that occurs during a project's lifetime.
Inter-Array Cables (IAC)	Cables which link the Wind Turbines to each other and with the Offshore Substation Platforms (OSPs).
Interconnector Cables	Cables which will connect individual OSPs to each other to provide redundancy against cable failure elsewhere.
Inter-related Effects	The potential effects of multiple impacts from the construction, operation and maintenance and decommissioning of the Proposed Development, affecting one receptor.
Intertidal Area	The area between Mean High-Water Springs (MHWS) and Mean Low Water Springs (MLWS).
Landfall	The area in which the Offshore Export Cables make Landfall and is also the transitional area between the Offshore Transmission Assets and the Onshore Transmission Assets. Located in the Intertidal Area (see definition above) at Bay of Benholm.
Maximum Design Scenario (MDS)	The scenario within the design envelope likely to result in the greatest impact on a particular topic receptor, and therefore the one that should be assessed for that topic receptor.
Mean High Water Springs (MHWS)	The average tidal height throughout a year of two successive high waters during those periods of 24 hours when the range of the tide is greatest.
Mean Low Water Springs (MLWS)	The average tidal height throughout a year of two successive low waters during those periods of 24 hours when the range of the tide is greatest.
Mitigation	Measures to avoid, prevent, reduce or control effects on the environment. See also definitions for Embedded Mitigation and Additional Mitigation.
Offshore Export Cables	Subsea cables used to transmit electricity generated offshore by the Wind Turbines from the OSPs to shore. The Transition Joint Bay (TJB) is the location where the Offshore Export Cable terminates, and the onshore cabling begins.
Offshore Generation Assets	The infrastructure required for the Proposed Development required to generate electricity comprising of the Wind Turbines, Wind Turbine foundations and associated infrastructure.
Offshore Infrastructure	All of the infrastructure associated with the Project, which is located seaward of MHWS, comprising the Offshore Generation Assets and the Offshore Transmission Assets.
Offshore Substation Platform(s) (OSPs)	OSPs comprise the support structure, topside and electrical components used for collecting and/or converting electricity generated by the Wind Turbines for transmission by the Offshore Export Cables.
Offshore Transmission Assets	The Offshore Transmission Assets required for the Proposed Development comprising of the OSPs, Offshore Export Cables and associated infrastructure up to MHWS.
Onshore	Area Landward of Mean Low Water Springs.

Defined Term	Definition
Operations and Maintenance (O&M)	Includes routing inspections, repairs and replacement of infrastructure and equipment associated with the Proposed Development.
Planning Permission in Principle (PPP) Application Boundary	The physical site boundary for the PPP application.
Plan Option Area (POA)	A location identified in the Sectoral Marine Plan (SMP) as a preferred area for commercial scale offshore wind development.
Pre-Application Consultation (PAC)	Statutory engagement with communities and stakeholders prior to submission of the consent applications both onshore and offshore.
Primary Industries	Primary industries involve the extraction, harvesting, and production of raw materials directly from the earth, including agriculture, mining, fishing, and forestry.
Project (the)	An overarching term for the Bowdun Offshore Wind Farm (Bowdun OWF) comprising the offshore and onshore infrastructure required to generate and transmit electricity from the Array Area to the onshore Grid Connection Point (GCP). The Project includes both the Offshore Generation Assets, the Offshore Transmission Assets and the Onshore Transmission Assets.
Project Design Envelope (PDE)	A description of the range of possible elements that make up the design options for the Proposed Development under consideration when the exact engineering parameters are not yet known.
Proposed Development	Term used to define the Offshore Infrastructure and works associated with the Project seaward of MLWS for which consent is being sought by the Offshore Application, and which includes the Offshore Infrastructure. Further details of the parameters of the Proposed Development are included in Volume 1, Section 3: Project Description.
Scoping Opinion	Regulation 17 of EIA Regulations allows for a request to the Planning Authority (or Scottish Ministers as appropriate) to be made to provide ‘an opinion’ in relation to the EIA. The Scoping Opinion is the formal written response outlining the scope and level of detail expected to be provided in the Onshore EIA Report.
ScotWind	Name given to the Crown Estate Scotland offshore wind leasing in April 2022. This was the process of making seabed available for commercial-scale offshore wind projects.
Study Area	For each environmental topic, the baseline environment will be characterised, and the potential environmental impacts will be described within a topic-specific ‘study area’. The study areas are defined for each topic in the Onshore Scoping Report and are based on the maximum spatial extent across which potential impacts of the Proposed Development may be experienced by the relevant receptors (i.e., zone of Influence).
Tier 1 Contractors	The primary companies responsible for delivering major scopes of work on a project. They typically hold the largest and most critical contracts and manage significant portions of construction or installation activities. In the context of the Bowdun Offshore Wind Farm, DEME Offshore is the Tier 1 contractor for offshore construction.
Transition Joint Bay (TJB)	Used to connect an onshore cable to an offshore cable. These are typically concrete lined and are located at the Landfall (see definition above) and where required to join cable runs.
Thistle Wind Partners (TWP)	Company established for the development of the Project.

Defined Term	Definition
Wind Turbines	Structures comprising of a tubular tower, rotor blades, and a nacelle which houses the Wind Turbine generator.
Zone of Influence	The area around the Proposed Development that may be impacted by the proposed works.

Acronyms

Acronym	Definition
ALO	Agreement for Lease Option
aFTE	Years of Employment
aGVA	GVA at Basic Prices
BRES	Business Register and Employment Survey
CAPEX	Capital Expenditure
CCUS	Carbon Capture Utilisation and Storage
CEA	Cumulative Effects Assessment
CEMP	Construction Environmental Management Plan
CTMP	Construction Traffic Management Plan
DESNZ	Department for Energy Security and Net Zero
EIA	Environmental Impact Assessment
FMMCP	Fisheries Mitigation, Monitoring and Communication Plan
FTE	Jobs
GDHI	Gross Domestic Household Income
GDP	Gross Domestic Product
GVA	Gross Value Added
GVA(B)	Gross Value Added (Balanced)
HFSV's	Home Fire Safety Visits
HGVs	Heavy Goods Vehicles
HHCP	Highland Health and Social Care Partnership
HVAC	High Voltage Alternating Current
IAC	Inter-Array Cables
ITL	International Territorial Level
INTOG	Targeted Oil and Gas
LAT	Lowest Astronomical Tide
LDP	Local Development Plan
LTE	Long Term Empty
MDS	Maximum Design Scenario
MHWS	Mean High Water Springs
MLWS	Mean Low Water Springs
NHS	National Health Service
NPF4	National Planning Framework 4
NSVMP	Navigational Safety and Vessel Management Plan
OEUK	Offshore Energies UK

O&G	Oil and Gas
O&M	Operations and Maintenance
OSP’s	Offshore Substation Platform(s)
OPEX	Operational Expenditure
OWFs	Offshore Wind Farms
POA	Plan Option Area
PDE	Project Design Envelope
PPP	Planning Permission in Principle
PRoW’s	Public Rights of Way
SCDS	Supply Chain Development Statement
SHIP	Strategic Housing Investment Plans
SIC	Standard Industrial Classification
SIMD	Scottish Index of Multiple Deprivation
SLVIA	Seascape, Landscape and Visual Impact
SMP	Sectoral Marine Plan
SOWEC	Scottish Offshore Wind Energy Council
SUTs	Supply and Use Tables
TJB	Transition Joint Bay
TOW	Trees Outside Woodland
TTWAs	Travel to Work Areas
TWP	Thistle Wind Partners
UK	United Kingdom

Table of Units

Units	Definition
%	Percent
‘	Minute
£	GBP
°	Degree
°C	Degree Celsius
cm	Centimetre
CO^2e	Carbon Dioxide Equivalent
dB	Decibel
ft	Feet
gCO^2/kWh	Grams of Carbon Dioxide per Kilowatt-Hour
GW	GigaWatt
J	Joule

kg	Kilogram
kHz	Kilohertz
kJ	Kilojoule
km	Kilometre
km^2	Square kilometre
kts	knots
kV	Kilovolt
m	Metre
m/s	Metre per second
m^2	Square Metre
mLAT	Metres above/below Lowest Astronomical Tide
mm	Millimetre
MW	MegaWatt
nm	Nautical mile
tCO^{2}e	Tonnes of Carbon Dioxide Equivalent

18 Socio-Economics, Tourism and Recreation

18.1 Introduction

18.1.1 This chapter of the Offshore Environmental Impact Assessment (EIA) Report, prepared by Jacobs, identifies the socio-economics, tourism and recreation receptors of relevance to the Project.

18.1.2 The Assessment considers potential impacts arising from the construction, Operation and Maintenance (O&M), and decommissioning phases. The assessment presented is informed by the following technical chapters of the Offshore EIA Report and the Onshore EIA Report:

- Volume 2, Chapter 13: Commercial Fisheries;
- Volume 2, Chapter 14: Shipping and Navigation;
- Volume 2, Chapter 16: Infrastructure and Other Users;
- Volume 2 Chapter 20: Seascape, Landscape and Visual Impacts; and
- Volume 2, Chapter 21: Cultural Heritage.
- Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025)

18.1.3 The assessment is supported by the following technical appendices:

- Volume 3, Technical Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline;
- Volume 3, Technical Appendix 18.2: Socio-Economics Quantitative Assessment Methodology; and
- Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore).

18.1.4 In this chapter, the methodology, baseline and key parameters for the assessment are explained, and the analysis of significant effects is undertaken.

18.1.5 The following are assessed and reported in this chapter:

- Impact on Gross Value Added (GVA), employment and supply chain;
- Demographic changes;
- Changes to demand for housing and other services;
- Changes to tourism and recreation receptors; and
- Socio-cultural impacts.

18.1.6 The assessment of the wider socio-economic, tourism and recreation impacts presented in this chapter is for the Offshore Infrastructure of the Bowdun Offshore Wind Farm (OWF) (‘the Proposed Development’). The assessment of GVA, employment and supply chain effects is for the whole project including offshore and onshore infrastructure of the Bowdun OWF (‘the Project’).

18.1.7 Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore), presents the combined assessment for all socio-economic, tourism and recreation sub-topics for both the Onshore Infrastructure and Offshore Infrastructure, informed by this chapter and Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

18.2 Socio-Economics, Tourism and Recreation Study Areas

18.2.1 Whilst the Proposed Development is located offshore, for most of the socio-economic effects, the relevant study areas are onshore, since the organisations, individuals and communities that might be affected by the Proposed Development are based in onshore communities, including coastal communities. The study areas for the Proposed Development are defined independently of the definition of study areas for the Onshore Infrastructure, however the methodology used to define these study areas is the same.

18.2.2 The Socio-Economics, Tourism and Recreation Study Areas used in this assessment have been defined in line with the guidance on identification of impact areas for offshore developments published by the Scottish Government (Scottish Government, 2022a) and Guidance on assessing the socio-economic impacts of offshore wind farms (Glasson et al, 2020).

18.2.3 The Scottish Government guidance (Scottish Government, 2022a) identifies six principles for identifying study areas for offshore renewables and other marine developments. The principles consider the main locations where socio-economic impacts will occur and have been applied to the Proposed Development. These principles, and how they have been considered in identifying the study areas for the assessment, are presented in Table 18.1.

Table 18.1: Principles for Identifying Study Areas

Principle	Consideration in identification of study areas
Principle 1 (Dual Geographies) – The impact area for the Supply Chain and Investment Impacts should be separate from the impact area(s) for Wider Socio-Economic Impacts.	The study area for the GVA and employment sub-topic (Supply Chain and Investment Impacts) is separate to the study areas for the other sub-topics (Wider Socio-Economic Impacts). These areas are defined in Table 18.2.
Principle 2 (Appropriate Impacts) – The appropriate impacts for assessments should be identified prior to defining the local areas. When establishing geographies, these impacts must be taken into account to ensure the assessment remains consistent, comparable, and practical.	Appropriate impacts were identified as part of the scoping exercise and the local areas have been defined with cognisance of the likely significant effects for each sub-topic.
Principle 3 (Epicentres) – The study areas should include all the epicentres of the appropriate impacts (including both the Supply Chain and Investment Impacts and the Wider Socio-Economic Impacts).	Epicentres for impacts on GVA and employment (Supply Chain and Investment impacts) have been linked to the location of suppliers and the local authorities where the O&M ports are likely to be situated. Accordingly, a Regional Socio-Economics Study Area has been included as an impact epicentre and assessed separately for O&M. For the other sub-topics (Wider Socio-Economic Impacts), consideration has been given to the study areas utilised in the relevant environmental topic assessments (refer to Paragraph 18.1.5), local authorities where ports may be situated, and construction and O&M activity around Landfall.
Principle 4 (Accountability) – The impact areas used in the assessment should	Baseline data has been collected from appropriate pre-existing economic and administrative areas

Principle	Consideration in identification of study areas
comprise of pre-existing economic or political geographies (community councils, local authorities, development agencies) to enhance accountability and enable a reliable baseline to be described.	and study areas have been defined accordingly, as per Table 18.2.
Principle 5 (Understandable) – The impact areas should be defined in such a way that is clear and easily understood by the communities they describe.	The Local Socio-Economics Study Area is defined in terms of Electoral Ward 2022 administrative areas and settlements closest to Landfall. The Regional Socio-Economics Study Area is defined in terms of the local authorities that comprise this area.
Principle 6 (Connected Geography) – The impact area for the Supply Chain and Investment Impacts should consist of connected (including coastal) pre-existing economic or political geographies.	The study area for GVA and employment (Supply Chain and Investment Impacts) is cognisant of the inter-connected nature of the supply chain in the region and accordingly includes consideration of the Regional Socio-Economics Study Area as a distinct economic receptor.

18.2.4 With cognisance of these principles, the various topics included in this assessment are considered separately according to their individual attributes.

18.2.5 The terminology used throughout this chapter to refer to various geographical areas is as follows:

- Regional Socio-Economics Study Area refers to Aberdeenshire, Aberdeen City and Angus;
- Tourism and Recreation Study Area refers to Aberdeenshire and Aberdeen City; and
- Local Socio-Economics Study Area refers to the area around Landfall (Mearns Electoral Ward Area) [1].

18.2.6 These study areas are shown onFigure 18.1: Regional Socio-Economics Study Area and Local Socio-Economics Study Area and Figure 18.2: Tourism and Recreation Study Area and Receptors. Table 18.2 describes the study areas for the socio-economics, tourism and recreation assessment topics.

Table 18.2: Study Areas and the Assessment Topics

Type of Impact and Study Area Description	Geography
Supply Chain and Investment Impacts	
The Study Area(s) have been defined to capture broader employment and GVA impacts that may arise through supply chain activity and investment in the Project. For this assessment, impacts are presented at the UK and Scotland-wide levels, as well as for the Regional Socio-Economics Study Area. The	UK Scotland Regional Socio-Economics Study Area - Aberdeenshire, Aberdeen City, Angus

[1] Stonehaven and Lower Deeside Electoral Ward area was part of the onshore assessment study area for socio-cultural impacts because the onshore infrastructure intersects this area. Only the Mearns Electoral Ward area is included for the offshore assessment as this is the Electoral Ward at landfall. Both areas are considered together in the combined appendix (onshore and offshore).

Type of Impact and Study Area Description	Geography
Regional Socio-Economics Study Area comprises the local economies of Aberdeenshire, Aberdeen City, and Angus. The Regional Socio-Economics Study Area is considered an impact epicentre, reflecting the location of suppliers with the required expertise as well as the local authority areas where the Applicant has committed to locating an O&M port.	
Wider Socio-Economic, Tourism and Recreation Impacts	
Demographics	
Impacts on demographics are expected to arise primarily through economic mechanisms—particularly labour movement and construction and O&M activity associated with the Proposed Development. The local authorities in which potential port locations would be situated are the most likely to experience demographic changes arising from labour movement. As the C&M and decommissioning port locations have not yet been selected, a more granular study area cannot be defined for these phases. For the O&M phase, changes in demographics were assessed based on an indicative urban and rural port scenario in Aberdeenshire and Angus, where the Applicant has committed to locating an O&M port.	Regional Socio-Economics Study Area - Local authorities of potential O&M port locations: Aberdeenshire, Aberdeen City, Angus
Changes to demand for housing and local services	
The study area for changes to demand for housing and local services is the same as that for demographic changes.	Regional Socio-Economics Study Area - Local authorities of potential O&M port locations: Aberdeenshire, Aberdeen City, Angus
Changes to Tourism and Recreational Receptors	
The assessment utilises the study areas for the relevant EIA topics in the identification of significant residual impacts to assess the impacts on key tourism and recreational receptors. Relevant environmental impacts on land-based tourism and recreation receptors are derived from the following EIA chapters: Volume 1, Chapter 16: Infrastructure and Other Users), Seascape, Landscape and Visual Impacts (Volume 1, Chapter 20), and Volume 1, Chapter 20: Cultural Heritage. Relevant environmental impacts on water-based receptors (marine recreation) are derived from the following EIA chapters: Volume 1, Chapter 14: Shipping and Navigation, Volume 1, Chapter 16: Infrastructure and Other Users and Volume 1, Chapter 20: Seascape, Landscape and Visual Impacts, Volume 1, Bowdun OWF Onshore EIA Report (BOWFL, 2025). All receptors identified in the assessments are based within Aberdeenshire and Aberdeen City, primarily within the coastal areas. Accordingly, these local authority areas are considered to be the impact epicentres for tourism and recreation.	Tourism and Recreation Study Area – As per adjacent column
Socio-Cultural Impacts	
Socio-cultural impacts refer to the effects that a development or project may have on the social fabric, cultural identity, and everyday life of communities. These impacts can include changes in community cohesion, quality of life and wellbeing, and the character of local areas. Given that such effects are most directly experienced by people living closest to construction	Regional Socio-Economics Study Area - Local authorities of potential O&M port locations: Aberdeenshire, Aberdeen City, Angus

Type of Impact and Study Area Description	Geography
activity (at Landfall) and port activity, these areas are considered to be the impact epicentres. Since port locations have not yet been chosen, socio-cultural impacts related to port activities have been considered broadly in relation to urban and rural communities, including consideration of the Regional Socio-Economics Study Area for the O&M phase.	Local Socio-Economics Study Area - Electoral Ward 2022 – Mearns (includes local settlements of Gourdon and Johnshaven)

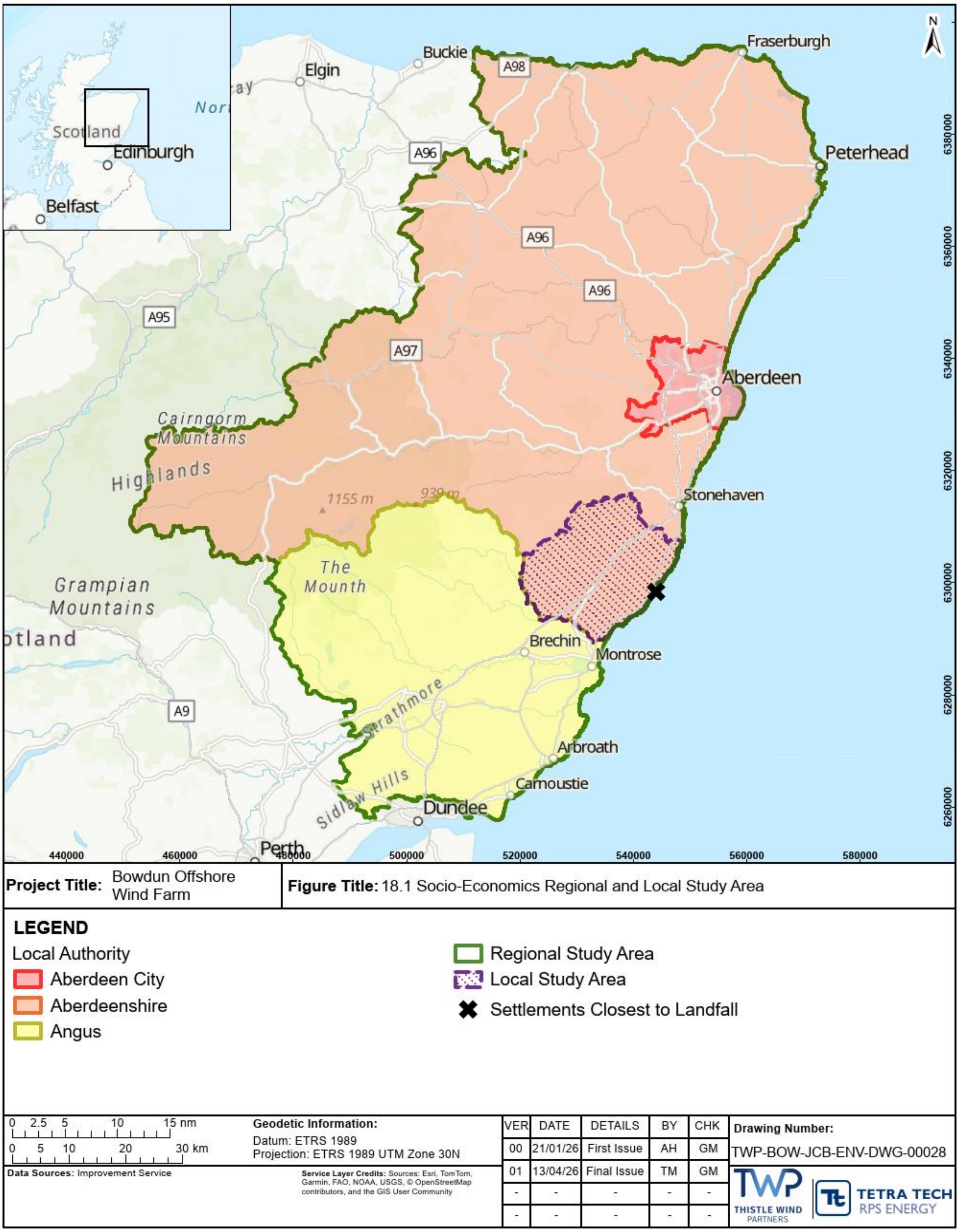

Figure 18.1: Regional Socio-Economics Study Area and Local Socio-Economics Study Area

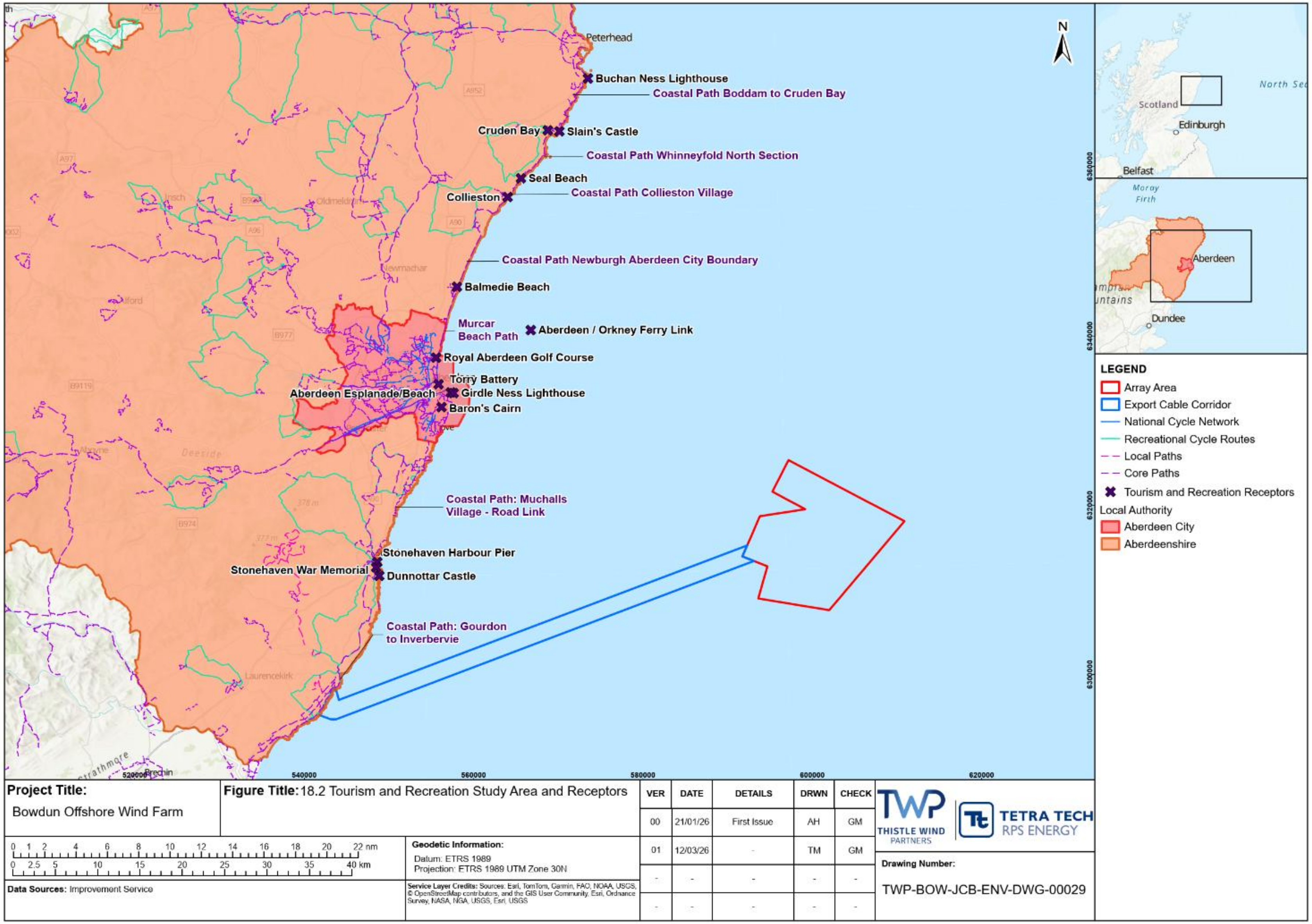

Figure 18.2: Tourism and Recreation Study Area and Receptors

18.3 Legislative and Policy Context

18.3.1 A summary of the policy provisions relevant to socio-economics, tourism and recreation are provided in Table 18.3. There is no legislation that directly defines the approach to assessing socio-economic, tourism and recreation effects; consequently, no legislative provisions are listed in the table. Legislation and policy considerations relevant to the Onshore Infrastructure assessment are provided within the Bowdun OWF Onshore EIA Report (BOWFL, 2025).

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
UK Government (2025) Modern Industrial Strategy	The strategy covers a broad range of priorities, with an underlying mission to make it "easier and simpler for companies to do business, giving them the stability to make long-term investments". One key priority is investment in the Clean Energy Transition, becoming a Clean Energy manufacturing and innovation superpower. By 2035, business investment in frontier Clean Energy Industries will at least double to over £30 billion and Offshore Wind is set to receive 300m investment into supply chains. The strategy notes issues with attracting offshore wind manufacturing and assembly to the UK without well-developed port infrastructure. The Proposed Development strategically aligns with the strategy. It supports the Clean Energy Transition, developing an OWF in a region which is most likely to register the most socio-economic impacts from the decline of the oil and gas industry. The region's legacy in oil and gas provides a large quantity of existing ports and infrastructure to support offshore construction. The Applicant's supply chain pathways programme is aimed at facilitating the transition of traditional energy service providers into renewable energy markets. The assessment of GVA and employment undertaken for the Project and presented in this chapter is undertaken using the figures from the Applicant's Supply Chain Development Statement (SCDS), which outlines expenditure targets of the Project in Scotland, the rest of the UK, and the rest of the world, based on assumptions relating to regional supply chain spend. This is considered in Section 18.10 (GVA and Employment).
UK Government (2024) Strategy and Policy Statement for Energy Policy in Great Britain	The statement sets out the UK Government's strategic priorities for energy policy, as required under the Energy Act 2013. It applies across England, Scotland, and Wales and acts as a guide to the energy sector for the actions and decisions needed to achieve the government's policy goals. The statement outlines a series of priorities aimed at achieving three key objectives of Great Britain's energy policy. These priorities are organised under the following headings: - enabling clean energy and net zero infrastructure; - ensuring energy security and protecting consumers; and - ensuring the energy system is fit for the future. Development of the Proposed Development will contribute to the government net zero objectives. The socio-economic, tourism and recreation chapter assesses both the economic and community impacts of the Proposed Development. This is considered in Section 18.10.
UK Government (2024) Clean Power 2030 Action Plan: A New Era of Clean Electricity	The plan sets out the ambitions for delivery in the path to 2030 and the expectations for the capacities of key technologies at national and regional level by 2030. Notably, the UK government outlines an ambition of 43-50GW of offshore wind capacity in the UK, as offshore wind is recognised as the backbone of the clean power system. The plan notes how these ambitions will support economic growth, particularly in coastal regions. Offshore development will stimulate innovation, job creation and the reskilling of the O&G workforce, which is likely to have positive spillover impacts in the local economy.

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	The Proposed Development supports the achievement of these offshore ambitions, in terms of capacity and economic development along the coast. This chapter assesses socio-economic impacts arising from the Project, including regional employment and supply chain effects. This is considered in Section 18.10.
UK Government (2025) Overarching National Policy Statement for Energy (EN-1)	This statement sets out the national policy for energy infrastructure, including scope and geographical coverage. It also highlights the urgent need for significant energy infrastructure investment and large-scale developments to meet the government's energy objectives. Therefore, the statement details strategies for escalating clean power generation to close the gap between current capacities and the targets laid out in the Clean Power 2030 Action Plan. For instance, offshore wind farms being built in the vicinity of other offshore wind farms/offshore infrastructure can adopt a more coordinated approach to radial connections. For example, connections to land can take power from multiple windfarms, using Multi-Purpose Interconnectors, instead of individual point-to-point connections. This approach could potentially decrease network infrastructure costs, reduce cumulative environmental impacts, and limit any impacts on coastal communities by installing a smaller quantity of larger connections. Section 18.10 of this chapter assesses economic impacts arising from investment in the Project, including regional employment and supply chain effects.
UK Government (2026) Clean Power Targets	The briefing assesses the progress on the targets outlined in the Clean Power 2030 Action Plan, defines how they are measured, and includes further contextual data on types of energy generation, new capacity, demand and current emissions from the Power sector. This briefing highlights progress in increasing energy produced from clean sources and reducing the carbon intensity of electricity generation. When looking at energy generation sources, there has been a rapid, constant rise in installed offshore wind capacity since 2010, now sitting at 16.6GW, the second largest of the clean power sources. Furthermore, offshore wind has the highest clean power capacity range for 2030, due to a large pipeline of offshore wind infrastructure. The Proposed Development supports this growth of offshore wind capacity in the UK and aligns with the Government's clean power targets for 2030. This is considered in Section 18.10.
Renewable UK (2024) Offshore Wind Industrial Growth Plan	The Plan details the aims, enablers and benefits of offshore wind as a catalyst for industrial growth. Notably, the two key aims of the plan is to grow supply chain capacity to accelerate and de-risk delivery and grow market share at home and abroad through a focus on key technologies. It also identifies existing clusters of supply chain capability, spreading from Northern Scotland to South West England. These clusters offer diverse capabilities, and when accompanied with effective coordination and leveraging of skills and expertise, will help strengthen the UK's comparative advantage. This chapter assesses how the Proposed Development supports some of these outcomes, particularly through the development of supply chain opportunities and capacity. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scottish Policy Context	

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
Scottish Government (2020) Offshore Wind Policy Statement	The policy statement builds on the ambitions outlined in Scotland's Energy Strategy. The statement suggests that as much as 11GW of offshore wind capacity is possible in Scottish waters by 2030. This will be supported by the ScotWind program and by working with industry partners to understand and tackle any barriers facing deployment. Furthermore, the policy statement notes a desire to develop the skills landscape and local supply chains to facilitate delivery, maximise economic benefits and promote resilience. In June 2025, the Scottish Government updated its ambition for offshore wind capacity and is aiming for the development of up to 40 GW by 2035-2040 in addition to existing operational capacity. The update reflects the significant increase in the number of potential offshore wind developments due to the ScotWind and the Innovation and Targeted Oil and Gas (INTOG) leasing rounds which concluded in 2022 and 2023 respectively. The evaluation of economic benefits and supply chain engagement associated with the Project are discussed in Section 18.10 of the chapter (GVA and Employment).
Scottish Government (2020) Sectoral Marine Plan for Offshore Wind Energy	The plan delves into the strategic spatial vision for future commercial-scale offshore wind energy development up to 2030 and beyond (as outlined in the Offshore Wind Policy Statement). It assesses regions and areas of commercial-scale offshore opportunity, with the aim of maximising opportunity for economic development, investment and employment across Scotland. It also considers the potential risks associated with developments in these areas, such as the impact on marine wildlife and any overlaps with existing oil and gas infrastructure, ensuring that there are no adverse impacts on economic sectors and the local environment. Section 18.10 of the chapter will support the assessment of impacts of the Proposed Development on some of these aspects, particularly the regional economy, key economic sectors, tourism and local communities.
Scottish Government (2024) Offshore Wind Focus	Offshore Wind Focus outlines the findings of the Scottish Government's strategic assessment of market opportunities, ports and harbours, and supply chain capabilities, and presents the crucial next steps for maximising the economic opportunities presented by offshore wind. The assessment highlights that these opportunities within the sector and supply chain will generate high-quality jobs across sectors such as construction, planning, engineering and procurement, which, as a result, will support a fair transition for the existing energy workforce. This is relevant for this assessment as the North East's historic economic ties to the oil and gas industry present a crucial opportunity for reskilling existing energy sector workers to support the deployment of offshore wind infrastructure in addition to ensuring an equitable economic transition within the region. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scottish Government (2024) **Scotland's National Performance Framework**	The National Performance Framework is designed to give a rounded view of economic performance and progress towards achieving sustainable and inclusive economic growth and well-being across Scotland. The framework aims to: - create a more successful country; - give opportunities to all people living in Scotland;

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	- increase the well-being of people living in Scotland; - create sustainable and inclusive growth; and - reduce inequalities and give equal importance to economic, environmental and social progress. In addition to GDP and employment, the National Performance Framework includes outcomes related to community wellbeing, education, environment, health, and poverty reduction. These indicators guide Scottish Government priorities and spending. A new iteration of the National Performance Framework is undergoing development throughout 2026. Section 18.10 of this chapter assesses how the Proposed Development supports some of these outcomes, particularly through its local economic benefits and community impacts. The assessment of GVA and employment undertaken at the Project-wide level reflects the economic contribution of the Project at the regional, national and UK level.
Scottish Government (2023) National Planning Framework 4	The National Planning Framework 4 (NPF4) is the national spatial strategy for Scotland, setting out the spatial principles, regional priorities, national developments and national planning policy. The framework supports developments that contribute to local employment, infrastructure, and sustainable communities. Under Policy 11c and 11e, renewable energy developments must demonstrate how they will maximise net economic impact, including local employment, supply chain opportunities, and community benefits. This shifts the focus from simply generating benefits to actively enhancing them, making socio-economic analysis a core part of project evaluation. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scotland's National Strategy for Economic Transformation (2022)	Delivering Economic Prosperity, the title of Scotland's National Strategy for Economic Transformation, outlines the government's ambitions and strategies for enabling strong economic performance in the 10 years between 2022-2032. One key component of the strategy is the development of the ScotWind Offshore wind programme, a historic programme which promises to put Scotland at the heart of global offshore wind developments, support the net zero transition, and deliver large benefits in terms of the supply chain and job creation. The programme is also the first to see commercial development of floating windfarm technology, assisted by Scotland's subsea engineering capabilities. Achieving the ambitions of the ScotWind programme is a key priority, with developers' commitments to invest at least £1bn in the Scottish supply chain for each GW of capacity. The Scottish Offshore Wind Energy Council has a large role in driving forward these ambitions, encouraging collaboration and effective delivery in the sector. Regional Economic Partnerships also have a key role. Partnerships in the North East of Scotland have developed a Regional Economic Strategy, a collective vision and ambition for economic diversification in the region. It centres around sustainability and outlines opportunities presented by the energy transition, the circular economy, offshore wind and Carbon Capture Utilisation and Storage (CCUS). This chapter assesses how the Proposed Development supports

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	some of these outcomes, particularly through its local economic benefits, supply chain opportunities, and contribution to growth. This is considered in Section 18.10 of the chapter.
Draft Energy Strategy and Just Transition Plan (2023)	The plan outlines the government's strategy for delivering net zero by 2045, in addition to ensuring energy security, promoting economic opportunity and an achieving an equitable energy transition. Offshore wind, as one of the cheapest forms of electricity, has a vital role, and as of 2023, there was a reported potential pipeline of over 40 GW in offshore wind projects. The strategy highlights key ambitions, such as: - Significantly scaling up renewable energy production within offshore wind power, renewable hydrogen, marine energy, solar and hydro. - Increasing support for skills development to increase worker involvement in Scotland's transition to net zero. - ScotWind, the world's largest floating offshore leasing round, to deliver up to 27.6 GW of capacity. The North East is cited as a global centre of offshore energy production and innovation, and the skills of existing oil and gas workers will be vital for the energy transition. Indeed, the government commits to investing £26 million into The Energy Transition Zone in Aberdeen, to become a focal point and catalyst for high-value manufacturing, research, development, testing and deployment, with significant opportunities in offshore wind, hydrogen, and CCUS. Achievement of these ambitions is dependent on collaboration with key stakeholders such as existing oil and gas businesses and trade unions, and through successful regional partnerships, for instance with Aberdeen City Council and Opportunity North East. This chapter assesses how the Proposed Development supports some of these ambitions, for example through offering skills development and employment opportunities for oil and gas workers transitioning out of the industry. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scottish Enterprise (2024) Net Zero Framework for Action 2024-2025	The net zero ambition focuses on economic opportunities that deliver benefits to the environment and society. There are five key areas of focus: - Supporting net zero innovation in businesses and organisations - Delivering projects and programmes - Place development - Enabling activities

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	- Becoming a net zero development agency by 2040 The approach includes elements which are fundamental to achieving a just net zero economy. These include capitalising on net zero market opportunities, adapting to climate change, protecting and improving biodiversity, stimulating circular economy practices and business models, and supporting green jobs and a just transition for businesses and sectors. The Proposed Development contributes to these goals by generating employment, supporting local supply chains, and enabling regional economic transformation aligned with net zero ambitions. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scottish Government (2025) Programme for Government 2025-26 Building The Best Future For Scotland	The Programme for Government 2025–26 sets out the Scottish Government's priorities for the final year of the current parliamentary term, with a strong focus on growing the economy. This includes building resilience in the face of global challenges by investing in jobs, skills, innovation, rural development, and inward investment. These priorities are directly relevant to the Proposed Development and inform this chapter's assessment of its potential socio-economic impacts, including job creation, GDP contribution, skills development, and benefits to the local community. This is considered in Section 18.10 of the chapter (GVA and Employment).
Scottish Tourism Alliance (2020) Scotland Outlook 2030: Responsible tourism for a sustainable future	This strategy was developed by Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise, and Skills Development Scotland, and outlines a vision for world-leading 21st century tourism. The strategy promotes responsible tourism that balances economic growth with environmental sustainability and community wellbeing, the four core priorities include: - Our passionate people - Our thriving places - Our diverse businesses - Our memorable experiences This chapter assess any impact the Proposed Development may have on local tourism and recreation in the region. This is considered in Section 18.10 of the chapter (Changes to Tourism and Recreation Receptors).
Regional Policy Context	
InvestAberdeen (2024) Regional Economic Strategy: A sustainable economic future for the North East of Scotland	This strategy outlines a vision for North East Scotland's economy to 2035, developed by Aberdeenshire Council, Aberdeen City Council, and Opportunity North East. It focuses on four key programme areas: - A thriving economy - An outstanding natural environment - A healthy, skilled population

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	- Strong community and cultural identity The strategy sets out a long-term plan for the North East region of Scotland to take advantage of the opportunities being created by the transition to a net zero economy. It also outlines a vision for 2035 through five strategic objectives the priority actions for the next five years, and current economic challenges. The key objectives include: 1. To establish the North East as a pioneer of the energy transition, by delivering an 80% reduction in carbon emissions per head; 2. Maintain regional GVA as a share of Scotland's overall GVA while increasing the share of regional employment from the region's growth sectors; 3. Maintain a healthy, sustainable, working age population through increasing economic participation rates; 4. Become a Real living Wage region with 95% of overall employment offering a real living wage or higher; and 5. Protect and enhance the natural capital of the region by aligning to national ambitions to manage 30% of the region for people and nature by 2030. The socio-economic assessment of the Proposed Development considers its potential contribution to the region's economic and demographic outcomes, including the extent to which associated employment opportunities may help attract and retain people of working age. The assessment of GVA and employment in Section 18.10 is undertaken at the Project-wide level and reflects the economic contribution of the Project at the regional, national and UK level.
Skills Development Scotland (2025) Regional Skills Strategy Aberdeen City & Shire	The strategy reflects the priorities set out in the Regional Economic Strategy and Aberdeen City Region Deal and Regional Skills Assessment, and seeks to address the skills implications of the significant changes to the North East economy taking place as a result of the downturn in the oil and gas industry. Four thematic areas for intervention have been identified as follows: - Responding to the downturn - Supporting economic transition - Repositioning the skills system - Supporting school-to-work transitions Section 18.10 of assessment examines the skills required and employment generated across the construction, operation, and decommissioning phases of the Proposed Development.
Visit Aberdeenshire (2022) Destination Aberdeen & Aberdeenshire: A Framework for Growth 2022-2030	The ambition for 2030 is for Aberdeen and Aberdeenshire to become Scotland leading visitor destination by: - Setting the pace for sustainable growth with visitors staying longer and spending more - Pioneering tourism business innovation - Being at the vanguard of delivering unique, high-quality visitor experiences

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	- Going above and beyond customer expectations Attractors, that provide the greatest opportunities for growth include business events, culture & heritage, festivals, the natural environment and outdoor activities. Finally, the fundamentals for a successful industry include digital transformation, people & skills, travel connectivity and accessibility. Success will be guided by four principles: sustainable growth, leadership, partnership and people & skills. This framework highlights the region's priorities for tourism and identifies the critical factors for its success. These considerations are essential when evaluating the potential impact of the Proposed Development on the local tourism sector – assessed in Section 18.10.
Aberdeenshire Council (2023) Aberdeenshire Local Development Plan (LDP)	The Aberdeenshire LDP 2023 sets out the spatial strategy and planning policies guiding development across the region until 2031. It aims to balance sustainable economic growth with environmental protection and climate resilience, and includes land allocations for housing, employment, retail, and regeneration. Key policy areas include: - Meeting housing and community needs - The Vibrant city (tourism and culture) which reflects the plan's aim to enhance the area's appeal by improving visitor experiences, supporting cultural activities, and strengthening town centres to create lively, distinctive places that attract both residents and visitors. - Supporting Businesses and Industrial Development The plan has been reviewed to determine socio-cultural values and community interests within Aberdeenshire, to provide baseline context of the Regional Socio-Economic Study Area. This is included in Section 18.6 of the chapter.
Aberdeen City Council (2023) Local Development Plan 2023	The plan sets out the spatial planning framework for the city through to 2033, guiding land use, development, and infrastructure investment. Key policy areas include: - Shaping business development - Shaping homes and housing Both policy areas are relevant in the context of the Proposed Development, which will impact on local business and supply chain and could impact on housing demand in the local area during construction. The plan has been reviewed to determine potential changes to demand for housing and GVA and employment impacts within the Regional Socio-Economic Study Area. This is considered in Section 18.10 of the chapter
Aberdeenshire Council (2024) Local Housing Strategy 2024-2029	The strategy outlines Aberdeenshire Council's approach to meeting housing needs across the region over five years. It is based on an assessment of housing demand, conditions, and affordability. Key priorities include increasing housing supply, offering diverse housing options, preventing homelessness, and working towards Net Zero by improving energy efficiency and reducing fuel poverty. This strategy is important in the context of the Proposed

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
	Development, as construction may impact local demographics and housing demand. The strategy has been reviewed to determine housing and local service provision within Aberdeenshire, to provide baseline context of the Regional Socio-Economic Study Area. This is included in Section 18.6 of the chapter.
Aberdeen City Council (2025) Local Housing Strategy 2025-2030	The strategy aims to ensure that all residents have access to safe, affordable, and energy-efficient homes in thriving communities. It addresses key challenges such as homelessness, fuel poverty, ageing population needs, and housing-related health inequalities. The strategy outlines seven priorities, including increasing affordable housing supply, promoting independent living, improving housing quality, and supporting a well-managed private rented sector. This strategy is important in the context of the Proposed Development, as construction may impact local demographics and housing demand. It is considered in Section 18.10 of the chapter (changes to demand for housing and local services).
Aberdeenshire Council (2024) Economic Development Service Strategy 2024 - 2029	The strategy outlines a proactive approach to supporting economic diversification, resilience, and inclusive growth across Aberdeenshire, particularly in response to the decline of the oil and gas sector. Key priorities include: - Transition to a low-carbon economy; - Business support and innovation; - Place-based development, enhancing town centres, infrastructure, and connectivity; - Skills and workforce development; and - Regional collaboration, working with Aberdeen City and other partners through the City Region Deal and shared strategic frameworks. The strategy recognises the need to balance economic growth with environmental sustainability, and to support communities affected by industrial transition. It is considered in Section 18.10 of the chapter (GVA and Employment).
Angus Council (2016) Angus Local Development Plan	This strategy was approved in 2012 and sets out a vision to 2032. It aligns this vision with community priorities, such as: protecting the local environment; preserving resources; improving heat and energy networks, housing and local services. Angus is a key focal point for major renewable energy generation. The plan highlights the need for this infrastructure to be guided by strategic planning and development, for instance, selecting locations which minimise car travel and promote the most economic opportunity, to ensure this development aligns with community priorities. The strategy also recognises that Montrose Port has an important role in offshore wind development, identified as a Strategic Development Area. Plans for regeneration and improved access near the port have been developed to improve accessibility and promote private investment into the area. This chapter assesses any socio-economic impacts in Montrose, due to its proximity to the port and the potential for increased activity area as result of the Proposed Development. This includes the impact of labour movement and potential disruption to the local area, which may infringe on the socio-cultural values of the community. This is considered in Section 18.10 of the chapter (changes to demographics and socio-cultural impacts).

Table 18.3: Summary of Policy Relevant to Socio-Economics, Tourism and Recreation

Policy Document	Relevance to the Socio-Economics, Tourism and Recreation assessment
Local Policy Context	
Gourdon Community Action Plan 2017[2]	The Plan is developed and facilitated by Kincardineshire Development Partnership, as part of Aberdeenshire's rural partnerships framework and aims to guide development actions for up to three years, with regular review to ensure relevance. Residents highlighted that in Gourdon they value community spirit and friendliness, the scenic harbour, beach, coastal paths and heritage, local facilities, and the peacefulness and safety of the village. The plan outlines specific actions across several categories, including: - Improving public spaces (cleanliness, signage, lighting, harbour safety) - Developing community facilities (toilets, café, gardens, youth amenities) - Enhancing sport and recreation (MUGA, tennis court renewal) - Economic resilience (fuel clubs, local business support, tourism collaboration) - Civic engagement (youth involvement, volunteer recruitment) Section 18.10 of this chapter reviews whether the Proposed Development could affect socio-cultural character, in relation to the values that are important to local communities.

[2] Although this action plan is now out of date, it is the most up-to-date version available in the public domain and is therefore used for reference.

18.4 Consultation

18.4.1 The approach to consultation for the Proposed Development is set out in Volume 1, Chapter 5: Consultation and Engagement. A summary of the issues raised during consultation activities undertaken to date specific to Socio-Economics, Tourism and Recreation is presented in Table 18.4 together with how these issues have been considered in the production of this assessment. Further detail is presented within Volume 1, Chapter 5: Consultation and Engagement, Volume 3, Technical Appendix 5.1: Consultation Log and Volume 3, Technical Appendix 5.2: Pre-Application Consultation Report.

18.4.2 Relevant consultation undertaken for the onshore infrastructure is described in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

Table 18.4: Summary of key consultation issues raised during consultation activities undertaken for the Proposed Development relevant to Socio-Economics, Tourism and Recreation

Date	Consultee and Type of Consultation	Summary of Issue(s) Raised	Response to Issue Raised and/or Where Considered in this Chapter
25/11/2025	MD-LOT/ Marine Analytical Unit (MAU) Scoping Opinion	Scottish Ministers and MAU advise that the assessment of socio-economic impacts would benefit from the inclusion of a shortlist of potential epicentres of impact.	Potential epicentres of impact are outlined in Table 18.2: Study Areas for the Assessment Topics.
		Scottish Ministers and MAU advise the Developer that a full SEIA should be included within the EIA Report.	A separate SEIA has been prepared which comprises both onshore and offshore elements of the project, and is included as Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore) within this EIA report.
		Scottish Ministers advise that the most up-to-date data sources should be used for all analysis.	The assessment has sought to utilise the most up-to-date data sources for analysis where available. A full list of data sources is provided in Section 18.1.
		Scottish Ministers and MAU disagree with the scoping out of socio-cultural impacts during the decommissioning phase.	Socio-cultural impacts during decommissioning have been included in the assessment for the Proposed Development. Socio-cultural impacts were scoped out for decommissioning for the onshore infrastructure, as explained in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).
		Scottish Ministers and MAU advise the assessment should take into account deadweight, leakage, displacement and substitution and that sensitivity analysis will be performed.	A comprehensive economic assessment methodology, covering all components of economic analysis and appraisal, is provided in Volume 3, Technical Appendix 18.2: Socio-Economics Quantitative Assessment Methodology.
		Scottish Ministers recommend the Developer includes additional analysis regarding potential job creation in comparison to existing jobs in the study area in the EIA Report.	The economic assessment includes an assessment of employment created during the construction, O&M and decommissioning phases of the Project.
		Scottish Ministers advise the use of social researchers with experience in qualitative	Several groups are already considering issues that are of interest to the sector as a whole, such as port infrastructure and skills, and are in the process of developing programmes

Date	Consultee and Type of Consultation	Summary of Issue(s) Raised	Response to Issue Raised and/or Where Considered in this Chapter
		methods to conduct research and primary data collection with communities.	around collaborative socio-economic impacts. A report, National Assessment of Socioeconomic Issues and Opportunities for Offshore Wind Scoping Report (BiGGAR Economics, 2025), commissioned on behalf of the Scottish Offshore Wind Energy Council (SOWEC) for the Crown Estate Scotland sets out an approach to achieve this. It assesses the potential economic impacts of the sector, identifies the areas that are most likely to experience changes, and provides an approach to place communities at the centre of decision-making in the sector. Recommendations include an extensive social research engagement programme with communities affected by offshore wind development as well as socio-economic research on demographics, housing and public and private services. The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations.
	MAU – Scoping Opinion	MAU note suggestion to discuss hypothetical areas of impact and undertake analysis using a range of port location scenarios, such as those in rural and urban location.	At the time of undertaking the assessment, the location of the ports to be used for construction, O&M and decommissioning of the Proposed Development are not known. This precludes an assessment of demographic change on specific host communities at this stage. Instead, two modelled scenarios have been developed - a rural port location and an urban port location.
		MAU state that stakeholder mapping is required to identify all who may be affected.	Relevant stakeholders have been considered within the assessment in terms of those who may be affected by the Proposed Development; such as fishers, recreational users, tourists, and local communities. A PAC Report has been submitted as a supporting document to this application (and the Bowdun OWF Onshore EIA Report (BOWFL, 2025). This report documents the PAC process in full, detailing how the Applicant has consulted with the public and stakeholders, including copies of materials used and photographs of exhibitions as well as a summary of attendance and the

Date	Consultee and Type of Consultation	Summary of Issue(s) Raised	Response to Issue Raised and/or Where Considered in this Chapter
			feedback received. A full summary of consultation feedback is provided in Volume 2, Chapter 5: Stakeholder Engagement and Consultation.
		MAU suggest considering potential secondary socio-economic impacts of any changes the affect the other relevant receptor groups covered in the wider EIA.	Secondary socio-economic impacts have been considered in the assessment of impacts on tourism and recreation receptors presented in this chapter.
		MAU suggest defining potential impact area on land taking into account locations and connections between activities.	The assessment has considered how the offshore activities affect land-based economic, social and tourism factors. Study areas and epicentres of impact are outlined in Table 18.2. Impacts arising from the onshore infrastructure are assessed in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025)
		MAU require consideration of cumulative effect of multiple offshore developments.	A Cumulative Effects Assessment (CEA) is provided in Section 18.12 of this chapter.

18.4.3 During preparation of this chapter, feedback was received from Aberdeenshire Council on the Bowdun OWF Onshore EIA Report (BOWFL, 2025). The feedback highlighted the need for the Applicant to show how it is contributing toward the Council's Community Wealth Building Principles. A description of how Aberdeenshire Council's Community Wealth Building Principles have been addressed by the Project is provided in Table 18.5.

Table 18.5: Aberdeenshire Council Community Wealth Building Principles and how addressed by Project

Criteria	Description	How addressed by Project
Provide a long-term and collaborative programme on skills development	Within Aberdeenshire in partnership with appropriate organisations such as Aberdeen Science Centre, Macduff Marine Aquarium, Developing the Young Workforce, colleges, universities and Employability Partnerships. This is intended to maximise local job opportunities from developments, retain talent within the region and maintain Aberdeenshire's demographic balance. Provide structured approaches to Apprentices, interns, work placements, and work experience pathways throughout the supply chain. Linkages and strategic connections with academies and further education providers will enable maximum visibility with future workforces.	The Applicant outlined a commitment in their 2023 Supply Chain Development Statement (SCDS) to work with governments, trade bodies, policy-makers, industry and the education sector to offer greater support to educational establishments, adult education centres for retraining and career transition, as well as support for port and supply chain development. The Applicant has undertaken numerous STEM initiatives in Aberdeenshire, described in further detail in Paragraph 18.6.44 to 18.6.46.
Community Capacity	It is anticipated that significant community benefit funds may be available within Aberdeenshire. We ask that developers acknowledge the importance of communities being able to generate income / wealth through the management of assets and that any community benefit funds take cognisance of the models and various capacities to do this. There is a disparity between those well organised and ambitious communities and those less so, which creates an uneven and unfair basis for achieving legacy development. Contributions and collaboration are encouraged towards strategic partnerships with local organisations that can work with communities and provide continuity of support to develop capacity in those areas that are less able to organise and deliver substantial projects. This list is not exhaustive but could include for example Rural Partnerships, AVA, NESCAN, DTAs etc.	Provision of a community benefit fund and/or shared ownership which may be linked to operational performance of the wind farm is actively being considered for the Project. Further details are provided in Paragraph 18.6.43.
Fuel Poverty	Energy developments form part of our transition to net zero, and yet in particular places impacted by large scale infrastructure, e.g. Peterhead, residents experience the impacts of serious fuel poverty. Developers are encouraged to consider how they can support the communities impacted by their infrastructure to develop long term solutions to fuel poverty.	Provision of a community benefit fund and/or shared ownership which may be linked to operational performance of the wind farm is actively being considered for the Project. This could be used by the community to address local concerns and priorities. Further details are provided in Paragraph 18.6.43.
Supply Chain	Develop opportunities for local Aberdeenshire companies to supply goods and services to the developments during	The Applicant will work with other developers, Government, and key stakeholders to assist in addressing barriers to local

Criteria	Description	How addressed by Project
	construction and operation. Supply chain events and frameworks for potential contracts should be advertised and marketed in sufficient time to elicit appropriate responses. Providing long lead in times provides confidence to local companies on the availability of markets to enable them to invest in the appropriate resources to deliver.	supply chain participation. The SCDS notes the global experience of their founder companies in building local supply chains and pledged that, in its approach to procurement for its ScotWind projects, they will consider offerings from local businesses and market entrants as well as from established UK businesses for construction and O&M. The Applicant has held supplier events, such as the UK Offshore Wind Supplier Spotlight and the Bowdun Offshore Windfarm supply chain event, which focused on unlocking supply chain opportunities through supplier engagement. More information on supply chain development can be found in Paragraphs 18.6.13 to 18.6.16.
Inward Investment	Where local content is unavailable, and contract is of sufficient length, consider promoting and negotiating with supply chains their inward investment into Aberdeenshire.	The SCDS (BOWFL, 2023; 2026) outlines expenditure targets of the Project in Scotland, the rest of the UK, and the rest of the world. Project expenditure in Scottish and UK supply chains will generate inward investment into the local area, by creating partnerships with local suppliers and businesses, and through both the direct and indirect economic benefits generated by an influx of workers into the local area. The SCDS (TWP, 2023) notes how the Applicant has supported the development of a Strategic Investment Model (SIM), a mechanism to support investment in major manufacturing and to enable infrastructure projects in Scotland. A refresh of the Bowdun OWF SCDS has been undertaken in early 2026 to reflect the changing investment and supply chain landscape. Further details are provided in Paragraphs 18.8.24 to 18.8.25.
Adopt a town centre first approach	To contract investment and the utilisation of existing built assets, acknowledging the embedded carbon in existing infrastructure**.** Our town centres in particular are best placed to provide project offices and welfare facilities, are strategic investment locations and are visible and accessible to local communities and workforces.	The Project is likely to increase economic activity in settlements local to port locations, which is likely to provide indirect benefits to existing local infrastructure. Once the port locations are selected, an additional assessment will be undertaken informed by community engagement, to identify any actions required to limit potential adverse impacts and provide benefits for local communities, where practicable (refer to Paragraph 18.10.138). The Applicant will retain involvement with Scottish Offshore Wind Energy Council

Criteria	Description	How addressed by Project
		(SOWEC) and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations. The Applicant will also consider the siting of a project office in construction port town(s) where practicable.
Place	Aberdeenshire Council and our Community Planning Partners have agreed to a new Place Policy. A Place Plan will be Co-designed in every town hosting an academy. These Place Plans will indicate the community's priorities, the legacy of developments, short, medium and longer term actions and priorities. Developers are encouraged to take a lead from these plans in terms of legacy community benefits.	Local Development Plans have been considered, and appropriate mitigation measures will be adopted to limit any potential adverse impacts on local communities. Community consultation (PAC) was carried out in settlements local to the onshore infrastructure, identifying any concerns or priorities within the communities. These communities are listed in the Volume 1, Chapter 5: Consultation and Engagement. The PAC Report followed the principles of Aberdeenshire Council's Planning Advice. Furthermore, a Woodland Management Plan (for the Onshore Infrastructure) and Project-wide Accommodation Strategy is being developed to mediate any impacts on local recreational assets, the housing market, local infrastructure and services. Coastal and marine assets and related businesses such as fishing, are core to the sense of place, economy and way of life. Appropriate mitigation will be carried out, such as the Navigational Safety and Vessel Management Plan (NSVMP) and the Fisheries Mitigation, Monitoring and Communication Plan (FMMCP), to limit impacts on marine recreation and the local fishing industry. Provision of a community benefit fund and/or shared ownership which may be linked to operational performance of the wind farm is actively being considered for the Project. Further details are provided in Paragraph 18.6.43.

18.5 Data Sources

Desktop Study

18.5.1 Information on the baseline in the Socio-Economics, Tourism and Recreation Study Areas were collected through a detailed desktop review of existing studies and datasets which are detailed in Volume 3, Technical Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline. A description of data sources used in the assessment is shown in Table 18.6.

Table 18.6: Socio-Economic, Tourism and Recreation Data Sources

Sub-topic	Source	Extent	Description	Year Published	Author
GVA, Skills and Employment					
Turnover	Annual Business Survey	Scotland	Breakdown of sectoral turnover	2024	Scottish Government
Employment	Annual Population Survey	Scotland	Data on economic activity, unemployment, and qualifications	2023	Office for National Statistics
Employment	Job estimates for wind generation by 2030: methodology note	UK	Evidenced-based estimates for jobs in both offshore and onshore wind.	2025	UK Government
Employment	Scotland Employment Figures	Scotland	Data on quarterly employment levels	2025	Statista
Employment	UK Labour Market Statistics	UK	Data on UK employment numbers, workforce size and employment rates	2025	UK Parliament
Employment	Energy Industry Sector	Aberdeenshire	Information on the key energy hubs in Aberdeenshire, for instance Peterhead	n.d.	Aberdeenshire Council
Income	Annual Survey of Hours and Earnings 2022	UK	Data on average and median earnings	2023	Office for National Statistics
Income	Cities Outlook 2025	UK	2024 data on productivity, wages and population across UK cities	2025	Centre for Cities
Income	Household Income in Aberdeenshire Report	Aberdeenshire	Data on household incomes and income growth in local settlements	2025	Aberdeenshire Council
Income	Mapping Inequality in the UK	UK	Data on regional variation in income and productivity	2021	Office for National Statistics
Economic Growth and GVA	Scottish Annual Business Statistics 2023	Scotland	Data on GVA, with sectoral breakdowns	2025	Scottish Government

Sub-topic	Source	Extent	Description	Year Published	Author
Economic Growth and GVA	Sub-Scotland Economic Statistics Database 2023	Scotland	Economic, business, labour market and population data for Scotland, and areas within Scotland	2025	Scottish Government
Economic Growth and GVA	Scotland's Marine Economic Statistics 2023	Scotland	Statistics on the economic contributions of Scotland's marine sectors	2025	Scottish Government
Economic Growth and GVA	Gross Value Added (GVA)	UK	Data on UK GVA on a quarterly basis, including GVA methodology	2025	Office for National Statistics
Economic Growth and GVA	Regional gross value added (balanced) by industry and local authority: all ITL regions, sheet 3	UK	Data on GVA by industry and local authority	2023	Office for National Statistics
Economic Growth and GVA	Aberdeenshire Council Strategic Assessment 2024/2025	Aberdeenshire and Aberdeen City	Data on projections of sectoral GVA and economic growth	2024	Aberdeenshire Council
Economic Growth and GVA	Key Sectors	Angus	Data on GVA per head and regional turnover	2022	Invest In Angus
Skills & Workforce	Official Census and Labour Market Profiles	UK	Data on labour demand and the labour market profile	2025	NOMIS
Skills & Workforce	Offshore Wind Skills Intelligence Report	UK	Understanding of skills and future workforce for the offshore wind industry	2023	Offshore Wind Industry Council
Skills & Workforce	Energy Skills Intelligence Hub – UK Energy Sector at a Glance	UK	Breakdown of energy sector by employment and skill level	2024	Energy Skills Intelligence Hub
Skills & Workforce	Department for Energy Security and Net Zero (DESNZ)	Aberdeenshire and Aberdeen City	Press Release on investment into reskilling the energy sector workforce	2025	UK Government
Skills & Workforce	Angus Council News	Angus	Information on new skills academy in Montrose	2024	Angus Council

Sub-topic	Source	Extent	Description	Year Published	Author
Skills & Workforce	North East Scotland: Offshore Wind Report	Aberdeenshire and Aberdeen City	Forecasts the role of Aberdeenshire in the green energy transition	n.d.	Invest Aberdeen
Skills & Workforce	Employment in the Oil and Gas Industry: Scottish Energy Statistics Hub	Aberdeenshire and Aberdeen City	Employment statistics for the Scottish oil and gas industry	2025	State of the Coast
Skills & Workforce	Workforce Insight Report	Scotland	Data on the reskilling ability of the workforce	2023	Offshore Energies UK (OEUK)
Skills & Workforce	A Just Transition for Aberdeen and the North East Report	Aberdeenshire and Aberdeen City	Reports on key concerns for the future of the region and potential mitigation	2025	Just Transition Commission
Skills & Workforce	Regional Planning for a Just Transition: A Case Study for the North East of Scotland	Aberdeenshire and Aberdeen City	Report summarising the key considerations for planning within the region as well as employment forecasts	2025	Just Transition Commission
Skills & Workforce	Written evidence submitted by Port of Aberdeen	Aberdeen City	Information on turnover and employment of the Port of Aberdeene	2025	UK Parliament
Skills & Workforce	Annual Report 2025	Inverness	Information on the Port of Inverness and its economic impact in the area	2025	Port of Inverness
Skills & Workforce	Montrose Port Authority Draft Masterplan	Angus	Information on the port of Montrose	2025	Montrose Port Authority
Skills & Workforce	Energy Industry Sector	Peterhead	Information on the port of Peterhead	n.d.	Aberdeenshire Council
Skills & Workforce	UK Regional Economic Forecast 2025	Scotland	Projections for GVA and employment	2025	EY UK
Skills & Workforce	Regional Skills Assessments	Scotland	Projections for GVA, productivity and workforce size, broken down by industry	2025	Skills Development Scotland

Sub-topic	Source	Extent	Description	Year Published	Author
Model	Scottish Annual Business Statistics 2022	Scotland	Data relating to the Production, Construction and Service Sectors in Scotland	2024	Scottish Government
Model	Supply, Use and Input-Output Tables: 1998-2021	Scotland	The Supply, Use and analytical Input-Output Tables produced by the Scottish Government	2024	Scottish Government
Model	Region – Business Register and Employment Survey: Table 3	UK	Annual employee and employment estimates for Great Britain and UK split by region.	2025	Office for National Statistics
Model	Table 1c - Regional gross value added (balanced) by industry: all ITL regions	UK	Annual estimates of balanced UK regional gross value added (GVA(B)).	2025	Office for National Statistics
Model	Business Register and Employment Survey	UK	Open access, ONS Crown Copyright Reserved	2025	Office for National Statistics (NOMIS)
Model	FTE_105_Industries-2022 edition of this dataset	UK	Employment multipliers and effects in the UK, ONS	2025	Office for National Statistics
Model	UK input-output analytical tables: industry by industry	UK	Includes industry by industry and further analysis tables derived from the annual Supply and Use Tables (SUTs).	2025	Office for National Statistics
Model	Regional gross disposable household income: all International Territorial Level (ITL) regions	UK	Estimates of UK regional gross disposable household income (GDHI) at current prices for ITL1, ITL2 and ITL3 regions.	2025	Office for National Statistics
Model	Industry (two, three and five-digit Standard Industrial Classification (SIC)) – Business Register and	UK	Annual employee and employment estimates for Great Britain and UK split by two, three and five-digit Standard Industrial Classification: SIC 2007.	2024	Office for National Statistics

Sub-topic	Source	Extent	Description	Year Published	Author
	Employment Survey (BRES): Table 2				
Model	Cost associated with each element of the proposed development.	UK	A guide that describes the stages, activities and costs of the development of an offshore windfarm.	2025	BVG Associates
Demographic Changes					
Population	Mid-2023 Electoral Ward Population Estimates	Scotland	The number of people living in the local area	2024	National Records of Scotland
Population	Population Statistics	Scotland	Annual population of Aberdeenshire, and 2022 populations of wards and towns	2024	Aberdeenshire Council
Population Projections	2022-Based Population Projections of Scotland	Scotland	Estimates of future population size and structure based on current data and assumptions about demographic trends	2025	National Records of Scotland
Population Projections	Council Area Profiles: Aberdeenshire	Scotland	Data on population and future forecasts	2025	National Records of Scotland
Population Projections	Aberdeenshire Joint Strategic Needs Assessment 2024	Aberdeenshire and Aberdeen City	Reports the regional trends in population, demographics and deprivation	2024	Aberdeenshire Health and Social Care Partnership
Potential Workforce and Population Changes	Construction Organograms - Bowdun	Aberdeenshire, Aberdeen City, and Angus	Details the proportion of new job roles which will be fulfilled by workers from the local area in comparison to the proportion which require workers to move to the area	n.d.	Thistle Wind Partners (TWP)
Geographic Area	Travel to Work Area (TTWA) Analysis in Great Britain	UK	Information on the 2011 TTWAs in GB	2016	Office for National Statistics
Deprivation					
SIMD	Scottish Index of Multiple Deprivation (SIMD)	Scotland	SIMD is an area-based measure of relative deprivation	2020	Scottish Government

Sub-topic	Source	Extent	Description	Year Published	Author
Deprivation	Population Needs Assessment	Aberdeen City	Provides insight into regional poverty and deprivation	2021	Community Planning Aberdeen
Deprivation	Population Needs Assessment	Aberdeen City	Provides insight into regional poverty and deprivation	2023	Community Planning Aberdeen
Inequality	Employment, Earnings and Incomes in Scotland	Scotland	Breakdown of the variation in household earnings across Scotland	2023	The Institute for Fiscal Studies
Inequality	Aberdeenshire Council Strategic Assessment 2024/2025	Aberdeenshire and Aberdeen City	Provides insight into deprivation levels and potential future concerns	2024	Aberdeenshire Council
Poverty	Aberdeenshire Child Poverty Action Report 2023-24	Aberdeenshire and Aberdeen City	Insight on drivers on inequality in the region and data on child poverty	2024	Aberdeenshire Council
Supply Chain					
Supply Chain Strategy	Bowdun Offshore Wind Farm: Supply Chain Development Statement	North East Scotland	Information on supply chain targets and the process of how supply chains will be developed	2026	TWP
Supply Chain Capabilities	North East Scotland: Offshore Wind Report	Aberdeenshire and Aberdeen City	Information on the region's history in offshore wind and existing supply chain which will help support expansion in the sector	n.d.	Invest Aberdeen
Changes to Housing Demand and Supply					
Real Estate	Housing Need & Demand Assessment 3	Aberdeenshire and Aberdeen City	The existing housing needs, demands and stock profile	2023	Aberdeenshire city council, Aberdeenshire council
Real Estate	Housing Contribution Statement	Angus	Data on dwelling types and vacant stock in the North Housing Area of Angus	2023	Angus Council
Real Estate	Housing Developments	Angus	Information on new housing developments in the local authority	n.d.	Angus Council

Sub-topic	Source	Extent	Description	Year Published	Author
Real Estate	Aberdeenshire Housing Market Report	Aberdeenshire	Data on dwelling types and house prices in Aberdeenshire	2024	Aberdeenshire Council
Real Estate	Housing Land Audit 2025	Aberdeen City and Aberdeenshire	Data on housing completions in the two local authorities	2025	Aberdeenshire city council, Aberdeenshire council
Prices	Housing prices	Aberdeen City, Aberdeenshire, Angus	How average house prices and rents are changing in Aberdeen	2025	Office for National Statistics
Prices	UK House Price Index Scotland	Scotland	Average house prices	2025	HM Land Registry
Prices	Housing prices	UK	Average house prices and rents	n.d.	Office for National Statistics
Vacant Housing	Households and Dwellings in Scotland	Scotland	Data on vacant stock and Long-Term Empty (LTE) homes	2024	National Records of Scotland
Area Profile	Aberdeenshire Area Profile: Data tables 2023	Aberdeenshire	Data tables show housing stock statistics	2023	Aberdeenshire Council
Private Rented Accommodation	Local Housing Strategy 2025-2030	Aberdeen City	Insight into the importance of the private rental sector in Aberdeen and other key housing considerations	2025	Aberdeen City Council
Housing Projections	Strategic Housing Investment Plan 2026-2030	Aberdeenshire	Forecasts of housing development plans	2025	Aberdeenshire Council
Housing Projections	Local Housing Strategy 2023-2028	Angus	Forecasts of housing development plans	2023	Angus Council
Changes to demand for housing and local services					
Guidance	Guidance on assessing the socio-economic impacts of Offshore Wind Farms (OWFs)	UK	Guidance on the assessment of offshore windfarm developments	2020	Oxford Brookes University

Sub-topic	Source	Extent	Description	Year Published	Author
Local Development Plans	Aberdeen City and Shire Strategic Development Plan	Aberdeenshire and Aberdeen City	Information on new housing, infrastructure and economic developments in the region	2020	Strategic Development Planning Authority
Local Development Plans	Report to Infrastructure Services Committee: Aberdeenshire Local Development Plan 2029	Aberdeenshire	A look forward towards future trends and challenges which need to be tackled within the region	2025	Aberdeenshire Council
Employment	Regional Skills Assessment	Aberdeenshire and Aberdeen City	Breakdown of sectoral employment and implications of reskilling energy sector workforce	2024	Skills Development Scotland
Potential Workforce and Population Changes	Construction Organograms - Bowdun	Aberdeenshire and Aberdeen City	Details the proportion of new job roles which will be fulfilled by workers from the local area in comparison to the proportion which require workers to move to the area	n.d.	TWP
Education	Summary statistics for schools in Scotland 2024	Scotland	Headline statistics on teachers, pupils, attendance, and early learning and childcare provision in Scotland	2024	Scottish Government
Education	School Roll Long Range Projections	Angus	School roll statistics	2022	Angus Council
Education	School Details	Aberdeenshire	Details the quantity, names, and locations of schools in the region	2025	Aberdeenshire Council
Education	2024/25 Based School Roll Forecasts	Aberdeenshire	Data on the number of pupils at schools and capacity projections	2024	Aberdeenshire Council
Education	2024 Based School Roll Forecasts	Aberdeen City	Data on the number of pupils at schools and capacity projections	2024	Aberdeen City Council
Healthcare	Health Performance	Scotland	Data on NHS Health Board performance across Scotland	2025	Scottish Parliament
Healthcare	Press and Journal	Aberdeenshire and Aberdeen City	Article on the current ambulance crisis in Aberdeen City and Shire	2025	Rutherford and Sabljak

Sub-topic	Source	Extent	Description	Year Published	Author
Healthcare	Tayside Health Board Annual Report and Accounts	Angus	Information on the NHS board performance in 2024/25	2025	NHS Tayside
Police Services	Performance against Local Policing Plan 2023-26	Aberdeen City	Information on the provision of police services	2025	Police Scotland
Police Services	Aberdeenshire Local Policing Plan 2023-2026	Aberdeenshire	Information on the provision of police services	2023	Police Scotland
Police Services	Angus Council Scrutiny and Audit Committee Q1 2025	Angus	Information on the provision of police services	2025	Police Scotland
Fire and Rescue Services	Scottish Fire and Rescue Service Performance Reports	Aberdeenshire and Aberdeen City	Covering the activities and performance in support of the Local Fire and Rescue Plan	2021-2025	Scottish Fire and Rescue
Fire and Rescue Services	2024-25 Q4 Scrutiny Report	Angus	Data on current fire incidents and casualties in Angus wards	2025	Angus Council
Changes to Tourism and Recreation					
Overnight Visitors	Centre for Cities	Aberdeenshire and Aberdeen City	Spending by overnight visitors	2024	Aberdeenshire Council
Number of Visitors, Tourism Employment and Economic Impact	Global Tourism Solutions	Aberdeenshire and Aberdeen City	Data on the number of visitors and the economic impact of tourism in Aberdeenshire, including tourism employment	2025	Opportunity North East
Number of Visitors, Tourism Employment and Economic Impact	Economic impact of tourism continues to rise year on year in Angus	Angus	Data on visitor numbers and the tourism economy in Angus	2025	Invest In Angus

Sub-topic	Source	Extent	Description	Year Published	Author
Tourism Businesses and Turnover	Visit Scotland – Research Insights	Aberdeenshire and Aberdeen City	Data on tourism employment, number of businesses, turnover and GVA	2024	Visit Scotland
Tourism Businesses and Turnover	Aberdeen tops Scottish ‘Fun City’ Ranking amidst surging tourism	Aberdeen City	Article on tourism boom in 2025 due to cruise demand	2026	Aberdeen Business News
Marine Tourism	Scotland’s Marine Economic Statistics 2023	Scotland	Data on the national and regional marine economy	2025	Scottish Government
Marine Recreation	Scottish Marine Recreation & Tourism Survey 2015	Scotland	Survey data on marine recreation activities and preferences	2015	Marine Directorate
Marine Recreation	Coastal Assets	Scotland	Data on the coastal economy in Scotland	n.d.	The James Hutton Institute
Visitor Demographics	Scotland Visitor Survey	Scotland	Data on tourist demographics, tourist accommodation preferences, and the uptake of tourist activities	2023	Visit Scotland
Tourist Sites of Interest	Things to do in Aberdeenshire	Aberdeenshire, Mearns, Stonehaven, Peterhead	Information on key tourist attractions in Aberdeenshire	n.d.	Visit Aberdeenshire
Tourist Sites of Interest and Tourism Accommodation	Tourism – Engage Angus	Angus	Report detailing key drivers of tourism and tourism accommodation uptake	2024	Angus Council
Tourism Accommodation	Aberdeenshire Accommodation Audit 2023	Aberdeenshire	Breakdowns of tourism accommodation across regions in Aberdeenshire	2023	Visit Aberdeenshire
Tourism Accommodation	Aberdeen City Accommodation Audit 2023	Aberdeen City	Breakdowns of tourism accommodation in Aberdeen City	2023	Visit Aberdeenshire

Sub-topic	Source	Extent	Description	Year Published	Author
Tourism Accommodation	Scottish Accommodation Occupancy Survey 2024	Scotland	Data on demand for types of tourism accommodation for 2023-2024.	2024	Visit Scotland
Tourist Perceptions	Offshore Wind Farm Construction and Tourism	England	Evidence on the relationship between offshore wind farm construction and the local tourism sector in England.	2020	Biggar Economics
Tourist Perceptions	Offshore Wind Farm Developments – Public Perceptions (Survey)	Scotland	Findings from a survey exploring public perceptions of OWF developments in Scotland	2022	Scottish Government
Socio-cultural Impacts					
Community Wellbeing	Social capital and community wellbeing in Scotland Report	Scotland	Information about the extent and nature of social connections and social capital from 2018/2019 - 2022	2024	Scottish Government
Social Capital	Social Capital in Scotland: Measuring and understanding Scotland's social connections	Scotland	Examines social connections within Scottish communities and ideas for improvement	2020	Scottish Government
Socio-cultural Values	Council Vision	Aberdeenshire	Information on the priorities of the local council to promote quality of life	n.d.	Aberdeenshire Council
Socio-cultural Values	Inverbervie Community Learning Project Report December 2024	Mearns	Information on the priorities of the settlement	2024	Aberdeenshire Council
Socio-cultural Values	Gourdon Community Learning Project Report December 2024	Mearns	Information on the priorities of the settlement	2024	Aberdeenshire Council
Socio-cultural Values	Angus Community Plan 2022-2030	Angus	Information on community values and priorities	2023	Angus Community Planning Partnership
Socio-cultural Values	Brechin/Montrose Locality Plan	Angus	Information on community values and priorities	2017	Angus Council

Sub-topic	Source	Extent	Description	Year Published	Author
Socio-cultural Values	Aberdeenshire Coastal Change Adaption Plan – Regional Plan	Aberdeenshire	Information on the challenges facing coastal communities and areas for mitigation	2025	Aberdeenshire Council
Socio-cultural Values	Angus Shoreline Management Plan SMP2	Angus	Information on the challenges facing coastal communities and areas for mitigation	2016	Angus Council
Socio-cultural Values	Internal migration in Scotland and the UK: trends and policy lessons	Scotland	Data on national migration	2020	Scottish Government
Guidance	Guidance on assessing the socio-economic impacts of OWFs	UK	Guidance on the assessment of offshore windfarm developments	2020	Oxford Brookes University

18.6 Baseline Environment

18.6.1 This section provides the baseline context for the Socio-Economics, Tourism and Recreation assessment for the study areas identified in Table 18.2. Further baseline detail is provided in Volume 3, Technical Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline.

GVA and Employment

18.6.2 This section sets out the baseline context for GVA and employment for the Project as a whole, for both the onshore and the offshore elements.

Overview

18.6.3 Data on Gross Value Added (GVA) and employment for the UK, Scotland, Aberdeenshire, Aberdeen City, and Angus (the Regional Socio-Economic Study Area) are summarised in Table 18.7.

Table 18.7: GVA (Current Prices) and Employment (Office for National Statistics, 2025; Scottish Government, 2025)

	Aberdeenshire	Aberdeen City	Angus	Regional Socio-Economics Study Area	Scotland	UK
GVA	£7.3 billion	£11.1 billion	£2.5 billion	£31.57 billion	£183.5 billion	£2,601.6 billion
Employment	135,500	123,500	51,800	310,800	2.7 million	34.2 million

18.6.4 Across Scotland, between 2022 and 2023, aGVA (GVA at basic prices) for the non-financial business economy decreased by £3.9 billion (-3.1%), driven by a decline in Primary Industries (which includes the oil and gas sector). In 2023, the Primary Industries sector accounted for an estimated £27.7 billion of total non-financial business economy aGVA (22.9%) (Scottish Government, 2025). Furthermore, GVA output varied between cities and rural areas. With 34% of Scotland's GVA (£183.5 billion – see Table 18.7) produced in larger cities in 2023, accumulated by 50,960 private sector businesses, whereas only 22% was produced in 'mainly rural' areas, despite a large number (59,815) of private sector businesses situated in these areas (Scottish Government, 2025).

18.6.5 Table 18.8 compares the labour market of the local authorities in the Regional Socio-Economics Study Area to national averages. Key indicators include employment rates, GVA per hours worked (GVA/h), Gross Domestic Product (GDP) per head, and the proportion of individuals with Regulated Qualifications Framework Level 4 and above (RQF4+) qualifications, which are qualifications equivalent to a first year of a bachelor's degree.

Table 18.8: Labour Market Indicators - Regional Socio-Economics Study Area Local Authorities (Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025; Office for National Statistics, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Employment Rate, 2025	74.4%	76.4 %	69.9%	74.4%
Economic Inactivity, 2025	22.7%	21.6%	26.7%	22.7%
Unemployment Rate, 2024	2.5%	3.9%	3.2%	3.7%
Gross Weekly Pay, by Place of Residence, 2025	£824.80	£781.70	£748.10	£775.6
Claimant Count, 2024	1.8%	3.2%	2.8%	3.1%
GVA/h, 2023	£37.3	£39.3	£39.9	£41.3
RQF4 and Above Qualifications, 2024	58.8%	62.4%	51.6%	53.7%
No Qualification, 2024	N/A	4.8%	8.6%	8.2%
GDP per head, 2023	£31,115	£52,583	£25,918	£37,192

18.6.6 Generally, gross weekly pay and qualification levels in Aberdeen City and Aberdeenshire are higher than Scottish averages. Furthermore, council reports show average household incomes in Aberdeenshire (£45,853) were greater than in Scotland (£39,386) in 2024 (Aberdeenshire Council, 2025). Whereas economic activity, qualification levels and gross weekly pay in Angus were lower than that of Scotland, Aberdeenshire and Aberdeen.

18.6.7 Table 18.9 displays the industries which contributes the most to GVA and employment in Aberdeenshire, Aberdeen City, and Angus in comparison to Scottish averages.

Table 18.9: Highest Contributing Industries to GVA and Employment – Regional Socio-Economics Study Area Local Authorities (Office for National Statistics, 2023; Office for National Statistics, 2025)

	Aberdeenshire	Scotland Average
GVA, 2023	Real Estate Activities (£1,098m); Manufacturing (£1,023m); Professional, Scientific, and Technical Activities (£979m)	Real Estate Activities (£22,259m); Manufacturing (£18,224m); Professional, Scientific, and Technical Activities (£12,170m)
Employment, 2025	Wholesale and Retail Trade (14.3%); Manufacturing (13.3%); Professional, Scientific, and Technical Activities (10.2%)	Wholesale and Retail Trade (12.7%); Manufacturing (7.1%); Professional, Scientific, and Technical Activities (7.2%)
	Aberdeen City	**Scotland Average**

	Aberdeenshire	Scotland Average
GVA, 2023	Professional, Scientific, and Technical Activities (£1,551m); Human Health and Social Work (£1,382m); Agriculture, Forestry and Fishing; Mining and Quarrying (£1,046m)	Professional, Scientific, and Technical Activities (£12,170m); Human Health and Social Work (£20,658m); Agriculture, Forestry and Fishing; Mining and Quarrying (£4,391m)
Employment, 2025	Human Health and Social Work (16.5%); Professional, Scientific, and Technical Activities (13.3%); Mining and Quarrying (12.7%)	Human Health and Social Work (16.7%); Professional, Scientific, and Technical Activities (7.2%); Mining and Quarrying (1.0%)
	Angus	**Scotland Average**
GVA, 2023	Manufacturing (£859m); Real Estate Activities (£379m); Human Health and Social Work (£249m)	Manufacturing (£18,224m); Real Estate Activities (£22,259m); Human Health and Social Work (£20,658m)
Employment, 2025	Wholesale and Retail Trade (15.2%); Human Health and Social Work (18.2%); Manufacturing (13.6%)	Wholesale and Retail Trade (12.7%); Human Health and Social Work (16.7%); Manufacturing (7.1%)

Marine Economy

18.6.8 In 2023, the Scottish marine economy generated £5.6 billion in aGVA, 3% of the total Scottish economy, and employed 75,900 people, accounting for 2.9% of total Scottish employment. Marine and coastal tourism employs the most people (46%) of all the marine economic sectors whilst support for oil and gas provides the largest contribution to aGVA (43%) (Scottish Government, 2025). The contribution of the Regional Socio-Economics Study Area to Scotland's Marine aGVA is displayed in Table 18.10.

Table 18.10: Regional Socio-Economics Study Area Local Authorities Contribution to Scotland's Marine aGVA (Scottish Government, 2025)

	Aberdeen City	Aberdeenshire	Angus
Contribution to Scotland's Marine aGVA	38%	18%	1%

18.6.9 Additionally, fishing is an important marine economy sector for Scotland's coastal economies. In 2023, fishing generated £394 million aGVA, 0.21% of the Scottish economy and 7% of the marine economy aGVA (Scottish Government, 2025).

Energy Transition

18.6.10 Offshore wind energy is a growing industry in the Regional Socio-Economic Study Area. In 2025, there were 21,438 energy sector jobs in the Central Lowlands[3] region (Energy Skills Intelligence Hub, 2026).

18.6.11 Aberdeen and Aberdeenshire are continuing to strengthen their role in the offshore wind sector. The Port of Aberdeen supports over 12,500 jobs in the local and regional supply chain and generates £1.5 billion GVA. However, 65% of revenue is currently generated by oil and gas operations, compared to only 1% by renewables, meaning it's a key site for energy sector transition (UK Parliament, 2025). The Port of Peterhead, situated in Aberdeenshire, is also a key location for offshore energy development; it is the North East's leading deep seaport catering for vessels such as offshore supply vessels, subsea support vessels, and cruise liners (Aberdeenshire Council, n.d.).

18.6.12 Economically, Angus is also becoming increasingly tied to offshore wind development, with plans for significant expansion of the Port of Montrose, a major global O&M hub for offshore wind energy (Montrose Port Authority, 2025). Furthermore, in 2024, a new skills academy for renewable energy was announced to be built in Montrose, receiving £1.25 million of funding from Scottish Government's Tay Cities Industrial Investment Programme (Angus Council, 2024).

Supply chain development

18.6.13 The Applicant has signed the Collaborative Framework Charter along with 25 other ScotWind developers in which they have committed to support the growth of world class port infrastructure in Scotland that is commercially competitive and technically able to support delivery of the volume of offshore wind projects expected in Scottish waters, with particular focus on securing greater manufacturing activity around growth of floating offshore wind. Primarily this is through information sharing and coordinating the development of a sustainable pipeline to unlock investment.

18.6.14 The main output from the Collaborative Framework was the creation of the Strategic Investment Model (SIM) which was successful in identifying and prioritising the most strategically important investment opportunities for Scotland in infrastructure, manufacturing and fabrication. The SIM has shaped the priorities for the Scottish Government's £500m offshore wind investment fund which is now being directed through the Scottish Offshore Wind Energy Council (SOWEC). The Applicant is an active contributor to the work of SOWEC. The Applicant continues to drive a number of collaborative discussions/ relationships with other ScotWind interests to explore areas for convergence

[3] The Central Lowlands refers to the Midland Valley of Scotland, the country's most densely populated region extending between the Highland Boundary Fault and the Southern Uplands Fault, and encompassing major cities including Aberdeen, Glasgow, Edinburgh, Stirling, Perth and Dundee, where the majority of Scotland's population and a large proportion of its industrial base are located.

on technologies to provide a visible pipeline of opportunity to enable supply chain investment.

18.6.15 Scottish manufacturing capability at present is low or absent from many of the anticipated sectors/components required to establish a competitive offshore wind manufacturing industry in Scotland; subsequently a core focus of the Applicant has been to support the development of Scottish manufacturing capability and supply chains. The Applicant has a programme of engagement with large overseas manufacturers to explore potential for the Applicant's pipeline to act as catalyst for investment in UK production facilities.

18.6.16 The Applicant also notes the advent of Green Freeports in Scotland, annual CFD auctions, the Clean Industry Bonus, Great British Energy, the Modern Industrial Strategy (and associated funds) and the Green Industrial Strategy in Scotland (and associated funds) as key enablers to growing the Scottish and UK industry.

18.6.17 The Applicant is committed to developing the offshore wind sector's workforce and skills. The SCDS for Bowdun OWF outlines the Applicant's commitments to several measures aimed at enhancing economic impact by encouraging the performance of contracts by local suppliers. This includes engaging with local suppliers and industry groups to understand their capacity to support the construction of the Project. The Applicant is also committed to further support companies through its award-winning Supply Chain Pathways Programme which directly addresses an institutional barrier to Scottish supply chain participation in offshore wind by pre-qualifying companies with their pre-selected offshore construction Tier 1, DEME Offshore. By pre-qualifying Scottish suppliers, The Applicant will create opportunities for those businesses on the Project but also other projects which DEME will bid to deliver in the UK and more widely. This approach is unique and differentiates the Applicant from other OWF developers.

Demographics

18.6.18 This section sets out the baseline context for demographics for the Proposed Development only. The baseline for demographics for the Onshore Infrastructure is provided in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

18.6.19 Table 18.11 presents population statistics for the local authorities in the Regional Socio-Economics Study Area, comparing respective population breakdowns by age to the Scotland average.

Table 18.11: Population Demographics in Regional Socio-Economics Study Area Local Authorities (Scottish Government, 2022; Office for National Statistics, 2025; National Records of Scotland, 2025)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Total Population, 2024	265,080	231,780	114,810	5.5m
% under 16	18.5	15.7	16	19.9
% aged 16-64	60.5	67.2	58.9	60.6
% aged 65+	21.0	17.1	25.1	19.5

Population Density /km^2	41.9	1227	52.41	16.0
Net Migration Rate, 2023-2024 (per 1000 population)	4.2	11.7	5.5	10.2
Net Annual Population Increase, 2023-2024	0.2%	1.1%	0.1%	0.7%

18.6.20 Demographically, Aberdeen City has a high population density and a predominantly working-age population. Aberdeen City experienced a significant fall in net migration between 2022 and 2023 and 2023 and 2024, from 24.2 people per 1,000 to 11.7 per 1,000 people. Aberdeenshire is the sixth most populus council area in Scotland. There are a lower-than-average population of children and a higher-than-average population aged 65 and over, with a recorded population of 265,080 in 2024. In 2023 to 2024, Aberdeenshire was the council area with the second lowest net migration rate, out of all 32 council areas in Scotland. Alongside an ageing population, this has stalled the area's population growth.

18.6.21 In 2024, Angus had a recorded population of 114,810, with a lower-than-average population density and a higher-than-average proportion of those aged 65+. Population growth is very low, partly driven by falling net migration.

Housing and Local Services

18.6.22 This section sets out the baseline context for housing and local services for the Proposed Development only. The baseline for housing and local services for the Onshore Infrastructure is provided in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

Housing

18.6.23 Table 18.12 presents key housing statistics for the local authorities in comparison to Scottish averages.

Table 18.12: Housing Statistics in Regional Socio-Economics Study Area Local Authorities (Office for National Statistics, 2025; Scottish Government, 2024)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Average House Prices, 2025	£201,000	£136,000	£166,000	£193,000
Average Rental Prices, 2025	£858	£858	£821	£1018
Vacancy Rate, 2024	4.4%	6.3%	4.3%	3.3%

18.6.24 A summary of the data is as follows:

- Aberdeenshire has a slightly greater vacancy rate and lower property rental prices than Scotland overall. House prices are higher than the Scotland average.

- Aberdeen City has the second highest level of vacant housing stock across Scotland and rental prices aligned with the Scotland average. House prices are much lower than the Scotland average.
- Angus has a slightly greater vacancy rate and lower property rental prices than Scotland overall. House prices are lower than the Scotland average.

Local Services

18.6.25 The pupil–teacher ratio (PTR) is a basic education metric that shows how many pupils (students) there are for every one teacher in a school or education system. PTR for the local authorities in the Regional Socio-Economics Study Area is shown in Table 18.13. A lower PTR indicates a higher capacity within schools, and vice versa.

Table 18.13: PTR for local authorities in the Regional Socio-Economics Study Area (Scottish Government, 2024)

	Aberdeenshire	Aberdeen City	Angus	Scotland
Pupil-teacher ratio (2024)	13.8	14.1	13.0	13.3

18.6.26 Performance standards are set and agreed between the Scottish Government and National Health Service (NHS) Boards to provide assurance on NHS Scotland performance. These standards provide an indication of the level of capacity at which each health board is operating at. Key performance metrics for the NHS Boards in the Regional Socio-Economics Study Area are shown in Table 18.14. Geographies are slightly different, and the data is more aggregated, based on the areas covered by NHS Boards (i.e. Grampian includes Aberdeenshire and Aberdeen City, while Tayside includes Angus).

Table 18.14: Key performance metrics for NHS Boards in Regional Socio-Economics Study Area (Scottish Parliament, 2025)

	Grampian	Tayside	Scotland
A&E Estimate[1] (to 31/12/2025)	61.0%	82.3%	67.0%
GP 48 Hour Access Estimate[2] (to 31/03/2024)	85.7%	91.7%	89.1%
Diagnostic Waiting Times Estimate[3] (to 30/09/2025)	41.7%	59.1%	54.4%

[1]95% of people should be seen, admitted, discharged or transferred within 4 hours. NHS Boards should work towards 98.0%.
[2]GPs should provide 48-hour access to an appropriate member of the GP team for at least 90% of patients.
[3]All patients should receive key diagnostic tests/investigations within 6 weeks.

18.6.27 These performance indicators show that Tayside is meeting national standards for GP 48-hour access, while Grampian falls below the Scottish average. None of the NHS Boards are meeting the targets for accident and emergency, but Tayside performs better than Grampian in this area.

Tourism and Recreation

18.6.28 This section sets out the baseline context for tourism and recreation for the Proposed Development only. The baseline for tourism and recreation for the Onshore Infrastructure is provided in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

Tourism

18.6.29 The tourism industry in Aberdeenshire and Aberdeen City is a significant contributor to the regional economy, and in 2024, Aberdeen ranked seventh in spending by overnight visitors in UK cities, with an average spend per overnight visit of £290 in 2024, totalling £396 million (Visit Scotland, n.d.).

18.6.30 Figures from independent research conducted by Global Tourism Solutions (GTS) using the Scottish Tourism Economic Activity Monitor (STEAM) model show an upward trajectory for the region's tourism sector. Key findings were as follows (Opportunity North East, 2025):

- The economic impact of tourism in Aberdeen City and Aberdeenshire increased year-on-year to £1.27 billion in 2024, a growth of 2% over 2023.
- The region attracted almost 3.7 million staying visitors in 2024, up 16.9% on 2023.
- The region welcomed over 2.59-million-day visitors, up 2.8% from 2023.
- Tourism directly employed 11,400 full-time equivalent jobs in 2024 across Aberdeen City and Aberdeenshire, an increase of 1.5% on 2023.

18.6.31 Visit Scotland survey data can be used to observe patterns of demand across accommodation types. Although different geographic areas are used, Aberdeen and Grampian is considered broadly representative of the Tourism and Recreation Study Area. The data, shown in Table 18.15, reveals a decline in non-serviced accommodation occupancy between 2023 and 2024 alongside a small rise in hotel room occupancy.

Table 18.15 Tourism Accommodation Capacity – Angus, Aberdeen and Grampian (Visit Scotland, 2024)

	Angus & City of Dundee				Aberdeen & Grampian			
	2024	2023	24/23 Diff	Change	2024	2023	24/23 Diff[4]	Change[5]
Hotels % Room Occupancy	65.74%	65.90%	-0.16	100	69.90%	69.01%	+0.89	101
Guest House, B&B% Room Occupancy	14.83%	13.24%	+1.24	101	61.35%	66.76%	-5.41	95

[4] 2024/2023 Diff is expressed by % Point Change.
[5] Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Self-Catering Accommodation % Unit Occupancy	54.12%	56.87%	-2.75	97	24.90%	36.53%	-11.63	88

Recreation

18.6.32 Recreational sailing, boating and motor cruising is an important characteristic of coastal areas in Scotland. In a 2015 survey of 279 marine recreation and tourism businesses, general recreation, sailing and other forms of boating was reported as the second largest category that the businesses serve (Marine Directorate, 2015). Sailing alone is worth over £100 million to Scotland's economy each year (The James Hutton Institute, n.d.).

18.6.33 In Aberdeen City and Aberdeenshire, coastal assets, such as Aberdeen Beach and Balmedie Beach, are crucial for supporting local sailing and small vessel marine recreation (The James Hutton Institute, n.d.). Classic Sailing identifies May as a particularly favourable month for sailing in Scotland due to extended daylight hours and mild weather conditions. Tourism activity subsequently peaks between June and August, which corresponds with the period of highest recreational sailing demand and overall marine-based visitor activity (Classic Sailing, 2026). Additional information related to recreational sailing, boating, motor cruising and other marine recreational activities is presented in Volume 2, Chapter 16: Infrastructure and Other Users and information regarding small vessel activity is available in Volume 2, Chapter 14: Shipping and Navigation.

Tourism and Recreation Receptors

18.6.34 Tourism and recreation receptors have been identified from Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts and Volume 2, Chapter 21: Cultural Heritage are presented in Table 18.16 and are shown in Figure 18.2.

18.6.35 The majority of receptors identified are located within 100 m of viewpoints in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts (SLVIA). Tourism receptors with the potential to experience environmental effects from the Proposed Development are shown in Table 18.16 and Table 18.17.

Table 18.16: Tourism and Recreation Receptors

Receptor	Description	Location	SLVIA Viewpoint	Cultural Heritage Receptor
Buchan Ness Lighthouse	Lighthouse	Peterhead AB42 3NF	Viewpoint 1	✓
Slain's Castle	Castle	A975, Cruden Bay, Peterhead AB42 0NE	Viewpoint 2	✓
Cruden Bay	Bay	Peterhead	Viewpoint 3	x
Collieston	Village	11 Whiteness Cottages, Hightown, Collieston, Ellon AB41 8RS	Viewpoint 5	x

Receptor	Description	Location	SLVIA Viewpoint	Cultural Heritage Receptor
Seal Beach	Beach	Newburgh, Ellon AB41 6BY	Viewpoint 6	x
Balmedie Beach	Beach	Aberdeen, AB23 8WU	Viewpoint 7	x
Aberdeen/Orkney Ferry Link	Ferry Link	N/A	Viewpoint 8	x
Royal Aberdeen Golf Course	Golf Course	Links Rd, Bridge of Don, Aberdeen AB23 8AT	Viewpoint 9a	x
Aberdeen Esplanade/Beach	Historical Landmark	Aberdeen AB24 5RZ	Viewpoint 10	x
Torry Battery	Historical Landmark	Greyhope Rd, Torry, Aberdeen AB11 8QX	Viewpoint 11	✓
Baron's Cairn	Nature Reserve	Torry, Aberdeen AB12 3HX	Viewpoint 13	x
Girdle Ness Lighthouse	Lighthouse	1-5 Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX	Viewpoint 12	✓
Stonehaven Harbour and Pier	Harbour	Old Pier, Stonehaven AB39 2JU	Viewpoint 17	x
Stonehaven War Memorial	War Memorial	1, Stonehaven AB39 2TJ	Viewpoint 18	x
Dunnottar Castle	Ruined Fortress	Stonehaven, AB39 2TL	N/A – not included in SLVIA assessment	✓

Table 18.17: Tourism Receptors - Coastal Paths

Receptor	Description	Location	Distance from SLVIA Viewpoint
Coastal Path Boddam to Cruden Bay	Coastal Path	A975, Cruden Bay, Peterhead AB42 0NE	0 m from Viewpoint 2
Coastal Path Whinnyfold North Section	Coastal Path	Whinnyfold	4 m from Viewpoint 4
Coastal Path Collieston Village	Coastal Path	Collieston	8 m from Viewpoint 5
Coastal Path Newburgh Aberdeen City Boundary	Coastal Path	Newburgh, Ellon AB41 6BY. Aberdeen, AB23 8WU	0 m to Viewpoint 6 and Viewpoint 7
Murcar Beach Path	Coastal Path	Bridge of Don, Aberdeen AB23 8DS	16 m to Viewpoint 9
Coastal Path Muchalls Village - Road Link	Coastal Path	Muchalls	55 m to Viewpoint 15
Coastal Path Gourdon to Inverbervie	Coastal Path	Inverbervie	9 m to Viewpoint 19

18.6.36 Tourism accommodation receptors that have the potential to be impacted by the Proposed Development have been identified using the viewpoints assessed in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts. Table 18.18 includes tourism accommodation within 100 m of the viewpoints identified within the Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts.

Table 18.18: Tourism Accommodation

Facility	Description	Location	Distance from SLVIA Viewpoint
Buchanness Lighthouse Holidays	Self-catering Accommodation	Bridge St, Boddam, Peterhead AB42 3NF	90 m from Viewpoint 1
Lighthouse Cottage	Self-catering Accommodation	Greyhope Cottage Girdleness, Greyhope Rd, Torry, Aberdeen AB11 8QX	40 m from Viewpoint 12
Northern Lights Apartments	Self-catering Accommodation	Girdleness Lighthouse Cottage, Torry, Aberdeen AB11 8QX	55 m from Viewpoint 12

Socio-Cultural Values

18.6.37 This section sets out the baseline context for socio-cultural values for the Proposed Development only. The baseline for socio-cultural values for the Onshore Infrastructure is provided in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

Overview

18.6.38 Socio-cultural values are the beliefs, values, traditions and habits that influence our everyday behaviour. Within communities, shared socio-cultural values can provide a sense of unity and belonging, in addition to supporting the development of social capital. Social capital refers to "the social connections that contribute to people's quality of life, health, safety, economy and wellbeing in the neighbourhoods where they live" (Scottish Government, 2020).

18.6.39 Scottish Index of Multiple Deprivation (SIMD) measures deprivation in terms of domains such as income, health, and access to services and can be an indicator of social capital within a community. An analysis of data from the Understanding Society Survey (What Works Wellbeing, 2019) summarises research showing that local area deprivation and social fragmentation strongly influence individual wellbeing, independent of personal circumstances. Residents in the most deprived neighbourhoods experience lower wellbeing, weaker social cohesion, and reduced neighbourhood attachment (What Works Wellbeing, 2019).

18.6.40 The socio-economic deprivation profile for the Regional Socio-Economics Study Area is shown on Figure 18.3. A summary of key data related to SIMD for the local authorities in the Regional Socio-Economics Study Area is presented in Table 18.19.

Table 18.19: SIMD Deprivation – Local Authorities in Regional Socio-Economics Study Area (Datamap Scotland, 2025; Community Planning Aberdeen, 2023; Aberdeenshire Health and Social Care Partnership, 2024; Scottish Government, 2016)

	Aberdeen City	Aberdeenshire	Angus
Overall Level of Deprivation	Mid-range levels of deprivation.	Lowest levels of deprivation.	Mid-range levels of deprivation.
Evidence	103,585 residents (45.3%) were living in the three least deprived zones (deciles 8 to 10), and 47,146 residents (20.6%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles 1 to 3).	137,117 residents (52.4%) were living in the three least deprived zones (deciles 8 to 10) and only 13,640 residents (5.2%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles 1 to 3).	20,837 residents (17.9%) are living in areas corresponding to the three most deprived deciles in Scotland (deciles 1 to 3) and 30,694 residents (26.4%) were living in the three least deprived deciles (deciles 8 to 10).
Key Drivers of Deprivation	Poor housing and high crime rates.	Poor access to services.	Pockets of deprivation are more prominent in urban areas and deprivation in terms of access is the worst performing domain.
Change Since 2016	The proportion of datazones in the 40% most deprived areas of Scotland increased from 28% to 33.2%, suggesting a slight increase in deprivation.	The number of datazones in the 20% least deprived areas in Scotland fell by 6.3%, suggesting a slight increase in deprivation.	The proportion of datazones in the 40% most deprived areas in Scotland rose from 15% to 19%; the proportion in the 20% most deprived areas remained unchanged. Small rise in deprivation.

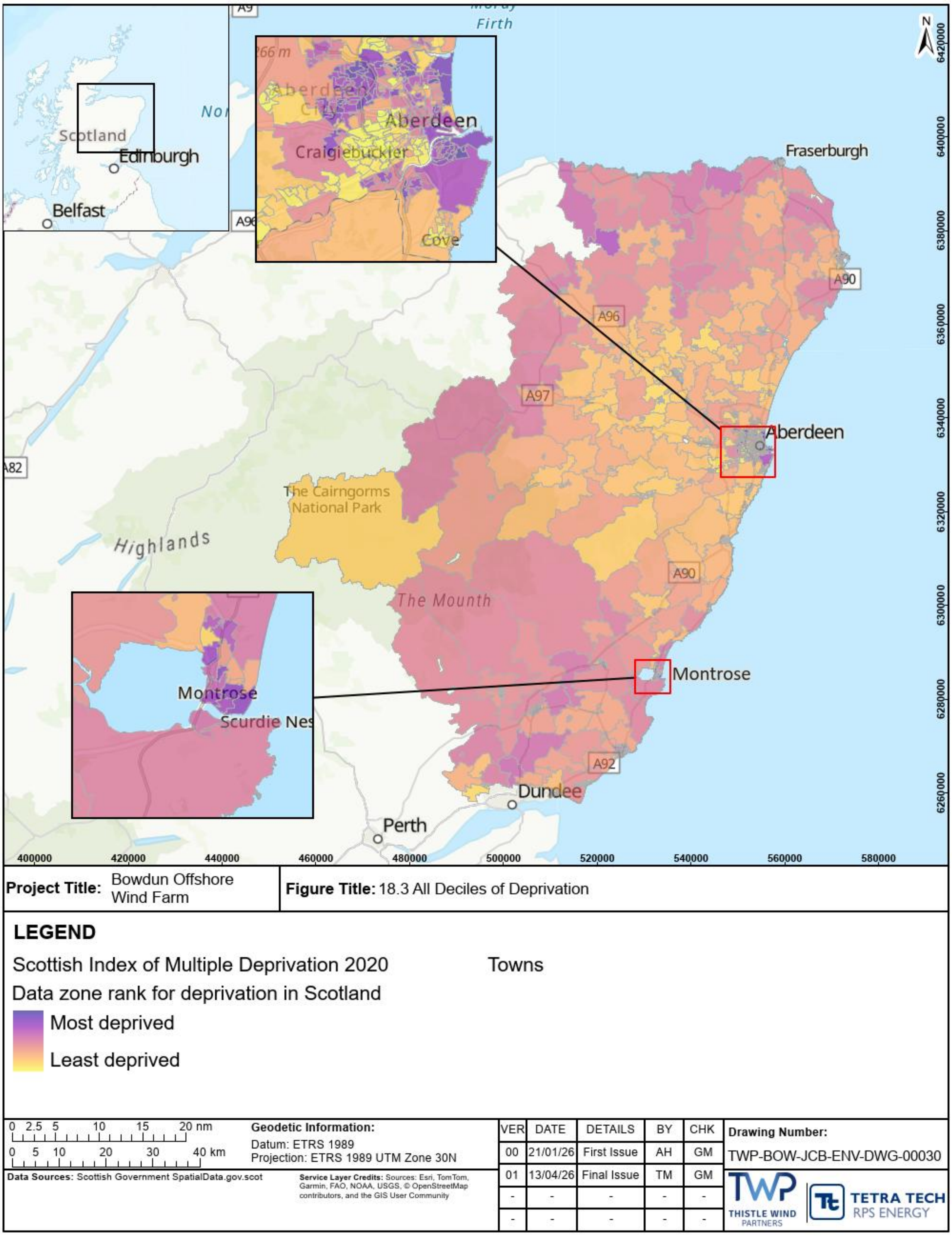

Figure 18.3: All Deciles of Deprivation

18.6.41 The decline of the oil and gas industry has increased economic challenges for the North East's coastal communities, including increasing inequality and deskilling of labour, leading to higher levels of out-migration compared to other parts of Scotland (Just Transition Commission, 2025; Scottish Government, 2020). Climate also poses a threat the region, with increasing erosion of coastal infrastructure, which are core to the region's economy, way of life and social identity (Aberdeenshire Council, 2025; Community Planning Aberdeen, 2023). Similarly, in Angus, where nearly two thirds of the population live near or on the coast, increasing flooding and erosion mean communities are facing financial, emotional and physical distress (Angus Council, 2016).

Community Empowerment

18.6.42 The Applicant has undertaken a series of community events in Aberdeenshire to introduce the Project to local people. These events aim to provide information, gather feedback from community and increase engagement with local stakeholders. These events were followed by formal Pre-Application Consultation (PAC) events undertaken in August and October 2025 and January 2026. These events seek to empower the local communities by promoting transparency and considering local needs and priorities into the planning process. Full details of community engagement undertaken is provided in the PAC report and in Volume 1, Chapter 4: Stakeholder Engagement and Consultation.

18.6.43 As noted in the Onshore BOWFL Planning Statement (BOWFL, 2025), provision of a community benefit fund and/or shared ownership which may be linked to operational performance of the wind farm is actively being considered for the Project. However, policy and requirements for community benefit for offshore wind farms are under review both by Scottish Government, but also at the UK Department for Energy Security & Net Zero; the latter is considering introduction of mandatory community benefit and how best to facilitate shared ownership. Given this policy uncertainty, as well as provision of Community Benefit not being a material consideration, further details on community benefit and shared ownership would be agreed post consent. The Project will meet the legislative requirements and consider updates to any guidance that emerges post consent. The Applicant looks to support community empowerment and have a positive impact on the local communities its projects are within. Further details relating to community benefit are provided in the Bowdun Planning Statement (BOWFL, 2025) accompanying the planning submission for the Bowdun OWF Onshore Infrastructure.

STEM Initiatives

18.6.44 The Applicant recognise the importance of ensuring the future workforce has the capacity to ensure the growth of the renewables sector; the Offshore Wind industry is forecast to employ approximately 104,000 employees in the UK by 2045, comprising 45% of all energy sector jobs (Offshore Wind Industry Council, 2023).

18.6.45 The Applicant has undertaken various STEM outreach activities in Aberdeenshire since 2024, including YESC Celebration Day, TechFest Activity Weekend, STEMOVATORS, TechFest Aberdeen Science Festival, and Aberdeen Science Centre Workshops with regional primary schools. These events are run as workshops with the aim of encouraging young people in the region to engage with the Project and learn about offshore wind. Participants learn how turbines work, where they are located, substation information and environmental aspects. Over 3,500 children have taken part in these events to date.

18.6.46 Additionally, a Developing the Young Workforce North East workshop was held at Mearns Academy in Laurencekirk as part of a STEM Careers Fair. This event provided the community and project region schools with information on potential STEM and offshore wind prospective jobs, encouraging young people to consider a career in the sector. More recently, the Applicant undertook mock interviews at Mearns Academy and Aberdeen Grammer, developing interview and communication skills with young people aged 15-16 years old.

Future Baseline Scenario

18.6.47 The EIA Regulations require that "*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 project 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*" is included in the EIA Report.

18.6.48 Accordingly, the 'without development' future baseline conditions are described in this section.

GVA and Employment

18.6.49 Skills Development Scotland has created reports highlighting GVA and workforce trends for regions in Scotland, presented in Table 18.20. Although the geographies are slightly different and the data is more aggregated, for instance Tayside is used as opposed to Angus, this data is useful for determining future economic trends.

Table 18.20: GVA and Workforce Projections (Skills Development Scotland, 2025)

	Aberdeen City and Aberdeenshire	Tayside	Scotland
GVA Growth, 2025-2028	1.4%	1.5%	1.7%
GVA Growth, 2028-2035	1.2%	1.5%	1.6%
Productivity Growth, 2025-2028	1.1%	0.9%	0.8%
Productivity Growth, 2028-2035	1.1%	1.2%	1.0%
Workforce Growth, 2025-2028	0.8%	1.8%	2.5%
Workforce Growth, 2028-2035	0.7%	2.3%	4.0%

18.6.50 For the years 2028 to 2035, all areas have a lower projected GVA growth than Scotland overall; however, productivity growth is expected to be higher. Workforce growth is much lower in all three areas than the Scotland average, with Aberdeen City and Aberdeenshire having the lowest at 0.7%. This suggests that most economic growth in these areas is being driven by productivity improvements, not by adding workers or expanding employment. The implication is that the future competitiveness of the region will rely heavily on innovation, skills, and capital investment rather than population or workforce expansion.

18.6.51 Future projections highlight further decline in the oil and gas industry, with the number of jobs in the Scottish 'Central Lowlands' region predicted to figure is likely to fall to 40% (of all energy sector jobs) by 2030 (Energy Skills Intelligence Hub, 2026). Some estimates indicate that around 14,000 people in the region will need to have moved to other roles or sectors between 2022 and 2030 (Just Transition Commission, 2025). This indicates that a significant portion of the workforce will require reskilling to transition into other industries.

18.6.52 Offshore wind (both fixed and floating) employment in the UK is projected to increase from 24% (2024) to 45% in 2030. This mirrors the employment growth of other renewables such as CCUS, which is projected to increase from 1.7% (2024) to 7.3% in 2030 (Energy Skills Intelligence Hub, 2026).

Population and Demographic Changes

18.6.53 Scotland's population is projected to increase by 6.2% between mid-2022 and mid-2047 to a population of 5.8 million. This trend is supported by predicted increases in positive net migration, despite falling birth rates and a lack of 'natural growth' in the population (National Records of Scotland, 2025). Projections for each Local Authority compared to national averages in available below in Table 18.21.

Table 18.21: Population Projections (National Record of Scotland, 2025)

	Aberdeen City	Aberdeenshire	Angus	Scotland
Population Growth, 2022-2032	4.8%	1.2%	0.4%	4.4%
Age Group - Largest Population Growth	75+ age Group – +25.5%	75+ age Group – +39.7%	75+ age Group – +26.5%	75+ age Group

18.6.54 All local authorities in the Regional Socio-Economics Study Area follow the national trend towards an aging population, with Aberdeenshire having the greatest projected proportional increase in the 75+ age group up to 2032. Aberdeen City is projected to have the highest level of population growth from 2022-2032, while Aberdeenshire and Angus have growth rates far below the Scotland average.

Housing and Local Services

18.6.55 Key trends in relation to housing and local services within the Regional Socio-Economics Study Area have been identified from a review of local policy documents, and are summarised as follows:

- Aberdeen City and Aberdeenshire's Strategic Housing Investment Plans (SHIP) 2026–2030 could deliver 2,291 affordable homes, subject to funding. Housing targets for 2020–2032 total 28,600 homes (10,010 affordable; 18,590 market), with 18,720 homes planned for 2033–2040.

- Regeneration priorities outlined in the Local Development Plan for Aberdeenshire include Peterhead, supporting energy transition, community facilities, improved transport, and new housing, including 1,265 homes at Inverurie Meadows.
- As outlined in the Local Housing Strategy for 2023 to 2028 for Angus, there is an estimated need for 220 new homes a year until 2033. Place-based regeneration is a key focus for the council, creating accessible services which support age and health related needs and promote equal access and opportunities (Angus Council, 2023).

Tourism

18.6.56 Visit Aberdeenshire produced 'Destination Aberdeen & Aberdeenshire: A Framework for Growth 2022-2030', which sets the ambition for Aberdeen City and Aberdeenshire to become Scotland's leading visitor destination by 2030 (VisitAberdeenshire, 2021). The strategy notes the trend of uncertainty in relation to global and national events (e.g. Covid-19 pandemic) and how visitor choices and behaviour respond to these in terms of changes to destination choice and activities. It is surmised that some changes may last but overall, fundamental motivations will remain the same. Additionally, a trend towards visitors enjoying adventures in the outdoors is noted as being of continued importance in the future, though concerns are highlighted in regard to overcrowding.

Socio-cultural Impacts

18.6.57 Future projections suggest a worsening of inequalities in Aberdeenshire, due to gaps in educational attainment (Aberdeenshire Council, 2024), rising levels of child poverty, increasing numbers of households with children and an adult affected by a disability or limiting long-term health condition, and a continued shortage of affordable or suitable housing (Aberdeenshire Council, 2024). In Aberdeen City, the link between income deprivation and poorer health is becoming more prevalent, with projections suggesting a decline in healthy life expectancy, where those born between 2019 and 2021 can expect to live about a fifth of their lives in poor health (Community Planning Aberdeen, 2023).

18.6.58 In the future, there is likely to be further socio-cultural implications for coastal communities in the Regional Socio-Economics Study Area. Without support for new jobs within the renewable sector, the worsening economic outlook for the region (EY UK, 2025) is likely to further the high-levels of out-migration in the area and maintain the high levels of deprivation in coastal settlements. However, across the Regional Socio-Economics Study Area Local Authorities, this is seen as an opportunity for strategic growth, with plans for job creation, infrastructure investment and improved service access in key coastal settlements (Community Planning Aberdeen, 2023; Aberdeenshire Council, 2025).

18.6.59 As employment within skilled, high-value oil and gas sectors continues to decline and the regional economy undergoes structural transition and diversification, there is potential for differential socio-economic impacts across population groups in the absence of effective mitigation or targeted intervention (Institute for Fiscal Studies, 2023). However, over the Proposed Development lifespan of up to 30 years, the future baseline of the socio-cultural environment cannot be defined with confidence. This is due to uncertainties associated with demographic change, labour market restructuring, policy and regulatory responses, and economic, technological and behavioural changes, all of which may influence future socio-economic conditions.

Data Limitations and Assumptions

GVA and employment

18.6.60 For the quantitative assessment of impacts on GVA, employment, and the supply chain, assumptions have been made about the activities and industries associated with each expenditure category, and by extension, each phase of the Proposed Development. Two scenarios were modelled to reflect a higher or lower proportion of total expenditure being met by the local and UK supply chain.

18.6.61 The calculation of local economic impacts assumes that 35% Scottish supply chain spend will be with suppliers in the Regional Socio-Economics Study Area for Scenario 1 (Commitments Scenario), and 50% spent with Regional Socio-Economics Study Area suppliers in Scenario 2 (Ambitions Scenario). This is a conservative assumption based on analysis undertaken by the Applicant for the onshore capital works which indicates that 68% of expenditure could be accommodated by the supply chain in Aberdeenshire and Angus.

18.6.62 Full details of assumptions for the GVA and employment assessment are detailed in Volume 3, Technical Appendix 18.2: Socio-Economics Quantitative Assessment Methodology.

Wider socio-economic impacts

18.6.63 The socio-economics, tourism and recreation assessment is informed by other environmental topic chapters: Volume 2, Chapter 13: Commercial Fisheries; Volume 2, Chapter 14: Shipping and Navigation; Volume 2, Chapter 16: Infrastructure and Other Users; Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts and Volume 2 Chapter 21: Cultural Heritage. Thus, any assumptions and limitations for those assessments also apply to the socio-economics, tourism and recreation assessment.

18.6.64 Availability of recent data was a limitation in collecting baseline information for some socio-economic topics. Up-to-date data varies across local authorities, particularly for local service capacity and socio-cultural values. Aberdeenshire and Aberdeen City have more up-to-date datasets, while Angus Council data can be up to ten years old. As datasets are produced by different organisations on varying cycles, such gaps are typical for this type of baseline analysis.

18.6.65 The assessment undertaken of impacts related to demographics, housing and local services, and socio-cultural effects related to potential port locations has been necessarily high-level, with consideration of the local authority areas most likely to be impacted. The location of the ports has not yet been confirmed and as a result, no primary data collection has been undertaken in relation to communities impacted by port activity for the Proposed Development. A report by BiGGAR Economics in 2025, commissioned on behalf of the SOWEC for the Crown Estate Scotland, set out the drawbacks in collecting data and consulting at an individual project level and recommended the development of sector-wide datasets that can be used by multiple OWF developers in Scotland. This would allow identification of where geographically concentrated impacts could occur, where adverse impacts may need to be mitigated, and where opportunities exist to enhance benefits. The cumulative effects assessment within this chapter presents an indication of some of these overlapping and potentially compounding impacts, however, sector-wide collaboration is required. In recognition of this, the SOWEC and Crown Estate Scotland (CES) have been investigating potential social impacts on communities around ports and other impact epicentres likely to be used for construction and operation for the pipeline of offshore wind projects underway in Scotland. The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations.

18.6.66 No site-specific surveys were carried out for the socio-economics, tourism and recreation assessment, as they were not considered necessary at this stage of the Proposed Development. However, key receptors identified in related environmental chapters were confirmed during site visits for those topics, and together with desk-based information, this has informed the assessment of potential impacts. The same approach was followed for the assessment of the onshore infrastructure (BOWFL, 2024).

18.7 Key Parameters for Assessment

Maximum Design Scenario

18.7.1 The Maximum Design Scenario (MDS) identified in Table 18.22 are those parameters expected to have the potential to result in the greatest effect on an identified receptor or receptor group. Any other development scenario in the Project Design Envelope (PDE), will result in an equal to, or lower, level of environmental effect. The scenario has been selected from the details provided in Volume 1, Chapter 3: Project Description.

Table 18.22: Maximum Design Scenario Considered for Each Potential Impact as Part of the Assessment of Likely Significant Environmental Effects on Socio-Economics, Tourism and Recreation

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
Impact on employment, GVA and supply chain	✓	✓	✓	**All phases** The socio-economic assessment of impacts on GVA and employment is modelled based on the expected level of Project expenditure. Detailed expenditure based on the Proposed Development infrastructure and design is not available at this stage. However, the SCDS contains expenditure estimates for construction and O&M. Total expenditure was estimated based on a typical OWF of this size, with two scenarios for the proportion of total expenditure in the Scottish and UK supply chain - the Commitments scenario and the Ambitions scenario. For the Construction and O&M phases, the MDS of the employment and GVA impacts are derived directly from the SCDS Commitments scenario construction and O&M stage expenditure in the Scottish and UK supply chain. For the decommissioning phase, the MDS of the employment and GVA impacts are derived from an assumption for total decommissioning expenditure based on the Guide to an Offshore Wind Farm (BVG Associates, 2025), with the assumed proportion of Scottish and UK supply chain expenditure based on that of the SCDS Commitments scenario construction stage expenditure, since the scale and type of effects during the decommissioning stage could be expected to be similar to those anticipated to occur during the construction stage.	The Commitments scenario assumes a lower proportion of total expenditure in the Scottish and UK supply chain than the Ambitions scenario, therefore the Commitments scenario represents the worst-case scenario for GVA and employment benefits.
Demographic Changes	✓	✓	✓	**All phases** The MDS for demographic changes across all phases of the Proposed Development are defined using a similar approach. The employment supported during the construction, O&M, and decommissioning of the Proposed Development may attract permanent or transient workers to the Regional Socio-Economics Study Area. Therefore, the MDS for demographic changes represents the maximum number of workers which will need to be employed within Scotland, assuming that none can be sourced locally. This provides a worst-case scenario for a long-term increase in the local population, as people move to the area for job opportunities and to fill skilled and technical roles.	The employment supported during the construction, O&M, and decommissioning of the Proposed Development may attract permanent or transient workers to port locations. As port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
				Most of these impacts are expected to occur at the port locations for the Proposed Development, which are unknown at the time of writing, but are expected to be located within the Regional Socio-Economics Study Area. The demographic assessment has been based on the estimated employment impacts under the SCDS Commitment scenario. The MDS also considers that the workforce would relocate with their families, resulting in greater increase in population.	were used in the assessment. A 'rural' port location is considered to represent the MDS as it is likely to be of higher sensitivity. The MDS for demographics also considers the potential change in demographics in relation to the employment generated under the Commitment scenario and assumes that the workforce would not be able to be sourced locally.
Changes to demand for housing and local services	✓	✓	✓	**All phases** The MDS applied to assess changes in demand for housing and other local services across all phases of the Proposed Development are formulated using approaches that are consistent with, and comparable to, one another. Any demographic changes occurring because of the Proposed Development may cause changes to housing market demand and demand for local services. Thus, the impact on changes to demand for housing and local services draws on the MDS assumptions for demographic changes across the three phases. As port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario were used in the assessment.	Any demographic changes because of increased employment during the construction, O&M and decommissioning of the Proposed Development may cause changes to demand for housing local services. As port locations have not yet been confirmed, a 'rural' and 'urban' modelled scenario were used in the assessment. A 'rural' port location is considered to represent the MDS as it is likely to be of higher sensitivity.

Potential Impact	Phase			Maximum Design Scenario (Worst Case Scenario)	Justification
	C	O&M	D		
Changes to tourism and recreation receptors	✓	✓	✓	**All phases** Tourism and recreation impacts are determined by significant environmental effects identified in the following chapters: - Volume 2, Chapter 13: Commercial Fisheries; and - Volume 2, Chapter 14: Shipping and Navigation; - Volume 2: Chapter 16: Infrastructure and Other Users - Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts; and - Volume 2, Chapter 21: Cultural Heritage. The MDS for these chapters have been applied to the assessment. Refer to the chapters above for additional details on topic specific MDS.	The construction, O&M and decommissioning of the Proposed Development has the potential to influence enjoyment of tourism and recreation assets and affect visitor behaviour, depending on the other environmental impacts that are generated. As impacts on tourism and recreation are indirect, the MDS for these relevant environmental topics have been applied to the assessment.
Socio-cultural Impacts	✓	✓	×	**Construction, O&M and Decommissioning phases** The Proposed Development may lead to socio-cultural effects arising from increased activity at port(s) and around Landfall. Under a worst-case scenario, the workforce required for the Proposed Development could result in pronounced short-term demographic change, heightened demand for housing and local services, and shifts in community character and wellbeing. Given the scale and duration of activity at both construction and O&M and Decommissioning ports, socio-cultural effects could extend across coastal communities within the Regional Socio-Economics Study Area, with potential implications for quality of life, sense of place, and overall community resilience.	As port locations are not yet confirmed, a modelled scenario for both an 'urban' and 'rural' port location has been assessed, with the 'rural' location considered to represent the MDS as it would be more sensitive to change.

Impacts Scoped Out of the Assessment

18.7.2 On the basis of the baseline environment and the project description outlined in Volume 1, Chapter 3: Project Description, some impacts were proposed to be scoped out of the assessment for socio-economics, tourism and recreation as per the Scoping Report (BOWFL, 2024).

18.7.3 Transboundary effects were scoped out of all three phases. The transboundary socio-economic effects will be located in countries out with the UK that are involved in the supply chain. At the time of the Offshore EIA Report submission, these countries are unknown and therefore it will not be possible to reliably model these impacts. This approach was confirmed with stakeholders through scoping and receipt of Scoping Opinion.

18.7.4 Socio-cultural effects during decommissioning were initially scoped out due to a likely lack of clarity on decommissioning activities and because the socio-cultural baseline is unlikely to still be applicable at the decommissioning phase. However, the Scoping Opinion received from MS-LOT and MAU requested that this phase be scoped in. Socio-cultural effects during decommissioning have therefore been assessed by utilising assumptions in relation to the future baseline scenario.

18.8 Methodology for Assessment of Effects

Overview

18.8.1 The socio-economic, recreation and tourism assessment of effects has followed the methodology set out in Volume 1, Chapter 4: EIA Methodology. Specific to the assessment, the following guidance documents have also been considered:

- HM Treasury (2022) Green Book;
- Defining 'local areas' for assessing the economic impact of offshore renewables and other marine developments: guidance principles (Marine Scotland, 2022);
- General Advice for Offshore Socio-Economic Impact Assessment (SEIA), Marine Analytical Unit (MAU) (Marine Analytical Unit, 2023);
- Guidance on assessing the socio-economic impacts of offshore wind farms (OWFs) (Glasson et al, 2020); and
- Guide to an Offshore Wind Farm Update 2025 (BVG Associates, 2025).

18.8.2 Socio-economic, tourism and recreation assessments recently undertaken for other offshore wind developments in Scotland have also been considered where relevant, for alignment with industry best practice.

18.8.3 The following sections describe the criteria used for evaluating the socio-economic, recreation and tourism effects. Some variations from this criteria are outlined within the 'Assessment approach for Socio-Economic, Tourism and Recreation subtopics' section, in paragraphs 18.8.19 to 18.8.54.

Criteria for Assessment

18.8.4 This section describes the criteria used for determining the magnitude of the potential impacts and the sensitivity of the receptors, which is used to determine the overall significance of effects. The terms used to define magnitude and sensitivity are described in further detail in Volume 1, Chapter 4: EIA Methodology.

18.8.5 The magnitude section of each impact assessment describes the spatial extent, duration, frequency and reversibility of impact (e.g. a duration of hours or days would be considered for most receptors to be of short-term duration, which is likely to result in a low magnitude of impact).

Identification of receptors

18.8.6 A 'receptor' refers to the population group or entity experiencing the impact. The various receptors considered in the assessment for each sub-topic are shown in Table 18.23.

Table 18.23 Socio-economic Receptors by Sub-topic

Subtopic	Receptor
GVA, employment, and supply chain	Regional, national, UK-wide economy
	Regional, national, UK-wide labour market
Changes to demographics	Regional communities
Changes in demand for housing and local services	Accommodation stock/local services
Changes to tourism and recreation receptors	Tourism and recreation receptors
	Regional tourism economy
Socio-cultural impacts	Regional and local communities

Magnitude of change

18.8.7 The magnitude of change represents the scale of the change from the baseline condition. It is described as Negligible, Low, Medium or High in accordance with the generic criteria set out in Volume 1, Chapter 4: EIA Methodology.

18.8.8 There is no guidance or set criteria for assessing the magnitude of change for offshore wind developments for the socio-economic, tourism and recreation sub-topics.

18.8.9 For the quantitative assessment of impacts on GVA and employment, the assumed criteria for determining the magnitude of change is shown in Table 18.29. For demographic impacts the assumed criteria for determining the magnitude of changes is shown in Table 18.30.

18.8.11 For the other socio-economic, tourism and recreation sub-topics, the impacts are qualitative, and it is not possible to apply specific quantitative criteria to determine the magnitude. The magnitude rating was assigned based on qualitative assessment and professional judgement. As such, the assessment presented in this chapter differs slightly from other EIA topic assessments for which more established guidance is available.

Sensitivity of receptor

18.8.12 Table 18.24 outlines the criteria for defining the sensitivity of receptors, in relation to factors such as performance; capacity to withstand change; and level of policy priority. Sensitivity criteria from Glasson *et al.* (2020), utilised in multiple OWF socio-economic, tourism and recreation assessments, has been adapted for the purposes of this assessment; an additional category of 'very high' sensitivity has been included in alignment with the matrix shown in Table 18.25.

18.8.13 For changes to amenity, sensitivity is assigned to individual receptors where significant residual impacts are identified from the relevant EIA chapters. This considers whether receptors are used by vulnerable members of the community, or whether the nature of the business is particular sensitive to environmental changes.

Table 18.24 Definition of Terms Relating to the Sensitivity of the Receptor

Sensitivity	
	or national policies. There is strong evidence that this receptor or subtopic faces severe socio-economic challenges, persistent underperformance, or exceptional vulnerability within the study area.
	policies. There is evidence that this receptor or subtopic faces major socio-economic challenges or underperforms, or there is vulnerability in the study area.
	policies. There is evidence of considerable socio-economic challenge or underperformance and vulnerability for this receptor or subtopic.
	policies. There is evidence that this receptor or subtopic is resilient, and there are no identified weaknesses or challenges in the study area.
	policies. There is evidence that this receptor or subtopic currently performs well, with no weaknesses or challenges in the study area.

Significance

18.8.14 The significance of change is determined based on the magnitude of the impact and the sensitivity of the receptor, as presented in Table 18.25 and Table 18.26.

18.8.15 The EIA Regulations require the identification and reporting of significant environmental effects. Table 18.25 shows how the significance of effect is determined as Negligible, Minor, Moderate or Major, based on the sensitivity of receptor and magnitude of change. In terms of the EIA Regulations, Minor and Negligible effects will be considered ‘not significant’; and Moderate or Major effects are considered ‘significant’. Table 18.26 provides the definition for each significance level.

18.8.16 Where a range is suggested for the significance of effect, for example, ‘Minor’ to ‘Moderate’, the ranking will be determined based on professional judgement and consideration of factors such as data certainty or wider environmental context, and these assumptions will be explained in the assessment. In addition, it is recognised that identified effects may be adverse or beneficial. Adverse effects refer to changes that result in a deterioration of environmental conditions or increased pressure on receptors, whereas beneficial effects denote improvements in environmental conditions or reduced pressure on receptors. The assessment of significance applies equally to both types of effects. The nature of each effect, whether adverse or beneficial, will be stated in the assessment alongside its significance level.

Table 18.25 Matrix Used for the Assessment of the Significance of the Effect

Sensitivity of Receptor	Magnitude of Impact			
	Negligible	Low	Medium	High
Negligible	Negligible	Negligible or Minor	Negligible or Minor	Minor
Low	Negligible or Minor	Negligible or Minor	Minor	Minor or Moderate
Medium	Negligible or Minor	Minor	Moderate	Moderate or Major
High	Minor	Minor or Moderate	Moderate or Major	Major
Very High	Minor	Moderate or Major	Major	Major

Table 18.26 Definition of Significance

Impact	Justification
Negligible	No effects or those that are beneath levels of perception, within normal bounds of variation, or within the margin of forecasting error.
Minor	These beneficial or adverse effects are generally, but not exclusively, raised as local factors. They are unlikely to be critical in the decision-making process but are important in enhancing the subsequent design of the Proposed Development.
Moderate	These beneficial or adverse effects have the potential to be important and may influence the decision-making process. The cumulative effects of such factors may influence decision-making if they lead to an increase in the overall adverse or beneficial effect on a particular resource or receptor.
Major	These beneficial or adverse effects are very important and are likely to be material in the decision-making process. These effects are generally, but not exclusively, associated with sites or features of international, national, or regional importance. However, a major change in a site or feature of local importance may also enter this category.

Assessment Approach for Socio-Economic, Tourism and Recreation Sub-Topics

18.8.17 For all socio-economic, tourism and recreation sub-topics apart from GVA and employment, the assessment approach is applied to the Proposed Development only. The assessment of effects arising from the Onshore Infrastructure is presented in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

18.8.18 A combined assessment of effects arising from onshore and offshore infrastructure is provided in Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore).

Impact on GVA and Employment

18.8.19 This section summarises the methodology and key assumptions for the assessment of potential impacts on GVA and employment, with the full methodology and assumptions provided in Volume 2, Technical Appendix 18.2: Socio-Economic Impact Quantitative Assessment Methodology.

18.8.20 The GVA and employment impacts will be quantified for the Project including both the onshore and offshore elements. This is the same approach followed in the Bowdun OWF Onshore EIA Report (BOWFL, 2025) and is considered appropriate for the following reasons:

- At the time of this assessment, project expenditure estimates were only available for the Project as a whole and could not be disaggregated.
- The GVA and employment impacts are estimated based on the amount of expenditure going into the supply chain in different locations (UK, Scotland or the Regional Socio-Economics Study Area) rather than the location (onshore or offshore) where the construction or operations activity associated with that expenditure occurs.
- Many activities, particularly during the operations phase, are associated with the overall development, and cannot be separated into onshore or offshore activities.
- The onshore and offshore elements of investment are intrinsically linked; neither would proceed in the absence of the other.

18.8.21 The assessment of GVA and employment impacts presented in this chapter is an update of, not additional to, the assessment of GVA and employment impacts undertaken for the Bowdun OWF Onshore EIA Report (BOWFL, 2025b).

18.8.22 The impacts will be reported in terms of:

- GVA (£m) - this is a measure of economic value added by an organisation or industry and is typically estimated by subtracting the non-staff operational costs from the revenues of an organisation. GVA impacts are presented in real, undiscounted terms.

- Jobs (FTE) - the number of Full-Time Equivalent roles created. This is used when considering employment impacts during the operational phase.
- Years of Employment (aFTE) - the total number of years of employment in Full Time Equivalent roles. This is used when considering short term employment impacts, such as those associated with the construction and decommissioning phases.

18.8.23 The key inputs for modelling the impact on GVA and employment is the expected level of project expenditure. Assumptions were derived using the supply chain expenditure targets that will inform the updated Bowdun Offshore Windfarm Supply Chain Development Statement (SCDS), a refresh of the 2023 Bowdun OWF SCDS, which is not yet published but is anticipated in 2026.

18.8.24 The refreshed SCDS is based on the Applicants assessment of evolving capabilities, competencies and capacity in the Scottish supply chain which will be required to support the development, construction and operation of the Project. This has led to several notable outcomes:

- Supply chain spend of £8 million in Scotland to date to support development.
- Implementation of an award winning[6] supply chain programme to create transition opportunities for oil and gas firms into offshore wind on the Project and with the pre-selected Tier 1 contractor responsible for delivering the majority of offshore scopes (Thistle Wind Partners, 2025).
- Expected Scottish CAPEX spend has doubled due to assumed Scottish manufacturing and fabrication spend increasing from £6 million to £182 million.

18.8.25 The Applicant derived these expenditure estimates through a structured, evidence-based assessment of the Scottish supply chain. They identified over 200 components and services required for the development and issued a Request for Information, resulting in 250 responses that they used along with supplier databases to determine which items could credibly be manufactured domestically. They also considered automation potential, transport costs, alignment with wider demand from other ScotWind projects, policy fit, and time to develop local production, to prioritise components most suitable for UK or Scottish sourcing. They applied cost assumptions such as EU pricing for foundation structures and premiums for Scottish assembly, to estimate the split of expenditure between suppliers in Scotland, UK, and Europe.

18.8.26 The SCDS expenditure estimates are provided for the capital expenditure (CAPEX) and operating expenditure (OPEX) phases of the project, split by geographic area (Scotland, UK, EU), under two scenarios - 'Commitments' and 'Ambitions'.

18.8.27 Two scenarios were modelled, aligned with the two SCDS scenarios:

[6] Supply Chain Development Award the Scottish Renewables' Scottish Green Energy Supply Chain Awards in 2025.

- Scenario 1 (Commitments Scenario) is based on the SCDS Commitments scenario, which reflects a conservative assumption for the proportion of contracts that the supply chain in Scotland and the UK would be capable of meeting, based on current capabilities.
- Scenario 2 (Ambitions Scenario) acts as a more optimistic, high-case projection, aligned with strategic objectives. It is based on the SCDS Ambitions scenario, which assumes a higher level of Scotland and UK supply chain participation, aligning with the UK's ambition to achieve 60% local content in offshore wind farms off its shores by 2030.

18.8.28 The SCDS expenditure figures includes 6 years of OPEX. This was adjusted up to include 30 years of OPEX for the full 30-year lifespan of the Project, to align with the 30-year Project lifespan assumed in Guide to an Offshore Wind Farm Update 2025 (BVG Associates, 2025).

18.8.29 Decommissioning expenditure is not included in the SCDS. An assumption was made based on the Guide to an Offshore Wind Farm (BVG Associates, 2025), which estimates that the cost for decommissioning a 1 GW offshore wind farm is £426 million (gross, excluding any resale value of equipment removed). This has been apportioned between Scotland and UK expenditure assuming the same regional split as the SCDS capital expenditure estimates.

18.8.30 For all three phases (CAPEX, OPEX and DECEX), GVA and employment effects are assessed for the UK and Scotland. For the OPEX phase, the effects are also assessed for the Regional Socio-Economics Study Area (comprising Aberdeenshire, Aberdeen City or Angus), because the Applicant has committed to locating an O&M port within this regional area. This more localised assessment of GVA and employment impacts was not included for the CAPEX and DECEX phases as the location of construction & marshalling ports within Scotland have not yet been selected.

18.8.31 Table 18.27 and Table 18.28 illustrate the expenditure allocated across the three geographies for the two modelled scenarios. The figures in the tables are inclusive, i.e. Scotland spend includes the Regional Socio-Economics Study Area, UK includes Scotland, and Rest of World includes UK.

Table 18.27: Scenario 1 – Commitments Scenario

Categories of spend		Regional Socio-Economics Study Area (£m)	Scotland (£m)	UK (£m)	Total Spend (including Rest of World) (£m)
CAPEX	Development	-	£57	£89	£114
	Manufacturing/ Fabrication	-	£182	£584	£2,995
	Installation	-	£272	£458	£1,030
OPEX	Operation + Maintenance	£637	£1,820	£1,820	£2,245
DECEX	Decommissioning	-	£53	£116	£426

Table 18.28: Scenario 2 – Ambitions Scenario

Categories of spend		Regional Socio-Economics Study Area (£m)	Scotland (£m)	UK (£m)	Total Spend (including Rest of World) (£m)
CAPEX	**Development**	-	£57	£89	£114
	Manufacturing/ Fabrication	-	£1,046	£1,815	£2,995
	Installation	-	£278	£464	£1,030
OPEX	**Operation + Maintenance**	£910	£1,820	£1,820	£2,245
DECEX	**Decommissioning**	-	£141	£242	£426

18.8.32 Sectoral multipliers are applied to the projected investment figures to estimate effects on GVA and Employment for three types of economic impact:

- Direct Impacts: The immediate impacts (value and jobs created) that arise from each phase of the Project by organisations directly involved in project delivery.
- Indirect Impacts: The impacts generated by supply chain activity i.e. supply of goods and services to the direct contractors.
- Induced Impacts: The impacts generated from the increased household spending by those employed directly or indirectly through the project.

18.8.33 Multipliers are published by the UK and Scottish government or derived from national Input-Output tables. They vary by type of impact (Employment or GVA impacts; Direct, Indirect or Induced), expenditure location (UK or Scotland), and industry sector. Assumptions have been made regarding the industry sectors associated with each project phase and category of spend in order to allocate the relevant multiplier for each portion of expenditure.

18.8.34 There is also a potential impact on employment and supply chains due to potential disruption to onshore businesses associated with the processing of commercial fish and/or within commercial fishing supply chains. Volume 2, Chapter 13: Commercial Fisheries has been reviewed to determine the significance of effect, and the extent to which this could have an impact on GVA and employment.

18.8.35 The magnitude of change is classified as High, Medium, Low, or Negligible, based on the criteria set out in Table 18.29, using percentage changes in GVA and employment relative to the baseline. The percentage change in GVA is quantified relative to the total baseline GVA of the total Regional Socio-Economics Study Area, Scottish, and UK economies. The percentage change in employment is quantified relative to the baseline employment in relevant supply chain industries.

Table 18.29: Magnitude of Change Criteria

Magnitude of impact	Low bound	Upper bound
High	1.0%	-
Medium	0.5%	1.0%
Low	0.1%	0.5%
Negligible	-	0.1%

Demographics

18.8.36 The demographic impact of the Proposed Development is driven by:

- The number of direct and indirect jobs expected to be created during the construction and O&M phases;
- The proportion of these jobs that are taken up by workers who do not already reside within the area; and
- The duration of contracts associated with the Proposed Development.

18.8.37 The sensitivity of each of the demographic receptors will be determined by the trends in demographics in the potential host communities, projections estimated for how these demographics will change over time, and how the demographics of the workforce would relate to different communities.

18.8.38 At the time of undertaking the assessment, the location of the ports to be used for construction and decommissioning of the Proposed Development are not known. This precludes an assessment of demographic change on specific host communities for these phases at this stage. For O&M, the Applicant has committed to a port in Aberdeen City, Aberdeenshire or Angus, however the specific location is not yet known, so two scenarios were assessed, a rural port location and an urban port location. Montrose and Arbroath were used as a proxy for a rural location and Aberdeen City for an urban location.

18.8.39 The magnitude of change is assessed by comparing the population increase resulting from employment associated with the Proposed Development to the existing population within the relevant Travel to Work Area (TTWA)[7] of each of the proxy Urban and Rural locations, and by evaluating this change against the area's average annual net population growth.

18.8.40 The criteria for defining these changes are outlined in Table 18.30.

[7] Travel to Work Areas (TTWA) have been developed across the UK to approximate self-contained labour market areas. They are areas where most people both live and work and therefore relatively few commuters cross a TTWA boundary on their way to work.

Table 18.30 Magnitude of change criteria – Demographics

Magnitude of Impact	Definition
High	The impact on demographic changes would be considered to have a high magnitude if the change in residual population was equivalent to 100% or more of the average annual growth rate for the study area.
Medium	The impact on demographic changes would be considered to have a medium magnitude if the change in residual population was equivalent to between 50% and 100% of the average annual growth rate for the study area.
Low	The impact on demographic changes would be considered to have a low magnitude if the change in residual population was equivalent to between 25% and 50% of the average annual growth rate for the study area.
Negligible	The impact on demographic changes would be considered to have a negligible magnitude if the change in residual population was equivalent to less than 25% of the average annual growth rate for the study area.
No Change	No population changes are expected to occur.

18.8.41 Demographic changes can have positive and negative economic and socio-cultural implications. This sub-topic considers changing demographics through an economic lens, in relation to labour market dynamics and economic growth and development. For example, an aging population can result in a shrinking workforce, leading to potential labour shortages and putting pressure on social security systems. Demographic shifts towards a larger working age population and smaller proportion of dependents can potentially boost economic activity through a reduction in reliance on social security and increased expenditure in the economy. However, a rapid expansion of population can place strain on infrastructure and resources which planning and investment may not be able to keep up with, having an adverse impact on economic development.

18.8.42 The potential for demographic changes to have an impact is also linked to changes to demand for housing and local services and on socio-cultural factors; this is considered separately under those sub-topics.

Changes to Demand for Housing and Local services

18.8.43 The impact on demand for housing as well as health services, education services, local leisure and recreation services, public transport services, and local services is influenced by the number of jobs created during the Project and how many of those jobs are filled by workers who do not already live in the area. As described above, a sudden growth in the population of an area can place strain on infrastructure and resources, affecting the ability of residents to access vital services.

18.8.44 Changes in demand for local services can have both positive and negative effects, depending on the type of service affected and the existing conditions within the area. In some cases, population growth can help sustain essential services, while in others it may create additional strain. For example, a rise in the number of school age children in a rural community could strengthen the case for maintaining local education provision. Conversely, overall population increases might intensify pressure on local healthcare services. The outcome is more likely to be negative if service provision cannot adjust to meet changing demand.

18.8.45 A location specific assessment cannot be completed as the ports have not yet been selected so the affected host communities are currently unknown. The assessment broadly considers potential impacts related to the demand for housing and services. For O&M, baseline data was gathered for the local authorities in which potential ports are likely to be situated to provide an indication of the capacity of these areas to respond to changes.

Changes to Tourism and Recreation Receptors

18.8.46 The tourism and recreation assessment will be based on the sensitivity of the tourism economy, tourism and recreation receptors in the Tourism and Recreation Study Area and the magnitude of any potential change in behaviour.

18.8.47 Changes to tourism and recreation receptors are focused on how the Proposed Development could result in changes to the amenity value of the receptor arising from environmental effects and therefore affect visitor/user behaviour. Relevant environmental impacts on land-based tourism and recreation receptors are derived from the following EIA chapters: Volume 1, Chapter 16: Infrastructure and Other Users, Volume 1, Chapter 20: Seascape, Landscape and Visual Impacts, and Volume 1, Chapter 21: Cultural Heritage. Relevant environmental impacts on water-based receptors (marine recreation) are derived from the following EIA chapters: Volume 1, Chapter 14: Shipping and Navigation, Volume 1, Chapter 16: Infrastructure and Other Users and Volume 1, Chapter 20: Seascape, Landscape and Visual Impacts.

18.8.48 Visual receptors identified within the Seascape, Landscape and Visual Impacts Study Area (Volume 1, Chapter 20; Seascape, Landscape and Visual Impacts) that have been considered within this assessment include but are not limited to, the following receptors:

- walkers, equestrians and cyclists using the public rights of way networks;
- users of beaches, public open spaces and common land;
- tourists and visitors using facilities such as hotels and cafes within settlements;
- tourists and visitors at coastal caravan and camping sites; and
- tourists and visitors at attractions and points of interest.

18.8.49 As noted in the Volume 1, Chapter 20: Seascape, Landscape and Visual Impacts the viewpoints are 'considered to be representative of views available to recreational receptors in proximity'. Accordingly, a buffer was applied to these to determine whether additional tourism and recreation receptors were located close by that could also be impacted; specifically, coastal paths and tourist accommodation. These receptors, in addition to those identified in Volume 1, Chapter 21; Cultural Heritage, have been considered in the tourism and recreation assessment in terms of how visitor behaviour could be affected.

18.8.50 If significant residual effects on these receptors are identified in the relevant EIA chapters, the tourism and recreation assessment will consider whether the receptors are sensitive to the specific environmental effect identified. This will be considered in relation to how visitors could be deterred as a result of changes in amenity and whether this could impact on the Tourism and Recreation Study Area economy.

Socio-Cultural Impacts

18.8.51 As the construction and decommissioning port locations have not yet been selected, the local communities that would be affected during these phases are currently unknown. For O&M, socio-cultural impacts are considered broadly in relation to coastal communities in the Regional Socio-Economics Study Area. The Local Socio-Economics Study Area of Mearns is also considered as impacts relate to Gourdon and Johnshaven, the settlements located nearest to Landfall.

18.8.52 It is acknowledged that communities in proximity of activities related to the Proposed Development could perceive it as having a negative impact on the socio-cultural characteristics of the area, arising from potential impacts associated with all phases of activity, a transient construction workforce or the visual impact of Wind Turbines and vessels used for construction and O&M. Such perceptions could result in changes to quality of life and increased community stress. However, the generation of employment opportunities in the area could have a positive effect on community confidence, quality of life, and wellbeing for individuals who secure these jobs and whose businesses benefit indirectly.

18.8.53 The marine environment plays a vital role in supporting the health and prosperity of coastal communities. It sustains a wide variety of marine life and underpins local industries such as fishing, tourism, and recreation. People living in coastal areas often have a strong connection to the coast and marine environment, which can positively influence both physical and mental wellbeing (Geiger, et al., 2023). The assessment considers how the Proposed Development could influence such factors and thereby affect the wellbeing of coastal communities.

18.8.54 The assessment of socio-cultural impacts is qualitative, drawing on the socio-economic baseline of the area and utilising outputs from the other socio-economic, tourism and recreation sub-topics. The assessment considers the research undertaken by Scottish Government in relation to public perceptions of OWFs, and available evidence from communities with a similar previous experience of offshore wind (Scottish Government, 2022). It has also been informed by the wider stakeholder engagement exercise presented in Volume 1, Chapter 5: Stakeholder Engagement and Consultation. Vulnerable population groups who may be disproportionately impacted by the Proposed Development (e.g. fishing communities) are also considered where relevant.

18.9 Embedded Measures and Mitigation

18.9.1 As part of the design process, a number of embedded mitigation and monitoring measures have been proposed to reduce the potential for impacts relevant to Socio-Economics, Tourism and Recreation. These are noted in Table 18.31 and**see Volume 3, Technical Appendix 4.6: Schedule of Mitigation and Commitments

18.9.2 Table 18.32. They are considered at every stage of the Proposed Development through design and best practice and, as there is a commitment to implementing these measures, these have been considered in the assessment presented in Section 18.10 (i.e. the determination of magnitude and therefore significance assumes implementation of these measures).

18.9.3 Mitigation measures outlined in the Socio-Economic, Tourism and Recreation assessment for the Onshore Infrastructure are also considered as embedded, such as the provision of a Construction Traffic Environmental Management Plan to reduce environmental effects and reduce distribution to local communities and receptors.

Table 18.31: Embedded Measures Adopted as Part of the Proposed Development

ID*	Embedded Measures Adopted as Part of the Proposed Development	Justification
7	Development of, and adherence to, a Construction Method Statement (CMS) along with a Code of Construction Practice (CoCP).	The CMS will reduce any risks and potential impacts on the towns near proposed construction ports and the settlements near landfall arising from construction . The CoCP sets broader standards, and will reduce disruption of traffic, the environment as well as the wider communities in the settlements near construction ports and landfall.
8	All relevant Health and Safety Executive (HSE) procedures will be followed.	The HSE procedures provide structured and documented methods to reduce risks for workers and members of the public at all construction and O&M locations for the Project. Under HSE, employers are required to identify risks and implement controls during construction and O&M.
9	Development of, and adherence to, a combined Navigational Safety and Vessel Management Plan (NSVMP), describing Project vessels' requirements, passages, monitoring and controls.	The NSVMP reduces risks of vessel collisions in the sea during construction and O&M. As part of the NSVMP, marine coordination and vessel procedures are implemented, for instance, guard vessels may be used to ensure safe passing distances between vessels. This will reduce potential impacts on marine recreation activity.
10	Development of, and adherence to, a Fisheries Mitigation, Monitoring and Communication Plan (FMMCP). The FMMCP includes details of the measures which are proposed to be implemented to reduce impacts on commercial fishing, the approach to monitoring fisheries activity and the approach to fisheries liaison and procedures to manage interactions	The FMMCP will limit potential impacts on commercial fishing activity by keeping fishing industry workers informed of the activities associated with the Proposed Development and by minimising potential impacts on day-to-day fishing operations.

ID*	Embedded Measures Adopted as Part of the Proposed Development	Justification
	between the Proposed Development and the fishing industry.	
11	Appointment of a Company Fisheries Liaison Officer (CFLO). The CFLO will support ongoing liaison and ensure clear communication between the Applicant and commercial fishers.	The appointment of the CFLO will keep fishing industry and workers informed of the activities associated with the Proposed Development and will reduce potential impacts on fishing operations. Consultation with the commercial fishing industry via the CFLO will ensure clear and efficient communication during all phases of the Proposed Development.
12	Advance warning and accurate location details of planned operations, associated Safety Zones and advisory passing distances will be given via Notices to Mariners (NtMs) and Kingfisher Bulletins.	Advance notification of Project activity will be promulgated to other marine users to reduce disturbance to them and to ensure the fishing industry workers are informed and aware of any risks.
13	Development of, and adherence to, a Lighting and Marking Plan (LMP). The LMP will confirm compliance with legal requirements with regards to shipping, navigation and aviation marking and lighting.	Developed post-consent. It will include details on remote monitoring, contingency planning for marking array boundaries during major maintenance works, and procedures for responding to outages. This will reduce risk of vessel allision/contact with offshore infrastructure during O&M, reducing risk for commercial fishing vessels.
14	Adherence to best practice guidance with regards to fisheries liaison and procedures in the event of interactions between the Proposed Development and fishing activities (e.g. Fisheries Liaison with Offshore Wind and Wet Renewables group (FLOWW), 2025).	Adherence to guidance and protocols will ensure limited disruption on fishing operations in terms of loss of access and fishing gear damage, minimising potential economic impacts to the industry.
15	Participation in relevant commercial fisheries working group.	Participation will assist with liaison between the Proposed Development and the fishing community, keeping the fishing industry and workers informed and to reduce potential impacts on fishing operations.
23	Development of, and adherence to, an Operation and Maintenance Programme (OMP) in conjunction with approved post-consent construction plans.	Adherence to the OMP decreases risks of vessel collisions during construction and O&M and reduces potential impacts on O&M port towns by providing advance notice and a schedule of Proposed Development activities.
26	The Applicant will work with other developers, Government, and key stakeholders to assist in addressing barriers to local supply chain participation.	Part of the commitments outlined in the SCDS, this measure aims to improve economic outcomes for local supply chain businesses.
27	The Applicant will engage with local supply chain as part of a developing strategy to leverage oil and gas competencies and maximise local content as much as practicable for the Proposed Development.	Part of the commitments outlined in the SCDS, this measure aims to support skills transfer for people transitioning from the oil and gas sector to renewables, and to provide meaningful employment in the Regional Socio-Economic Study Area.

ID*	Embedded Measures Adopted as Part of the Proposed Development	Justification
28	The Energy Pathfinder will be followed to ensure visibility of the work programme and an opportunity for Scottish and UK suppliers to bid for work.	Part of the commitments outlined in the SCDS, this measure aims to improve economic outcomes for Scottish and UK supply chain businesses.
34	Drafting and implementation of a decommissioning programme, prepared in accordance with requirements of the Energy Act 2004, which will set out the extent of infrastructure to be removed as well as the methods and processes which will be used.	This will reduce potential impacts on settlements local to the ports which are likely to see increased activity during decommissioning.
48	Where boulder removal is required during site preparation, the location of large boulders that are relocated and may pose a snagging risk for fishing gear, will be disclosed to the fishing industry within a timely manner and in an accessible format.	Decreases the risk of allision/contact with boulders and decreases the risk of fishing gear snagging. This reduces any potential disruption to day-to-day commercial fishing activity.
56	Drafting of an Accommodation Strategy, once port location(s) is known, to support construction activity.	An Accommodation Strategy is being prepared for the Project and would be progressed during the MSC stage. This document will set out how the Project will meet the demand for accommodation from its workforce, providing clarity on accommodation for workers and avoiding disruption to local accommodation. Further details are provided in Paragraph 18.10.74.

**see Volume 3, Technical Appendix 4.6: Schedule of Mitigation and Commitments

Table 18.32: Monitoring Commitments for the Proposed Development

ID*	Monitoring Commitment	Justification
3	Engage and contribute to relevant regional and strategic monitoring, where appropriate to do so for the Proposed Development, giving due consideration to the Scottish Marine Energy Research (ScotMER) programme (or any successor programme formed to facilitate these research interests), or any developer lead regional groups.	The Applicant will engage with MD-LOT, NatureScot, and other relevant key stakeholders and contribute to targeted and proportionate regional or strategic monitoring, if appropriate and relevant to the Proposed Development. This monitoring will assist with improving understanding of the socioeconomic effects of offshore wind development. The approach will take account of Evidence Maps published through the ScotMER forum (Scottish Government, 2024) ensuring that monitoring efforts support national research priorities and contribute to a more robust evidence base on the socioeconomic implications of offshore wind.
6	Monitor expenditure throughout the supply chain to evaluate its impacts and determine whether the commitments outlined in the SCDS are being met. This will also help identify necessary actions to	To monitor socio-economic impacts and validate the conclusions of the Offshore EIA Report.

ID*	Monitoring Commitment	Justification
	ensure the maximisation of spending commitments as per the SCDS.	
7	Review of potential socio-economic impacts following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.	To monitor socio-economic impacts and validate the conclusions of the Offshore EIA Report.

**see Volume 3, Technical Appendix 4.6: Schedule of Mitigation and Commitments

18.10 Assessment of Significance

18.10.1 Table 18.22 summarises the potential effects arising from the Construction, O&M and Decommissioning phases of the Proposed Development, as well as the MDS against which each impact has been assessed. An assessment of the likely significance of the effects of the Proposed Development on the socio-economics, tourism and recreation receptors caused by each identified impact is given below.

18.10.2 Sensitivity of the receptors used to inform significance is assigned using the baseline information provided Section 18.6 and in Volume 3, Technical Appendix 18.1: Socio-Economics, Tourism and Recreation Baseline.

IMPACT 1 – GVA, EMPLOYMENT AND SUPPLY CHAIN

Construction phase

Magnitude of Impact

18.10.3 The assessment of GVA and Employment impacts comprises both the onshore and offshore elements of the Project. The assumptions and detailed methodology for this assessment are outlined in Volume 3, Technical Appendix 18.2: Socio-Economic Impact Quantitative Assessment Methodology.

18.10.4 The net-zero sector is growing three times faster than the wider economy, with a 10.1% increase in total economic value over the past year, adding £7.7 billion to UK GVA. In contrast, the overall UK economy grew by just 3.2% in the same period (CBI Economics, 2025). Net-zero businesses support nearly one million jobs across the UK (Energy & Climate, 2025). In Scotland, GVA per full-time equivalent worker (i.e., productivity) reached £104,037, much higher than the regional average (CBI Economics, 2025). The net-zero economy is driven by high-value skilled jobs. More productive roles are generally associated with higher pay, with average salaries for employees in the net-zero industry around £43,100, exceeding the national average by 15% (CBI Economics, 2025). For example, Wind Turbine technicians, who play a vital role in expanding renewable energy infrastructure, earn between £25,000 and £47,000 depending on experience (National Careers Service, 2025). As the UK accelerates its green transition, investing in high-value skilled jobs will be key to driving regional growth, boosting productivity, and building a resilient, future-ready workforce.

18.10.5 The Project would present a strategic opportunity to integrate the existing Scottish oil and gas supply chain firms into the offshore wind sector via a supply chain pathways programme aimed at facilitating the transition of traditional energy service providers into renewable energy markets. As described in Paragraph 18.6.17, the Applicant is committed to developing the offshore wind sector's workforce and skills, includes engaging with local suppliers and industry groups to understand their capacity to support the construction of the Project. The Applicant's supply chain strategy seeks to address structural barriers that have historically limited local participation in offshore wind development, particularly the dominance of Tier-1 contractors.

18.10.6 Through early engagement and collaboration with DEME Offshore, a global leader in offshore wind installation, the initiative will enable Scottish firms to pre-qualify for procurement opportunities not only within Bowdun but across broader UK and international projects. Furthermore, engaging with Scottish Enterprise Agencies and clusters that possess technical and contractual expertise can help de-risk supply chain investments and support local businesses that have relevant skills but limited offshore wind experience. By aligning investment planning and capability development with project requirements, the programme aspires to leverage Scotland's engineering expertise to foster regional economic diversification, enhance workforce resilience, and contribute to the global expansion of renewable energy supply chains (Offshore Engineer, 2025).

18.10.7 Furthermore, there is potential for an impact on employment and supply chains due to potential disruption to onshore businesses associated with the processing of commercial fish and/or within commercial fishing supply chains. A reduction in access to established fishing grounds, or increased disruption to fishing activity could have an adverse impact on GVA and employment. However, as assessed in Volume 2, Chapter 13: Commercial Fisheries, any disruption is deemed temporary and avoidable, with no likely significant effects to commercial fishing reported. As a result, likely significant effect on employment and supply chains arising from potential impacts on the fishing industry are not considered to be at a level that would be perceptible.

18.10.8 Table 18.33 and Table 18.34 show the potential impacts under each scenario. The labour market includes employment in sectors associated with the Proposed Development. The sectors are aligned with ONS industry categories (Office for National Statistics, 2025) and are as follows:

- Manufacturing
- Electricity, gas, steam and air conditioning supply
- Water supply, sewerage, waste & remediation activities
- Construction
- Transport and storage
- Financial and insurance activities
- Professional, scientific and technical activities
- Administrative and support service activities.

18.10.9 The potential economic impact has been assessed across direct, indirect, and induced effects for GVA and Employment for two scenarios, with outputs presented in Table 18.33 and Table 18.34. Potential impacts on GVA are presented in real, undiscounted terms. The majority of these potential impacts would be expected to occur during the construction phase, which is expected to be five years.

Table 18.33: Scenario 1 (Commitments Scenario) Construction Outputs

	Scotland	UK
Direct GVA	£214 mln	£450 mln
Indirect GVA	£113 mln	£340 mln
Induced GVA	£69 mln	£202 mln
Total GVA	**£396 mln**	**£992 mln**
Direct annual. Employment	2,899 aFTE	6,201 aFTE
Indirect annual. Employment	1,474 aFTE	5,551 aFTE
Induced annual. Employment	748 aFTE	2,874 aFTE
Total Annualised Employment	**5,121 aFTE**	**14,626 aFTE**
Direct Employment	725 FTE	1,550 FTE
Indirect Employment	368 FTE	1,388 FTE
Induced Employment	187 FTE	718 FTE
Total Employment	**1,280 FTE**	**3,656 FTE**

18.10.10 Scenario 1 (Commitments Scenario) CAPEX project expenditure would be expected to result in a total GVA impact of:

- £396 million in Scotland, a 0.22% increase on the baseline total of £183.5 billion, considered a Low magnitude of change.
- £992 million in the UK, a 0.04% increase on the baseline total of £2,601.6 billion, considered a Negligible magnitude of change.

18.10.11 Scenario 1 (Commitments Scenario) CAPEX project expenditure would be expected to result in a total Employment impact of:

- 5,121 aFTEs in Scotland, equivalent to 1,280 FTEs, a 0.13% increase on the baseline total of 1.02 million FTEs, considered a Low magnitude of change.
- 14,626 aFTEs in the UK, equivalent to 3,656 FTEs, a 0.02% increase on the baseline total of 14.67 million FTEs, considered a Negligible magnitude of change.

18.10.12 Outputs for Scenario 2 (Ambitions Scenario) are the same for CAPEX.

Table 18.34: Scenario 2 (Ambitions Scenario) Construction Outputs

	Scotland	UK
Direct GVA	£585 mln	£963 mln
Indirect GVA	£278 mln	£624 mln

	Scotland	**UK**
Induced GVA	£196 mln	£410 mln
Total GVA	**£1,059 mln**	**£1,998 mln**
Direct annual. Employment	7,454 aFTEs	12,827 aFTEs
Indirect annual Employment	3,591 aFTEs	10,132 aFTEs
Induced annual Employment	2,215 aFTEs	5,751 aFTEs
Total Annualised Employment	**13,261 aFTEs**	**28,710 aFTEs**
Direct Employment	1,864 FTEs	3,207 FTEs
Indirect Employment	898 FTEs	2,533 FTEs
Induced Employment	554 FTEs	1,438 FTEs
Total Employment	**3,315 FTEs**	**7,177 FTEs**

18.10.13 Scenario 2 (Ambitions Scenario) CAPEX project expenditure would be expected to result in a total GVA impact of:

- £1,059 million in Scotland, a 0.58% increase on the baseline total of £183.5 billion, considered a Medium magnitude of change.
- £1,998 million in the UK, a 0.08% increase on the baseline total of £2,601.6 billion, considered a Negligible magnitude of change.

18.10.14 Scenario 2 (Ambitions Scenario) CAPEX project expenditure would be expected to result in a total Employment impact of:

- 13,261 aFTEs in Scotland, equivalent to 3,315 FTEs, a 0.33% increase on the baseline total of 1.02mln FTEs, considered a Low magnitude of change.
- 28,710 aFTEs in the UK, equivalent to 7,177 FTEs, a 0.05% increase on the baseline total of 14.67mln FTEs, considered a Negligible magnitude of change.

<u>Sensitivity of Receptor</u>

18.10.15 The identified receptors (Scottish, and UK-wide economies labour markets) align closely with key policy priorities at both the regional level and across Scotland and the wider UK. Assigned sensitivity for these receptors and justification is provided in Table 18.35.

Table 18.35: Receptor Sensitivity – GVA and Employment

Receptor	Sensitivity	Justification
Economy		
UK	Low	At a UK level, in February the Bank of England forecast UK GDP growth to slow from 1.4% in 2025 to 0.9% in 2026 before strengthening to 1.5% in 2027 and 1.9% in 2028. Subdued growth in 2026 reflects the persistence of weak demand, uncertainty and a slight drag from past monetary tightening (Scottish Government, 2026). This growth is expected to be led by regions such as London and the East of England, which benefit from a high concentration of high-growth sectors including information and communication, professional services, and financial activities (EY UK, 2025). Areas outside the South-east, particularly in the North of England, Wales and Northern Ireland, experience below-average GVA growth, reflecting structural imbalances in sectoral composition and productivity (Nguyen, 2019). However, the scale, adaptability and capacity of the UK economy, combined with ongoing policy interventions that aim to increase growth, develop skills (Institute for Government, 2022) and encourage sectoral investment (UK Government, 2024), reduce its vulnerability. The UK's GVA is assigned a Low sensitivity rating due to its diversified sectoral strengths and overall resilience.
Scotland	Medium	Following expected growth of 1.1% in 2025 the SFC forecast Scottish GDP growth to strengthen to 1.3% in both 2026 and 2027. Overall, stable growth prospects for 2026–27 and easing inflation support a cautiously positive economic outlook, though labour-market softening, weak demand, cost pressures, and rising geopolitical and trade uncertainties continue to pose notable risks (Scottish Government, 2026). Scotland's economic structure is a key factor in its sensitivity. Overall, Scotland's long-standing challenges include business growth, skills gaps, and regional productivity disparities, with rural areas facing greater economic fragility and slower recovery rates (Williams *et al.*, 2025). Despite these challenges, Scotland's economy benefits from its overall size, policy prioritisation, and institutional resilience, which mitigate its exposure to short-term shocks. The Scottish Government's National Strategy for Economic Transformation and regional development frameworks aim to address structural weaknesses and promote inclusive growth (Scottish Government, 2022a). Scotland's GVA is assigned a Medium sensitivity rating, reflecting sectoral underperformance and regional disparities.
Labour Market		
UK	Medium	Across the UK, employment growth is forecast to average 1.1% annually from 2024 to 2027 (EY UK, 2025), supported by strong performance in regions with high-growth industries such as finance, technology, and professional services. While the national labour market is resilient, with active workforce development policies (e.g. Skills Bootcamps (Department for Education, 2025), employment rates vary significantly across UK regions (Office for National Statistics, 2025). Unemployment is expected to rise to 5.25% over 2026 (Scottish Government, 2026). Therefore, the receptor sensitivity is Medium.
Scotland	Medium	Scotland's labour market has shown headline resilience, with low unemployment and growth in real earnings in 2025 (Scottish Government, 2026). However, underlying indicators point to moderate vulnerability. Employment growth is forecast at 0.8% annually from 2024–2027, below the UK average of 1.1%. Structural challenges include a 32% year-on-year decline in job adverts, underrepresentation in high-growth sectors, (Scottish Government, 2025) (EY UK, 2025).

Receptor	Sensitivity	Justification
		Unemployment in Scotland remained low at 3.7% in late 2025, but signs of labour-market loosening are emerging, with fewer payrolled employees, slower pay growth, and business surveys reporting falling staffing levels, even as the unemployment rate dipped slightly over the year (Scottish Government, 2026). While Scotland's overall labour market has shown resilience, regional disparities persist, particularly in areas with lower productivity and sectoral concentration, making them more vulnerable to economic shocks (Fraser of Allander Institute & Scottish Centre for Employment Research, 2017). Overall, employment in the Scottish labour market is assigned a Medium sensitivity.

Significance of the Effect

18.10.16 Table 18.36 presents a summary of the combined magnitude of change and sensitivity of the receptors, and the resulting significance which is defined using the significance matrix in Table 18.25.

18.10.17 In cases where the significance matrix indicates a range (e.g. Moderate to Minor), for an employment impact in Scotland or the Local Area, the higher rating has been assigned because it is expected that many of the jobs created, particular those in the local area and Scotland, will be high-value jobs, as explained in more detail in section 18.10.4. In any other cases where the significance matrix indicates a range (i.e. for GVA effects, or UK employment effects), the higher or lower rating has been assigned based on whether the estimated impact percentage is higher or lower in the band for determining the magnitude rating. For example, an impact of 0.4% is higher in the band of 0.1% - 0.5% for a Low magnitude of impact; so in this case if the significance matrix indicated a range such as Negligible to Minor it would be given a Minor significance rating.

Additional Mitigation and Residual effect

18.10.18 No Additional Mitigation is considered necessary as the likely significant environmental effects identified are beneficial in EIA terms.

Table 18.36: Significance - Construction

Construction	Receptor	Magnitude of Impact	Sensitivity	Significance Rating	Significance
Scotland					
Scenario 1 (Commitments Scenario)	GVA	Low	Medium	Minor (Beneficial)	Not Significant
	FTEs	Low	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Medium	Medium	Moderate (Beneficial)	Significant (Beneficial)
	FTEs	Low	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

Operation phase

Magnitude of Impact

18.10.19 As outlined in A Guide to UK Offshore Wind Operations and Maintenance (Scottish Enterprise and Crown Estate, 2013), jobs created during the O&M phase are expected to fall within the following categories:

- Onshore logistics: port-side activity, warehousing and on-site office space;
- Offshore logistics: equipment, planning and resources required to move people and equipment at sea;
- Back office, administration and operations: performance monitoring, electricity sales etc;
- Turbine maintenance: technicians and equipment needed to inspect and repair the wind turbines;
- Export cable and grid connection: technicians and equipment needed to inspect and repair the connection of the offshore power plant to the onshore power transmission system, including onshore and offshore electrical substations and export cables;
- Array cable maintenance: technicians and equipment needed to inspect and repair the subsea cables that connect the turbines to create a unified power plant; and
- Foundation maintenance: technicians and equipment needed to inspect and repair the turbine foundations and subsea structures.

18.10.20 The Applicant estimates that the expected salaries for jobs directly created by the Project will range from £40,000 to £120,000, with many roles having a higher salary than the Aberdeenshire average of £47,170 (Aberdeenshire Council, 2025).

18.10.21 During O&M, there is expected to be a low level of vessel activity related to the Proposed Development across a long time period, so the impact on commercial fishing activity is expected to be lower than during the construction phase, without any perceptible impacts on GVA and employment.

18.10.22 Table 18.37 and Table 18.38 present the estimated direct, indirect, and induced effects for GVA and employment under each scenario. GVA impacts are presented in real, undiscounted terms.

Table 18.37: Scenario 1 (Commitment Scenario) Operation Outputs

	Regional Socio-Economics Study Area	Scotland	UK
Direct GVA	£318 mln	£909 mln	£909 mln
Indirect GVA	£116 mln	£332 mln	£332 mln
Induced GVA	£88 mln	£251 mln	£251 mln
Total GVA	**£522 mln**	**£1,493 mln**	**£1,493 mln**
Direct annual. Employment	3,257 aFTEs	9,305 aFTEs	9,305 aFTEs

	Regional Socio-Economics Study Area	Scotland	UK
Indirect annual. Employment	1,818 aFTEs	5,194 aFTEs	5,194 aFTEs
Induced annual. Employment	1,204 aFTEs	3,441 aFTEs	3,441 aFTEs
Total Annualised Employment	**6,279 aFTEs**	**17,940 aFTEs**	**17,940 aFTEs**
Direct Employment	109 FTEs	310 FTEs	310 FTEs
Indirect Employment	61 FTEs	173 FTEs	173 FTEs
Induced Employment	40 FTEs	115 FTEs	115 FTEs
Total Employment	**209 FTEs**	**598 FTEs**	**598 FTEs**

18.10.23 Scenario 1 (Commitment Scenario) OPEX project expenditure would be expected to result in a total GVA impact of:

- £522 million in the Regional Socio-Economics Study Area, a 2.51% increase on the baseline total of £20.9 billion GVA, considered a high magnitude of change.
- £1,493 million in Scotland, a 0.82% increase on the baseline total of £183.5 billion GVA, considered a medium magnitude of change.
- £1,493 million in the UK, a 0.06% increase on the baseline total of £2,601.6 billion GVA, considered a negligible magnitude of change.

18.10.24 Scenario 1 (Commitment Scenario) OPEX project expenditure would be expected to result in a total Employment impact of:

- 6,279 aFTEs, equivalent to 209 FTEs, in the Regional Socio-Economics Study Area, a 0.19% increase on the baseline total of 108,875 FTEs, considered a low magnitude of change.
- 17,940 aFTEs in Scotland, equivalent to 598 FTEs, a 0.06% increase on the baseline total of 1.02mln FTEs, considered a negligible magnitude of change.
- 17,940 aFTEs in the UK, equivalent to 598 FTEs, a 0.00% increase on the baseline total of 14.67mln FTEs, considered a negligible magnitude of change.

Table 18.38: Scenario 2 (Ambitions Scenario) Operation Outputs

	Regional Socio-Economics Study Area	Scotland	UK
Direct GVA	£455 mln	£909 mln	£911 mln
Indirect GVA	£166 mln	£332 mln	£332 mln
Induced GVA	£126 mln	£251 mln	£251 mln
Total GVA	**£746 mln**	**£1,493 mln**	**£1,493 mln**
Direct annual. Employment	4,652 aFTEs	9,305 aFTEs	9,305 aFTEs

	Regional Socio-Economics Study Area	Scotland	UK
Indirect annual Employment	2,597 aFTEs	5,194 aFTEs	5,194 aFTEs
Induced annual Employment	1,721 aFTEs	3,441 aFTEs	3,441 aFTEs
Total Annualised Employment	**8,970 aFTEs**	**17,940 aFTEs**	**17,940 aFTEs**
Direct Employment	155 FTEs	310 FTEs	310 FTEs
Indirect Employment	87 FTEs	173 FTEs	173 FTEs
Induced Employment	57 FTEs	115 FTEs	115 FTEs
Total Employment	**299 FTEs**	**598 FTEs**	**598 FTEs**

18.10.25 Scenario 2 (Ambitions Scenario) OPEX project expenditure would be expected to result in a total GVA impact of:

- £746 million in the Regional Socio-Economics Study Area, a 3.58% increase on the baseline total of £20.9 billion GVA, considered a high magnitude of change.
- £1,493 million in Scotland, a 0.81% increase on the baseline total of £183.5 billion GVA, considered a Medium magnitude of change.
- £1,493 million in the UK, a 0.06% increase on the baseline total of £2,601.6 billion GVA, considered a negligible magnitude of change.

18.10.26 Scenario 2 (Ambitions Scenario) OPEX project expenditure would be expected to result in a total Employment impact of:

- 8,970 aFTEs, equivalent to 299 FTEs, in the Regional Socio-Economics Study Area, a 0.27% increase on the baseline total of 108,875 FTEs, considered a low magnitude of change.
- 17,940 aFTEs in Scotland, equivalent to 598 FTEs, a 0.05% increase on the baseline total of 1.02 million FTEs, considered a negligible magnitude of change.
- 17,940 aFTEs in the UK, equivalent to 598 FTEs, a 0.00% increase on the baseline total of 14.67 million FTEs, considered a negligible magnitude of change.

Sensitivity of Receptor

18.10.27 The identified receptors (regional, Scottish, UK-wide economies and labour markets) align closely with key policy priorities at both the local level and across Scotland and the wider UK. Assigned sensitivity for these Scotland and UK-wide receptors is provided in Table 18.35

18.10.28 Table 18.35, and for the Regional Socio-Economic Study Area is provided in Table 18.39.

Table 18.39 Sensitivity of Receptors

Receptor	Sensitivity	Justification
Economy		
Regional Socio-Economic Study Area	High	The Regional Socio-Economic Study Area has long been closely tied to the UK's oil and gas economy. The North Sea industry became a major economic force for the region beginning in the 1970s, driving population growth, employment, and higher earnings across Aberdeen and Aberdeenshire. Research shows that the arrival and peak of oil and gas activity significantly shaped the area's development, embedding the sector as a core driver of local economic performance (Just Transition Lab, 2023). As the global energy system transitions away from fossil fuels, the region faces a period of economic restructuring marked by contraction within oil and gas and the gradual emergence of more diversified industries. Across the Regional Socio-Economic Study Area, local strategies consistently emphasise the need for innovation, diversification, and investment in emerging sectors such as renewable energy, life sciences, advanced manufacturing, and tourism. While the region benefits from substantial infrastructure and an experienced workforce, the pace of transition presents challenges for long-term economic resilience, particularly in communities with employment concentrations tied to the oil and gas supply chain (Aberdeen and Grampian Chamber of Commerce, 2024). Given these structural pressures and the region's exposure to global market volatility, the overall sensitivity of the economy within the Regional Socio-Economic Study Area is assessed as High.
Labour Market		
Regional Socio-Economic Study Area	High	The labour market across the Regional Socio-Economic Study Area is undergoing a significant period of transition, driven primarily by the long-term decline in oil and gas activity and the region's strategic shift toward low-carbon and sustainable industries. Historically, the area has benefited from high employment rates and a skilled workforce closely aligned with the needs of the energy sector. However, regional policy documents highlight growing challenges related to workforce availability, linked to the impacts of the UK's exit from the EU, demographic change, and the ageing profile of the labour force (Invest Aberdeen, n.d.). Although some parts of the study area have been less directly dependent on oil and gas, the wider regional labour market is still affected by structural changes, including the decline of traditional industries and the variable pace of economic diversification. The Regional Skills Assessment (2024) indicates that overall employment growth across the wider area is expected to remain below the national average, with contraction in energy and associated services affecting job stability, opportunities, and workforce transitions (Skills Development Scotland, 2025). In line with the sensitivity criteria, and given the combined pressures of sectoral restructuring, demographic shifts, and uneven employment opportunities, the labour market within the Regional Socio-Economic Study Area is assigned a High sensitivity rating.

Significance of Effect

18.10.29 Table 18.40 presents a summary of the combined magnitude of change and sensitivity of the receptors. The significance rating of these elements is defined using Table 18.25 Matrix Used for the Assessment of the Significance of the Effect.

Additional Mitigation and Residual Effect

18.10.30 No Additional Mitigation is considered necessary as the likely significant environmental effects identified are beneficial in EIA terms.

Table 18.40: Significance – Operation

Operation	Receptor	Magnitude of Impact	Sensitivity	Significance Rating	Significance
Regional Socio-Economics Study Area					
Scenario 1 (Commitments Scenario)	GVA	High	High	Major (Beneficial)	Significant (Beneficial)
	FTEs	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scenario 2 (Ambitions Scenario)	GVA	High	High	Major (Beneficial)	Significant (Beneficial)
	FTEs	Low	High	Moderate (Beneficial)	Significant (Beneficial)
Scotland					
Scenario 1 (Commitments Scenario)	GVA	Medium	Medium	Moderate (Beneficial)	Significant (Beneficial)
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Medium	Medium	Moderate (Beneficial)	Significant (Beneficial)
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

Decommissioning phase

Magnitude of Impact

18.10.31 In general, the scale and type of effects expected during the decommissioning stage could be expected to be similar to those anticipated to occur during the construction stage. The economic impact has been assessed across direct, indirect, and induced effects for GVA and Employment for two scenarios, with outputs presented in Table 18.41 and Table 18.42. GVA impacts are presented in real, undiscounted terms.

Table 18.41: Scenario 1 (Commitments Scenario) Decommissioning Outputs

	Scotland	UK
Direct GVA	£27 mln	£55 mln
Indirect GVA	£12 mln	£37 mln
Induced GVA	£7 mln	£22 mln
Total GVA	**£46 mln**	**£114 mln**
Direct annual. Employment	204 aFTEs	663 aFTEs
Indirect annual. Employment	132 aFTEs	656 aFTEs
Induced annual. Employment	81 aFTEs	338 aFTEs
Total Annualised Employment	**417 aFTEs**	**1,657 aFTEs**
Direct Employment	102 FTEs	332 FTEs
Indirect Employment	66 FTEs	328 FTEs
Induced Employment	40 FTEs	169 FTEs
Total Employment	**208 FTEs**	**829 FTEs**

18.10.32 Scenario 1 (Commitments Scenario) DECEX project expenditure would be expected to result in a total GVA impact of:

- £46 million in Scotland, a 0.03% increase on the baseline total of £183.5 billion GVA, considered a Negligible magnitude of change.
- £114 million in the UK, a 0.00% increase on the baseline total of £2,601.6 billion GVA, considered a Negligible magnitude of change.

18.10.33 Scenario 1 (Commitments Scenario) DECEX project expenditure would be expected to result in a total Employment impact of:

- 417 aFTEs in Scotland, equivalent to 208 FTEs, a 0.02% increase on the baseline total of 1.02 million FTEs, considered a Negligible magnitude of change.
- 1,657 aFTEs in the UK, equivalent to 829 FTEs, a 0.01% increase on the baseline total of 14.67 million FTEs, considered a Negligible magnitude of change.

Table 18.42: Scenario 2 (Ambitions Scenario) Decommissioning Outputs

	Scotland	UK
Direct GVA	£72 mln	£116 mln
Indirect GVA	£32 mln	£72 mln
Induced GVA	£20 mln	£43 mln
Total GVA	**£124 mln**	**£231 mln**
Direct annual. Employment	547 aFTEs	1,272 aFTEs
Indirect annual. Employment	354 aFTEs	1,181 aFTEs
Induced annual. Employment	216 aFTEs	623 aFTEs
Total Annualised Employment	**1,117 aFTEs**	**3,076 aFTEs**
Direct Employment	273 FTEs	636 FTEs
Indirect Employment	177 FTEs	590 FTEs
Induced Employment	108 FTEs	311 FTEs
Total Annualised Employment	**559 FTEs**	**1,538 FTEs**

18.10.34 Scenario 2 (Ambitions Scenario) DECEX project expenditure would be expected to result in a total GVA impact of:

- £124 million in Scotland, a 0.07% increase on the baseline total of £183.5 billion GVA, considered a Negligible magnitude of change.
- £231 million in the UK, a 0.01% increase on the baseline total of £2,601.6 billion GVA, considered a Negligible magnitude of change.

18.10.35 Scenario 2 (Ambitions Scenario) DECEX project expenditure would be expected to result in a total Employment impact of:

- 1,117 aFTEs in Scotland, equivalent to 559 FTEs, a 0.05% increase on the baseline total of 1.02 million FTEs, considered a Negligible magnitude of change.
- 3,076 aFTEs in the UK, equivalent to 1,538 FTEs, a 0.01% increase on the baseline total of 14.67 million FTEs, considered a Negligible magnitude of change.

<u>Sensitivity of Receptor</u>

18.10.36 The identified receptors (Regional, Scottish, and UK-wide economies and labour markets) align closely with key policy priorities at both the local level and across Scotland and the wider UK. Assigned sensitivity and these receptors is provided in Table 18.34.

<u>Significance of Effect</u>

18.10.37 Table 18.43 presents a summary of the combined magnitude of change and sensitivity of the receptors. The significance rating of these elements is defined using Table 18.25 Matrix Used for the Assessment of the Significance of the Effect.

Additional Mitigation and Residual Effect

18.10.38 No Additional Mitigation is considered necessary because the likely effect in the absence of mitigation is not significant in EIA terms.

Table 18.43: Significance - Decommissioning

Decommissioning	Receptor	Magnitude of Impact	Sensitivity	Significance Rating	Significance
Scotland					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Medium	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Medium	Minor (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Minor (Beneficial)	Not Significant
UK					
Scenario 1 (Commitments Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant
Scenario 2 (Ambitions Scenario)	GVA	Negligible	Low	Negligible (Beneficial)	Not Significant
	FTEs	Negligible	Medium	Negligible (Beneficial)	Not Significant

IMPACT 2 – CHANGES TO DEMOGRAPHICS

Construction phase

Magnitude of Impact

18.10.39 During the construction phase, employment generated by the Proposed Development has the potential to create demographic effects, particularly if job opportunities retain existing residents or attract new workers to communities around the port locations.

18.10.40 The magnitude of change would be determined by the following factors associated with construction of the Proposed Development:

- Peak employment – the largest number of the construction workforce that would be on site at the same time. The modelling suggests that under the 'Commitment' scenario, the Project could create an estimated 1,280 FTEs in Scotland during the construction phase. A higher rate of employment would result in a greater increase in population, relative to the baseline.
- Contract duration – the construction phase is expected to last for five years, though it is expected that due to the phasing of works and different activities required, not all workers would be employed for the full

duration. Longer contracts could result in workers relocating to host communities permanently and bringing families which they may be less likely to do for shorter contracts.

- Local employment – the proportion of workers expected to be sourced from the local area is currently uncertain as the port(s) have not yet been selected. However, draft local content targets will be developed for the construction phase and will be embedded into the Employer's Requirements for the appointed Contractor. If a greater proportion of the construction workforce are sourced from the local area, this would mean that fewer transient workers are required.

18.10.41 Initial analysis of the construction activities and workforce requirements undertaken by the Applicant indicates that the number of workers required onsite at ports would increase across the five-year construction period. The workforce would more than double between Y1 and Y2, then would continue to increase more gradually from Y2 to Y4, with peak construction workforce anticipated in Y4 and gradually winding down during Y5. This suggests that the extent of demographic change will vary throughout the construction period.

18.10.42 The specifics of the demographic change are uncertain at present as this would be dependent on the port selected for the construction of the Proposed Development, around which the construction workforce would reside. The magnitude of impact would be determined based on the change relative to the baseline of the port locations with regard to population size, labour market and available skills, and could range from negligible to high.

Sensitivity of Receptor

18.10.43 A community's vulnerability to a change in demographics varies significantly across host communities and is shaped by a combination of structural, economic, and social factors, including:

- Existing population size and projections (capacity to absorb an increase in population, including net migration and population growth);
- Demographic composition (influences how perceptible the change will be, including percentage of working age population and older people, cultural diversity);
- Key industries and skills (the industries that communities are reliant on, the stability of these industries and the diversity of skills in the labour market, which influences the requirement for in-migration);
- Accessibility and connectivity (whether the community is well-connected via transport hubs/roads, which influences the extent to which people can commute for employment);
- Socio-cultural (strength of social capital and whether a community's identity is tied to specific industries or traditions that may be impacted by the changes).

18.10.44 The port(s) required for the construction of the Proposed Development could be in either an urban or a rural setting in Scotland, where the characteristics of host communities and socio-economic context is likely to differ. Taking into account the factors listed above, a typical demographic area profile for an urban and rural community is provided in Table 18.44. It should be noted that these profiles are indicative, and any examples provided are for illustrative purposes only. While a broad rule of thumb can be applied, communities have unique needs and characteristics which should be considered and assessed once the port location(s) are confirmed.

Table 18.44: Rural and Urban Area Profiles

Urban Rural Classification[8]	Urban (Rest of Scotland)	Rural (Rural Scotland)
Population size and projections	Urban areas in Scotland have larger, denser populations with stable or slowly increasing growth and more diverse household types. Urban areas are more likely to experience high net migration, which may suggest that that the community already experiences population change and is used to growth and is able to adapt. For example, Aberdeen City has a net migration rate of 11.7 per 1,000 people (National Record of Scotland, 2025).	Rural areas have smaller, more dispersed populations, ageing profiles and are prone to long-term population decline or stability. Low or negative net migration may be more present rural areas, suggesting that communities may be more sensitive to demographic impacts. For example, Aberdeenshire and Angus have net migration rates of 4.2 and 5.5, respectively. These rates are approximately half the national average of 10.2 per 1000 people (National Records of Scotland, 2025) (National Records of Scotland, 2025).
Demographic composition	Urban areas in Scotland have a lower median age and a higher proportion of working-aged people and younger residents (Scottish Government, 2022)	Rural areas have the oldest population profile in Scotland. There are a higher proportion of older (65+) residents and a lower proportion of working-age population than in urban areas (Scottish Government, 2022).
Key skills and industries	Urban areas tend to have more diversified economies with broader employment bases and higher-skill industries that may reduce sensitivity to short-term demographic shifts. In urban areas, labour shortages may be less acute due to larger local labour pools and easier access to external workers. The city of Aberdeen, for example, has high employment rates in the following industries: Human Health and Social Work, Professional, Scientific, and Technical Activities and Mining and Quarrying (Skills Development Scotland, 2025).	Rural Scotland's key industries include agriculture, forestry and fishing. There is high youth employment, and growth in the renewable energy sector (Scottish Government, 2021). For example, the town of Montrose, located in the rural Electoral Ward of Angus has high employment in Industries today include food processing, engineering, pharmaceuticals and oil related industries (Scotlands Towns Partnership). Reliance on a small number of industries, may result in rural communities becoming more sensitive

[8] The Scottish Government's Urban Rural Classification can be simplified into two groups: "Rest of Scotland," comprising large and other urban areas plus accessible and remote small towns (categories 1–4), and "Rural Scotland," comprising accessible and remote rural areas (categories 5–6) (Scottish Government, 2024)

Urban Rural Classification[8]	**Urban (Rest of Scotland)**	**Rural (Rural Scotland)**
	Historic reliance on the oil and gas sector and lack of diversification has created long-term economic vulnerabilities in the city and in broader Aberdeenshire.	to short-term population fluctuations and labour shortages. Limited capacity for specialised labour often drives inward migration and may intensify demographic pressures.
Accessibility and connectivity	In urban areas, stronger transport networks and more frequent services can broaden the labour pool, providing residents with access to a wider range of jobs and reducing reliance on local employment. Better connectivity, higher service availability, and shorter, more reliable travel times allow employed individuals to commute further and more flexibly than in rural areas of Scotland. (Hobbs & Frost, 2024) Within urban communities situated close to ports, construction sites, or major infrastructure projects, workforce movements may be more readily accommodated within larger commuter networks. Therefore, high daily mobility flows may reduce the relative impact of short-term or project-related workforce changes.	Rural areas often have limited transport connectivity, this implies that residents are far more likely to work locally, as the following factors restrict access to wider labour markets; low car ownership, infrequent and delayed public transport, long travel times to major employment centres and the absence of rail links. These challenges, combined with higher levels of transport poverty, costly and unreliable bus services, and difficult interchange between transport modes, may make it harder for residents to commute beyond their immediate area, reinforcing dependence on nearby job opportunities and constraining employment choice. Rural communities situated close to ports, construction sites, or major infrastructure projects may increase local exposure to project-related workforce movements. Environmental amenities or constraints may further influence mobility patterns. (Hobbs and Frost, 2024)
Socio-cultural factors	Urban regions are typically larger, more diverse, and more mobile and tend to absorb demographic change more gradually. Their existing cultural heterogeneity, stronger integration infrastructures, and broader labour markets make population shifts less visible and less disruptive. The Commission highlights that an increasingly mobile and varied population enriches urban communities and reinforces resilience, supporting smoother social and cultural adaptation to demographic transitions. (The European Commission, 2020)	Rural areas (especially those that that may be ageing, or demographically declining), are more immediately affected by even small shifts in population. The Commission states that demographic change varies sharply across regions, but communities with shrinking or older populations feel demographic impacts more intensely due to limited diversity, tighter social structures, and reduced capacity to absorb change. These areas often face depopulation, youth out-migration, and weakened social networks, making socio-cultural shifts more pronounced (The European Commission, 2020).

18.10.45 As illustrated in Table 18.44, the most sensitive communities are small rural towns with ageing populations, constrained housing, limited labour-market flexibility, and ongoing economic transition. Conversely, urban settlements are less sensitive because larger and more demographically diverse populations, broader economic structures, and stronger transport networks provide greater capacity to accommodate short-term demographic shifts. These contexts heighten the visibility and significance of short-term demographic shifts associated with offshore wind development.

18.10.46 The sensitivity of coastal communities to demographic effects arising from the Proposed Development will depend on each chosen port location: urban communities will tend towards a lower sensitivity, while rural will have a higher sensitivity.

Significance of the Effect

18.10.47 Overall, depending on the chosen port location(s) the magnitude of change to demographics could range from negligible to high and sensitivity could range from low to very high. The effect could therefore range from **Negligible** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing demographic conditions at the chosen port location(s).

Additional Mitigation and Residual Effect

18.10.48 The residual significance of effect will depend on the final location of the construction port(s) for the Project. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

Operation phase

Magnitude of Impact

18.10.49 During the O&M phase, employment generated by the Proposed Development may cause demographic effects, particularly where new job opportunities encourage existing residents to remain or attract new workers to communities around the selected port. The scale of demographic change depends on the location of the port and the population of the associated local authority, which is not yet defined, however the expected magnitude of impact can be assessed by considering the change relative to baseline population levels for potential urban or rural port locations.

18.10.50 The port selected to host the O&M base will be the epicentre of activity during this phase. The modelling of GVA and employment impacts presented in the above section indicates that a workforce of 483 FTEs could be required to fulfil direct and indirect contracts in Scotland[9] during the operational phase of the Project.

18.10.51 Given the projected 30-year duration of the O&M phase, it is assumed that most employees will relocate on a long-term basis, accompanied by their families. Based on an assumed population multiplier of 2.35 persons[10] per job to account

[9] The MDS for demographic changes represents the maximum number of workers which will need to be employed within Scotland, assuming that none can be sourced locally.
[10] The average UK household size was 2.35 residents per household in 2024. (Office for National Statistics, 2025)

for family relocation, the 483 FTEs could represent a population increase of up to 1,135 individuals during the O&M phase.

18.10.52 While port locations for construction and marshalling are still under consideration, the Applicant has committed to an O&M port in either Aberdeenshire (including Aberdeen City) or Angus. To assess the scale of impact arising from O&M-related in-migration, the scale of the estimated population increase was calculated relative to the local population for an indicative urban port location and rural port location in this area. Aberdeen City was considered as the indicative urban location, with a population of approximately 265,080, and the port of Montrose in Angus as an indicative rural port, with a population of approximately 35,746 in key settlements in the Arbroath and Montrose TTWA[11].

18.10.53 For Aberdeen City, the estimated increase in population of 1,135 people would constitute 0.4% of the population, which is small relative to its typical annual population growth rate of 1.1%, so the scale of impact for the urban scenario is considered a low magnitude of change. In the Arbroath and Montrose TTWA, it would constitute 3.2% of the population, greatly exceeding its typical annual population growth rate of 0.1%, so the scale of impact for the rural scenario is considered a high magnitude of change.

18.10.54 The numbers presented above represent a conservative scenario for the scale of population increase concentrated in one area, as it is based on the modelled employment impacts for the Project as a whole (including employment related to onshore and offshore activities). A proportion of these employees would be associated with the onshore infrastructure and therefore may not be located close to the O&M port.

18.10.55 The O&M phase is significantly longer than the construction or decommissioning stages, so it is likely that the workforce would become more embedded within local communities, thereby diminishing the magnitude of any demographic impact over time.

Sensitivity of Receptor

18.10.56 The level of sensitivity to demographic changes cannot be defined until the port location for the O&M workforce is confirmed, as it will differ depending on if it is an urban or rural community. Based on the Rural and Urban Area Profiles presented in Table 18.44 it is considered that urban communities are likely to have low to medium sensitivity, while rural communities are likely to have high to very high sensitivity.

Significance of the Effect

18.10.57 Depending on the location of the O&M port, the magnitude of change would be low (urban) and high (rural) and the sensitivity the receptor from low to very high. The significance of the impact will therefore range from minor or moderate, to major significance. The overall impact will therefore range from not significant (**Minor**) to significant (**Moderate** or **Major**) in EIA terms. The

[11] Populations of Arbroath and Montrose derived from NOMIS small area statistics (NOMIS, 2024).

nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the area.

Additional Mitigation and Residual Effect

18.10.58 The residual significance of effect will depend on the final location of the O&M port(s) for the Proposed Development. The Applicant has committed to an O&M port within the Regional Socio-Economics Study Area, where there are several ports that could meet the requirements for O&M activity. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

Decommissioning phase

18.10.59 Demographic effects during the decommissioning phase may arise if job opportunities encourage the retention of local residents or attract new workers. However, the extent of any potential change cannot yet be assessed, as the port location(s) to be used for decommissioning remain unconfirmed. The magnitude of demographic impact will ultimately depend on the characteristics of the selected port and its associated labour pool, including population size, labour market conditions and the availability of relevant skills.

18.10.60 The decommissioning phase is expected to require a smaller workforce and over a shorter duration than the construction phase. As a result, the overall scale of demographic influence is likely to be more limited. Nevertheless, both the magnitude of impact and the sensitivity of the receptor cannot be fully evaluated until the port location(s) for decommissioning are identified.

18.10.61 Community sensitivity to demographic change varies according to urban–rural classification, with rural areas typically exhibiting higher sensitivity than urban areas. Given that host communities have not yet been identified, it is not possible to determine the likely level of sensitivity at this stage.

18.10.62 Depending on the chosen port location(s) the magnitude of change to demographics could range from negligible to high and sensitivity could range from low to very high. The effect could therefore range from **Negligible** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing demographic conditions at the chosen port location(s).

18.10.63 However, available demographic projections from the National Records of Scotland indicate an ageing population across the region and below-average population growth for all relevant local authorities, with the exception of Aberdeen City, up to 2035. Considering the relatively small workforce requirements during decommissioning, combined with ongoing net in-migration trends, these demographic patterns are unlikely to result in significant effects during this phase of the Proposed Development.

18.10.64 The residual significance of effect will depend on the final location of the decommissioning port(s) for the Project. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment

IMPACT 3 - CHANGES TO DEMAND FOR HOUSING AND LOCAL SERVICES

Construction phase

Magnitude of Impact

18.10.65 Changes in demographics have the potential to result in changes in demand for housing and local services, resulting in an increase in prices and/or displacement. These changes would occur in the areas surrounding the locations of the port(s) used for construction of the Proposed Development.

18.10.66 The magnitude of any change for housing will be determined by:

- the peak level of additional accommodation demand in each area, relative to the baseline accommodation provision; and
- any demographic changes, determined by the baseline labour supply in each area and the relative size of any transient labour population.

18.10.67 The magnitude of increased demand for housing is also used in the assessment as a proxy of potential increase in demand for local services such as education (i.e. school places for workers' children and for healthcare).

18.10.68 Local demographics affects the dependency of a community on local services; for example, communities with an older population may experience a greater demand for healthcare services, while communities with a higher proportion of families will have greater demand for education services.

18.10.69 During construction of the Proposed Development, it is expected that dependent on their role and duration of the contract, the temporary construction workforce would be likely to reside in either tourist accommodation or private rented housing. Increased demand is expected to bring benefits for tourism accommodation providers, providing year-round demand for a service that tends to be seasonal. Dependent on the chosen port location, there is also potential for the Proposed Development to have a positive impact on the rental housing market. For example, local authority total and vacant housing stock data presented in the baseline shows that in 2024, Aberdeen City had the highest amount of stock vacant across Scotland (2,300 units; 20% of Scotland's total vacant stock). Around one in five households in Aberdeen belong to the Private Rental Sector, which is higher than the national trend (Aberdeen City Council, 2025). There is an existing oversupply in the housing market and, should Aberdeen City be chosen as a port for construction for the Proposed Development, there could be a beneficial impact on the accommodation sector from an increase in demand.

18.10.70 Conversely, there could be negative impacts on the housing market and tourism accommodation sector, should the extent of demand exceed the existing supply. For residents this could result in an increase in rental prices and/or displacement, and in the longer term, gentrification of the local area. Occupancy of accommodation by the construction workforce could have a negative impact on local tourist attractions and businesses supporting the tourism economy if it prevents tourists from visiting and spending in the area.

18.10.71 Regarding demographic impacts, the change in demand for housing and local services is likely to be driven by the duration of contracts in place during construction. Temporary, short-term contracts would incur less pressure on these resources, while longer contracts could result in the workforce relocating permanently and bringing their families. With approximately 2.35 residents per household in the UK in 2024, this could mean a substantial difference in the scale of demand for housing and services, and the types of services required (e.g. school enrolment for children of workers).

18.10.72 Positive impacts are expected to arise for local businesses from increased demand for retail and hospitality services, regenerating local towns and villages in proximity to the chosen port(s). However, an increase in footfall could also place more demand on public transport and road infrastructure.

18.10.73 In addition, local roads during construction of the Proposed Development for the transport of materials for have the potential to be impacted by physical wear and tear from vehicles carrying heavy loads, such as turbine blades. Offshore wind components are extremely heavy and transporting these components from manufacturing factories to ports can result in faster deterioration of pavement and road surfaces and place additional stress on bridges and culverts. Upgrades to roads and bridges that may be required to allow transport of heavy materials will be considered as part of the Applicant's assessment of potential port locations and would be agreed with the relevant local authority.

18.10.74 Development and implementation of an Accommodation Strategy has been committed to by the Applicant for the Project which will set out how the Project will meet the demand for accommodation from its workforce. The Accommodation Strategy will include information on the following:

- Baseline on existing accommodation options (e.g., tourism accommodation, private sector rentals, vacant homes), including any seasonality in accommodation demand.
- Review of accommodation demand projections during the period of construction and other developments (housing) and projects (other energy transition projects) that might influence these.
- Project requirements, including a profile of workforce expected at site by month of construction/decommissioning (this will contribute to identify peaks and troughs in demand, and interactions with seasonality of accommodation availability).
- Information on stakeholder engagement: the partners with whom the Applicant has engaged. This is expected to include the local Council (housing and economic development teams), housing accommodation, accommodation providers and other businesses planning to build infrastructure in the same area (e.g., SSEN-T).
- Plan and expectations on accommodating workers, including expectations on how workers will be accommodated and any implications this will have on procurement/the use of a local workforce.

18.10.75 Implementation of the Accommodation Strategy is expected to reduce potential for adverse impacts on demand for housing and local services.

18.10.76 The magnitude of the change in demand for housing and local services could be negligible to major, dependent on the port(s) selected for the construction of the Proposed Development.

Sensitivity of Receptor

18.10.77 The sensitivity of any changes in housing market demand will be determined by:

- The population of the community, including the wider TTWA;
- The availability of housing or other accommodation within the community;
- The scale of the overnight tourism sector in the community;
- The ability of the housing market to adjust supply to respond to changes in demand; and
- The relative level of housing affordability in the area.

18.10.78 Any impact on services will also be determined by factors of sensitivity specific to the potentially impacted communities, including the capacity of each service in each area, and the ability of the service to adapt to changes in demand.

18.10.79 Data gathered in the baseline for the local authorities in the Regional Socio-Economics Study Area suggests that the housing and tourism accommodation market and local services have sufficient capacity to absorb a slight to substantial increase in demand. The specifics of the housing market and capacity of local services will vary depending on whether the construction port(s) is located in an urban or rural area within these local authorities. As the port location(s) are not yet chosen, a more granular analysis is not possible at this stage. However, it is considered that urban communities are likely to have low to medium sensitivity, while rural communities are likely to have high or very high sensitivity.

Significance of the Effect

18.10.80 Overall, depending on the chosen port location(s) the magnitude of change to housing and local services could range from negligible to high and sensitivity could range from low to very high. The effect could therefore range from **Negligible** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions related to housing and local services at the chosen port location(s).

Additional Mitigation and Residual Effect

18.10.81 The residual significance of effect will depend on the final location of the construction port(s) for the Project. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

Operation phase

Magnitude of Impact

18.10.82 During the O&M phase, the factors that would determine the magnitude of impact on housing and local services are the same as those outlined for the construction phase. This section discusses some of the differences between the phases.

18.10.83 During this phase, it is considered that the permanent workforce will be reliant on the private rental sector and the purchase of housing and less likely to utilise tourist accommodation. Accordingly, the tourism accommodation sector would not experience benefits from higher year-round occupancy rates. Tourist attractions and the tourism sector more broadly would be less likely to experience potential negative impacts from reduced visitor spend.

18.10.84 Housing pressures are likely to be more pronounced at the beginning of the O&M phase; however, over time it is expected that the local housing market will respond to changes in demand. It is recognised that due to the higher skilled jobs and associated higher pay within the offshore renewables sector, gentrification of local areas could be a risk. Offshore wind projects can make coastal towns newly attractive through job creation, new amenities, and infrastructure investment, bringing more affluent populations into coastal areas, causing housing costs to rise and displacing local residents.

18.10.85 The establishment of a permanent workforce and higher population during O&M would result in a consistent demand for housing and local services. Permanent residents in the local authority would be liable to pay council tax which would be spent on provision of housing, education, healthcare, and other local services. In some places, population growth can help sustain essential services, while in others it may create additional strain. The extent to which benefits to service provision can be realised would be dependent on the capacity of the local authorities and service providers to adapt to the increased demand.

18.10.86 As for changes in demographics for O&M, the magnitude of the change in demand for housing and local services could be low to high, dependent on the whether an urban or rural port location in the Regional Socio-Economics Study Area is selected.

Sensitivity of Receptor

18.10.87 Sensitivity of the two modelled scenarios (Aberdeen City and Montrose) to changes in demand for housing and local services is provided in Table 18.45.

Table 18.45: Sensitivity of two modelled O&M port locations

	Housing	**Local Services**
	Sensitivity/Justification	**Sensitivity/Justification**
Aberdeen City (urban)	Aberdeen City has the second highest level of vacant housing stock across Scotland and rental prices aligned with the Scotland average. House prices are much lower than the Scotland average. Aberdeen and Grampian have the fifth lowest hotel room occupancy rates (69.9%), out of the 12 VisitScotland areas for which data was provided. This suggests the housing and tourism accommodation market has sufficient capacity to absorb a substantial increase in demand, with the receptor therefore of Low sensitivity.	The capacity of the receptor to absorb an increase in demand is variable depending on the service. Aberdeen City is experiencing capacity issues for local services, with a higher pupil-teacher ratio than the Scotland average and pressures on key NHS Grampian KPIs, such as A&E waiting times. However, demand for police services is low and satisfaction high. The receptor is therefore of Medium to High sensitivity.
Montrose, Angus (rural)	Angus has a slightly greater vacancy rate and lower property rental prices than Scotland overall. House prices are lower than the Scotland average. Angus has the 4th lowest hotel room occupancy rates (65.7%), out of the 12 VisitScotland areas for which data was provided. This suggests the housing and tourism accommodation market has sufficient capacity to absorb a slight increase in demand, with the receptor therefore of Medium sensitivity.	The capacity of the receptor to absorb an increase in demand is variable depending on the service. Health services are performing well against NHS Board KPIs, and educational capacity is high in comparison to the Scotland average. Crime rates and police service demand are relatively high. The receptor is therefore of Medium to High sensitivity.

18.10.88 The modelled locations in Table 18.45 are provided as illustrative examples. While an urban location could generally be considered to have a lower sensitivity and rural local a higher sensitivity to change, this can be variable, and each location must be considered according to its own unique characteristics. As the port location is not yet chosen, a more granular analysis is not possible at this stage.

Significance of the Effect

18.10.89 Overall, depending on the chosen port location(s) the magnitude of change to housing and local services could range from low to high and sensitivity could range from low (urban) to high (rural). The effect could therefore range from **Minor** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions related to housing and local services at the chosen port location(s).

Additional Mitigation and Residual Effect

18.10.90 The residual significance of effect will depend on the final location of the O&M port(s) for the Project. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

Decommissioning phase

18.10.91 Impacts on housing and local services are anticipated to be similar in nature to those assessed for the construction phase. However, as there is likely to be a smaller workforce required for decommissioning, which influences demand for housing and local services, a lower magnitude of impact is expected.

18.10.92 With an O&M lifespan of 30 years, the capacity of the housing market and local services in Scotland by the time the Proposed Development is decommissioned is uncertain. As outlined in the future baseline section above, local authorities in the Regional Socio-Economic Study Area are focussed on addressing current strains on local resources, setting ambitious targets for provision of affordable housing to be and investing in services, to be delivered through housing strategies and investment plans. It is uncertain the extent to which this provision will address the long-term trend in population growth across the local authorities and the stresses that a growing aging population is placing on healthcare services.

18.10.93 Depending on the chosen port location(s) the magnitude of change to housing and local services could range from negligible to high and sensitivity could range from negligible to very high. The effect could therefore range from **Negligible** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing demographic conditions at the chosen port location(s).

18.10.94 The significance of effect will depend on the final location of the decommissioning port(s) for the Project. As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

IMPACT 4 – CHANGES TO TOURISM AND RECREATION RECEPTORS

Construction phase

<u>Magnitude of Impact</u>

18.10.95 During the construction phase, the Proposed Development may affect tourism and recreation through increased activity, temporary changes to coastal character, and construction-related disturbance. When assessing these potential impacts, changes to tourism and recreation receptors have been considered in the context of significant residual effects identified in other environmental topic assessments, particularly where these may alter users' enjoyment of recreational assets or influence visitor behaviour and perceptions of the wider area. It is recognised that a significant residual effect in another topic does not automatically translate into a significant impact on tourism and recreation; rather, the outputs of those assessments inform the evaluation of overall magnitude of change for relevant receptors. Tourism and recreation receptors are identified in Section 6, Table 18.16 and Table 18.18.

18.10.96 A description of the impacts and significant effects for tourism and recreation receptors reported in the relevant environmental topic chapters are provided in Table 18.46. Impacts on cultural heritage receptors have been scoped out of the construction phase in Volume 2, Chapter 21: Cultural Heritage.

Table 18.46 Relevant Environmental Topic Effects for Tourism and Recreation (Construction)

Relevant Environmental Chapter/Topic	Description of Impact and Embedded Mitigation	Significance of Effect
Chapter 14: Shipping and Navigation	Impact on commercial vessels: During the construction phase, vessel routing deviations could lead to delays or sailing cancelations, impacting on ferry crossings. The Navigation Risk Assessment (NRA) conducted for Shipping and Navigation (Volume 3, Technical Appendix 14.1: Navigation Risk Assessment) identified that the regular ferry services would not be impacted by the construction of the Proposed Development. Impact on small vessel activity: During the construction phase, there is potential for temporary disruption to recreational activity for vessels navigating close to shore. Any impact on marine recreation vessels is likely to be greater where there is a higher density of recreational activity, particularly in areas near the Landfall. Recreational use is also expected to vary seasonally, with peak activity occurring during the summer months when weather conditions are more favourable. Embedded mitigation measures outlined in Table 18.31 such as development of, and adherence to, a Navigational Safety and Vessel Management Plan (NSVMP) will reduce the risk of vessel collisions in the sea during construction. For example, guard vessels may be used to ensure safe passing distance between vessels.	Minor (not significant).
Chapter 16: Infrastructure and Other Users	During the construction phase the presence of offshore infrastructure, Safety Zones and/or advisory safety distances may result in the displacement of recreational craft and recreational fishing vessels from the Array Area and along the Export Cable Corridor. NtMs and Kingfisher Bulletins will be issued regularly during the construction phase, advising of the location, nature and timing of activities, ensuring that recreational activities can be planned accordingly.	Minor (not significant)
Chapter 20: Seascape, Landscape and Visual Impacts	The Proposed Development will have direct impacts on eastern views experienced by receptors within the SLVIA Study Area during the construction phase. This is due to activities including installation of wind turbines, Offshore Substation Platforms (OSPs), and vessel movements. The visual effects arising because of the construction of the Proposed Development are assessed as being short term and temporary, and of the same or lower magnitude of impact and significance as those predicted to occur during the O&M. However, the nature of the effects during construction is different due to the influence of the various construction vessels in the seascape compared to the O&M phase. The following viewpoints are anticipated to experience a Moderate (significant) effect: • Slain's Castle (Viewpoint 2) • Whinnyfold (Viewpoint 4) • Collieston (Viewpoint 5) • Torry Battery (Viewpoint 11) • Girdle Ness Lighthouse (Viewpoint 12) • Baron's Cairn (Viewpoint 13)	Minor (not significant) to Moderate (significant)

Relevant Environmental Chapter/Topic	Description of Impact and Embedded Mitigation	Significance of Effect
	• Muchalls (Viewpoint 15) • Aberdeen/Orkney Ferry (Viewpoint 8). The temporary effects arising from construction works associated with the installation of wind turbines and OSPs, specifically seascape and landscape character effects, and effects on the landscape character and special qualities of designated landscapes, are assessed as short term and temporary, occurring only for the duration of the construction phase. All other viewpoints are anticipated to experience a Minor (not significant) effect. Embedded Mitigation adopted as part of the proposed development include the development of and adherence to a Construction Method Statement, a Code of Construction Practice and a Development Specification and Layout Plan, in order to provide visual coherence within views.	

18.10.97 As shown in Table 18.46, the impacts arising from the construction phase from the related environmental topics are at minor to moderate significance, with Embedded Mitigation reducing potential effects. Visual changes associated with turbine and OSP installation are short term, reversible, and of low magnitude, resulting only in temporary effects on landscape character and quality experienced at tourism and recreation receptors. As these construction impacts are short-term and do not alter the baseline environment, overall, there are no lasting effects on tourism and recreation receptors.

18.10.98 Research focused on the construction phase of offshore wind developments, including a Biggar Economics (2020) analysis of 11 comparable case study areas in England, found no empirical link between offshore wind construction activities and negative tourism outcomes. Instead, tourism performance remained stable during construction, with no observed reductions in visitor numbers, spending, or tourism-related employment. Collectively, these findings indicate that any construction-related effects are likely to be temporary, localised, and unlikely to influence tourism (Biggar Economics, 2020).

18.10.99 Based on the conclusions of the relevant technical assessments, the following effects are identified:

- Embedded mitigation is expected to ensure that effects on marine-based recreation remain minimal and not significant.
- No disruption to commercial ferry operations is anticipated, including the Aberdeen/Orkney Ferry Link at Viewpoint 8.
- For land-based tourism and recreation, moderate (significant) effects are predicted for seven SLVIA receptors.

18.10.100 The research presented above suggests that tourists are unlikely to be deterred from visiting an attraction or an area due to offshore wind construction activities. As a result, no significant residual environmental effects are expected during construction that would impact tourism and recreation receptors in relation to the ability of visitors to enjoy tourist attractions or that would deter them from visiting the area. Therefore, the overall magnitude of impact on tourism and recreation receptors is expected to be low.

Sensitivity of Receptor

18.10.101 Tourism is a significant contributor to the Aberdeenshire and Aberdeen City economies, employing 11,800 full time equivalent jobs in 2024 (Aberdeen City Council, 2024). The regional tourism economy is resilient, with tourism in the region on an upward trajectory. The economic impact of tourism across Aberdeen City and Aberdeenshire increased by 2% between 2023 and 2024 and in 2024, the region attracted 3.7 million overnight visitors, a 16.9% increase from 2023 (Opportunity North East, 2025). Based on the current state of the Aberdeenshire and Aberdeen City tourism economy, it is considered to be robust and resilient to change and therefore is of low sensitivity.

Significance of the Effect

18.10.102 With Embedded Mitigation measures implemented, the Proposed Development is unlikely to result in significant adverse effects on tourism and recreation. The magnitude of the impact is deemed to be low and the sensitivity of the receptor is considered to be low. The effect will therefore be of negligible to minor adverse significance, which is not significant in EIA terms.

18.10.103 Considering that there could be a perceptible change in visual amenity for some tourism and recreation receptors – though appropriately managed by Embedded Mitigation measures - the higher significance rating of **Minor** adverse is deemed the most likely effect.

Additional Mitigation and Residual Effect

18.10.104 No Additional Mitigation is considered necessary because the likely effects in the absence of additional mitigation is not significant in EIA terms.

Operation phase

Magnitude of Impact

18.10.105 During the O&M phase, the Proposed Development may have an effect on tourism and recreation through increased vessel activity and changes to coastal character. Changes to tourism and recreation receptors have been considered in the context of significant residual effects identified in other environmental topic assessments, particularly where these may alter users' enjoyment of recreational assets or influence visitor behaviour and perceptions of the wider area. It is recognised that a significant residual effect in another topic does not automatically translate into a significant impact on tourism and recreation; rather, the outputs of those assessments inform the evaluation of overall magnitude of change for relevant receptors.

18.10.106 Table 18.47 provides a description of the impacts and significant effects for tourism and recreation receptors reported in the relevant environmental topic chapters.

Table 18.47: Relevant Environmental Topic Effects for Tourism and Recreation (O&M phase)

Relevant Environmental Chapter/Topic	Description of Impact and Embedded Mitigation	Significance of Effect
Volume 2, Chapter 14: Shipping and Navigation	Impact on commercial vessels: During the O&M phase, vessel routing deviations could lead to delays or sailing cancelations, impacting on ferry crossings. The full build out of the Array Area means that deviations may be required that are similar to during the latter stage of the construction phase. For construction, regular ferry services would not be impacted by the O&M phase of the Proposed Development. Impact on small vessel activity: During the O&M phase, there is potential for temporary disruption to recreational activity for vessels navigating close to shore. Any impact on marine recreation vessels is likely to be greater where there is a higher density of recreational activity, particularly in areas near the Landfall, as a result of any cable maintenance activities. Local sea users (fishing and recreational) will also be made aware of any maintenance activities undertaken related to the Proposed Development via NtMs or via the Kingfisher bulletin.	Minor (not significant).
Volume 2, Chapter 16: Infrastructure and Other Users	During the O&M phase the presence of offshore infrastructure, Safety Zones and/or advisory safety distances may displace recreational activities from the footprint of the Proposed Development and from areas subject to temporary Safety Zones and/or advisory safe passing distances, resulting in a loss of recreational resource. Recreational activity overlapping with the Offshore Export Cable routes will be able to resume during the O&M phase, and there will be no long-term exclusion of navigation within the Array Area during the lifetime of the Proposed Development. While up to 12 vessels may be on site at one time for maintenance activities, the impact and Safety Zones in place will not be constant across the Proposed Development. Impacts on recreational vessels will be localised, and the nature and timing of maintenance activities will be communicated via Notices to Mariners (NtMs) and Kingfisher Bulletins.	Minor (not significant)
Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts	The Proposed Development will have direct impacts on eastern views experienced by receptors within the SLVIA Study Area during the O&M phase. The following viewpoints are anticipated to experience a Moderate (significant) effect: • Slain's Castle (Viewpoint 2) • Whinnyfold (Viewpoint 4) • Collieston (Viewpoint 5) • Torry Battery (Viewpoint 11) • Girdle Ness Lighthouse (Viewpoint 12) • Baron's Cairn (Viewpoint 13) • Muchalls (Viewpoint 15) • Aberdeen/Orkney Ferry (Viewpoint 8). These significant effects are discussed in further detail below. All other SLVIA viewpoint receptors are assessed as experiencing a Minor (not significant) effect.	Minor (not significant) to Moderate (significant)

Relevant Environmental Chapter/Topic	Description of Impact and Embedded Mitigation	Significance of Effect
Volume 2, Chapter 21: Cultural Heritage	For cultural heritage, the Proposed Development was assessed for the potential for visual effects to impact on the appreciation of the following receptors – Dunnottar Castle, Buchanness Lighthouse, New Slains Castle, Old Slain's Castle, and Torry Battery. Though the proposed Wind Turbines would be theoretically visible from each of these receptors, the cultural significance and appreciation of the assets would be unchanged.	Minor (not significant)

18.10.107 The following coastal paths used for recreation either intersect or lie adjacent to viewpoints identified in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment as experiencing a moderate significant effect:

- Coastal Path Boddam to Curden Bay (Viewpoint 2);
- Coastal Path Whinnyfold North Section (Viewpoint 4);
- Coastal Path Collieston Village (Viewpoint 5);
- Murcar Beach Path (Viewpoint 9); and
- Coastal Path Muchalls Village - Road Link (Viewpoint 15).

18.10.108 As reported in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment (SLVIA), Slain's Castle (Viewpoint 2), Torry Battery (Viewpoint 11), Girdle Ness Lighthouse (Viewpoint 12), Baron's Cairn (Viewpoint 13) and Muchalls (Viewpoint 15) would be subject to an impact on seascape views arising from the Proposed Development, with the overall significance of effect assessed as moderate, direct, long-term and reversible (significant in EIA terms). Visitors to Slain's Castle (Viewpoint 2) are described as being highly susceptible to changes in the open coastal panorama, while recreational receptors along the Muchalls Village coastal path (Viewpoint 15) currently experience high-value open sea views, and are therefore highly sensitive. The other viewpoint receptors (Torry Battery (Viewpoint 11), Girdle Ness Lighthouse (Viewpoint 12), Baron's Cairn (Viewpoint 13)) - are considered in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment to be less sensitive to change.

18.10.109 Significant visual effects arising from the Proposed Development at Whinnyfold (Viewpoint 4) and Collieston (Viewpoint 5) are expected to primarily impact on residential receptors (with additional recreational users). While Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment reports a moderate (significant) effect, it is considered that in the context of tourism and recreation, these effects would be lesser as recreational receptors would be less sensitive to the changes as it does not form part of their everyday outlook. This is also considered to apply to the paths adjacent to these viewpoints; Coastal Path Whinnyfold North Section (Viewpoint 4) and Coastal Path Collieston Village (Viewpoint 5).

18.10.110 Tourism accommodation receptors have been identified in close proximity to SLVIA Viewpoint 12 (Girdle Ness Lighthouse): Lighthouse Cottage and Northern

Lights Apartments. These locations were investigated further in relation to the potential for a change in view to affect visitor experience or behaviour. Lighthouse Cottage is located to the south-east of the lighthouse structure and its principal outlook faces this direction; however, the view is obscured by a wall and by other existing structures. As a result, the capacity of occupants to appreciate wider seaward views is already limited, and any potential visibility of the Proposed Development would be restricted. The Northern Lights Apartments, positioned to the north-east of the lighthouse, are similarly screened by both the lighthouse itself and internal boundary walls. Consequently, the visual impact on this Lighthouse Cottage and Northern Lights Apartments would be less than the moderate significant effect assessed for Girdle Ness Lighthouse (Viewpoint 12).

18.10.111 As reported in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment, from the open deck areas of the Aberdeen–Orkney ferry, recreational passengers and workers experience a medium-value, medium-sensitivity eastern seaward panoramic view in which 40 turbines located to the south-east would form a distinguishable but distant element on the horizon within a simple, open seascape. As these receptors are only moderately susceptible to change, given their movement, focus on the coastline, and the transient nature of the view, the resulting effect of the Proposed Development is assessed in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment as moderate, direct, long term and reversible, and therefore is significant in EIA terms.

18.10.112 The above significant effects reported in Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment suggest that visitors to certain tourism and recreation receptors would experience a change in seascape views arising from O&M of the Proposed Development. The extent to which this is likely to affect tourist experience, in relation to their enjoyment of these assets, or affect their behaviours. dissuade them from visiting these locations or the general area, should also be considered.

18.10.113 A survey on public perceptions of offshore wind farm developments undertaken by the Scottish Government (2022) looked at the impacts of OWFs on tourist behaviour during the operational phase. It reported that only 5% of residents of Scotland said that they had ever deliberately avoided visiting an area where they knew that offshore Wind Turbines were visible from shore (with 88% saying they had never done this). The vast majority of respondents reported that they do not avoid having a holiday in Scotland because of visible Wind Turbines.

18.10.114 Four out of five national respondents (80%) say being able to view Wind Turbines from an OWF while on holiday in Scotland would make no difference to their choice of holiday, while 4% would be more likely to choose the holiday if they could see Wind Turbines. Around one in ten (11%) of national respondents would be less likely to choose the holiday because they could see turbines from an OWF (Scottish Government, 2022). It is noted that the research did not extend to other parts of the UK or international visitors, however it is considered unlikely that the trend in responses would be markedly different for these other geographical areas.

18.10.115 Findings from a wider review of UK and international literature and environmental statements support this, showing that predicted adverse effects on tourist numbers, visitor expenditure, and overall tourism experience are generally low and usually relate to perceived visual change, which decreases with distance from shore and typically diminishes over time. The review also considerers evidence from operational OWFs further indicates shows little to no measurable decline in tourism activity, and in some cases neutral or positive effects have been reported, including increased visitor interest associated with renewable energy infrastructure, boat tours, and visitor centres (Glasson *et al.*, 2022).

18.10.116 Taking into account the findings of the relevant environmental topic assessments, impacts on marine recreation and small vessel activity are expected to be appropriately managed throughout the O&M phase by implementation of embedded mitigation measures. No changes to cultural heritage receptors are expected that would affect appreciation of the assets. Volume 2, Chapter 20: Seascape, Landscape and Visual Impact Assessment reports some moderate significant effects on tourism and recreation receptors. However, evidence gathered from various studies indicated that the extent to which these would have an impact on tourism and recreation in the study area would be minimal. The magnitude of impact on tourism and recreation during operation is therefore considered to be low.

Sensitivity of Receptor

18.10.117 Sensitivity of the tourism economy for Aberdeenshire and Aberdeen City is assigned as low.

Significance of the Effect

18.10.118 With Embedded Mitigation measures implemented, the Proposed Development is unlikely to result in significant adverse effects on tourism and recreation. The magnitude of the impact is deemed to be low and the sensitivity of the receptor is considered to be low. The effect will therefore be of negligible to minor adverse significance, which is not significant in EIA terms. Considering that there could be a perceptible change in visual amenity for some tourism and recreation receptors, though appropriately managed by mitigation measures, the higher significance rating of **Minor** adverse is deemed the most likely effect.

Additional Mitigation and Residual Effect

18.10.119 No Additional Mitigation is considered necessary because the likely effects in the absence of additional mitigation is not significant in EIA terms.

Decommissioning phase

18.10.120 The effects reported from the environmental topics that inform the assessment of changes to tourism and recreation for decommissioning are anticipated to be similar as for construction. This is considered to be a conservative approach as decommissioning would generally involve less plant, a smaller construction workforce, and a shorter duration of activity.

18.10.121 The Aberdeenshire and Aberdeen City tourism economy is resilient and strategies, such as 'Destination Aberdeen & Aberdeenshire: A Framework for

Growth 2022-2030', are in place to ensure sustainable future growth in the sector.

18.10.122 Overall, the magnitude of the impact is deemed to be negligible and the sensitivity of the receptor is considered to be low. The effect will therefore be of negligible to minor adverse significance, which is not significant in EIA terms. Considering that there could be a perceptible change in visual amenity for some tourism and recreation receptors – though appropriately managed by mitigation measures - the higher significance rating of **Minor** adverse is deemed the most likely effect.

Additional Mitigation and Residual Effect

18.10.123 No Additional Mitigation is considered necessary because the likely effects in the absence of additional mitigation is not significant in EIA terms.

IMPACT 5 - SOCIO-CULTURAL IMPACTS

Construction phase

Magnitude of Impact

18.10.124 The Proposed Development may lead to socio-cultural impacts, including potential disruption to community cohesion, changing perceptions of the local area, wellbeing, and the generation of local employment.

18.10.125 While the export cable corridor extends north towards Gourdon, Landfall will be over 1 km south of the village. Johnshaven is situated further south of the Export Cable Corridor, over 2 km from Landfall. Due to the distance, it is considered that these communities in the Local Socio-Economics Study Area are unlikely to experience disruptive effects arising from the construction phase of the Proposed Development.

18.10.126 During this phase, socio-cultural impacts are more likely to arise on communities living close to the potential port locations for construction. The Proposed Development will be built out over a period of up to five years including site preparation; however the activities will not occur continuously throughout the five-year period, rather, the programme indicates the period within which these activities could occur. Disruption caused by construction activities will be temporary and short-term, and with Embedded Mitigation measures outlined in the CMS and CoCP. The workforce will follow best practice requirements and a Code of Conduct in and around the site and within local communities, implemented as part of the CMS. While the locations of potential construction ports have not yet been confirmed, it is anticipated that appropriate traffic management measures would be implemented, where required, to manage construction-related traffic and reduce disruption in these areas.

18.10.127 As discussed under 'Impact 2 - Changes to demographics' and 'Impact 3 Changes to housing and local services', the significance of effects could range from minor to major, depending on as the construction port locations selected for the Proposed Development. It is acknowledged that communities often have concerns relating to the demand for housing and services arising from a transient workforce. The Applicant has committed to the preparation of an

Accommodation Strategy to determine how the project will meet the demand for accommodation from its workforce, providing clarity on accommodation for workers and avoiding disruption to local accommodation.

18.10.128 The Proposed Development would provide opportunities during construction for employment in high-quality, skilled jobs that are future-ready; these roles are likely to be attractive to employees seeking diversification from the oil and gas sector, and who may be experiencing job insecurity due to the decline of the industry. Insecure and precarious work is associated with poorer health outcomes and particularly worse mental health (Commission for Healthier Working Lives, 2024). Accordingly, improving job security could result in better physical and mental wellbeing outcomes for people living in the local area who are able to transition from oil and gas to the renewables sector.

18.10.129 Analysis of employment impacts undertaken for the Commitment scenario indicates that approximately 725 FTEs could be directly supported by the Project in Scotland during the construction phase. Opportunities will also create demand for a broader range of support roles across the supply chain, enabling indirect employment benefits for workers in adjacent industries and supporting businesses. A total of 368 FTEs across Scotland are anticipated to be supported indirectly through the supply of goods and services to the Project and its contractors. This includes potential benefits for local small and medium-sized enterprises, particularly within sectors such as retail, food and drink, accommodation, transport, and other service industries, driven by increased demand associated with the temporary influx of construction workers and ongoing port-related activity. This could have a positive impact on local economies and community wellbeing.

18.10.130 It is recognised that in coastal communities, community identity may be tied to specific occupations or traditions, such as fishing and fishing-dependent businesses (repair yards, processors, wholesalers). Disruption and/or displacement of fishing activities due to access restrictions in place during the construction phase could have an adverse impact on livelihoods and socio-cultural identities in coastal fishing communities.

18.10.131 Community wellbeing within coastal areas is closely linked to the environmental, social, and cultural values associated with the coast and marine environment. A study on subjective wellbeing associated with cultural ecosystem services (Bryce, 2016) identified multiple cultural benefits derived from marine areas, including engagement and interaction with nature; place identity (e.g. sense of belonging); therapeutic value (e.g. clearing head, feeling healthy, sense of freedom); and social bonding (e.g. spending time with others) (State of the Coast, 2025). Evidence from State of the Coast (2025) highlights that coastal community wellbeing is strongly mediated through opportunities for engagement with the natural environment, the maintenance of place identity, and the therapeutic, and social benefits derived from interaction with coastal landscapes. The Proposed Development is not anticipated to preclude these forms of engagement, nor to materially diminish the capacity of local communities to access or derive wellbeing benefits from the coast. Although temporary construction activities may result in changes in amenity due to construction traffic or visual effects, these effects would be of limited duration and subject to Embedded Mitigation measures set out within the CMS and CoCP.

18.10.132 In the longer term, the anticipated climate mitigation benefits of offshore wind generation, particularly reductions in greenhouse gas emissions and associated contributions to ecosystem resilience, may indirectly support continued positive engagement with nature by helping to safeguard the environmental qualities upon which community wellbeing dimensions depend.

18.10.133 There are a range of positive and negative effects identified above that would primarily affect communities based around chosen construction ports in relation to the presence of a transient workforce; disruption arising from construction activity at ports; changes to amenity from visual impacts; impact on community wellbeing arising from changes to traditional livelihoods and disruption of access to the coastal and marine environment. Findings for the assessments of changes to demographics and demand for housing and local services suggest that socio-cultural impacts would vary depending on whether the chosen construction port is in a rural or urban setting.

Sensitivity of Receptor

18.10.134 Coastal communities are facing increased socio-cultural pressures, linked to long-term economic change, especially the decline of the oil and gas sector, as well as growing risks from coastal erosion and flooding. Harbours, beaches, coastal paths, and marine infrastructure are central to local identity, employment, everyday life, and community wellbeing. In several communities, these pressures have contributed to out-migration, challenges in the local labour market, and increasing strain on coastal infrastructure.

18.10.135 Port towns such as Montrose experience similar inequalities, particularly in relation to employment and health. Overall, while wellbeing across the region remains relatively high, the combination of economic transition, coastal vulnerability, and existing deprivation means that coastal and port communities are more socio-culturally sensitive than other parts of the study area.

18.10.136 As the construction port(s) are not yet known, the sensitivity of communities around these areas cannot be determined; though it is anticipated that rural coastal communities would be of high to very high sensitivity and urban coastal communities would be of low to medium sensitivity.

Significance of the Effect

18.10.137 Overall, the magnitude of socio-cultural change could range from low for the urban scenario to high for the rural scenario. The sensitivity of communities is also considered to range from low to very high. Due to the complex nature of communities and their needs, it is considered unlikely that a negligible sensitivity rating would apply. The effect will therefore range from **Minor** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the community and perceptions of the Proposed Development.

Additional Mitigation and Residual Effect

18.10.138 In alignment with the recommendations outlined in the National Assessment of Socio-Economic Issues and Opportunities for Offshore Wind Scoping Report (BiGGAR Economics, 2025), the Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations.

18.10.139 Additionally, as outlined in the monitoring commitments (Table 18.2), once port location(s) is known, the Applicant will review the assessment.

18.10.140 The overall significance of socio-cultural effects is likely to reduce, however until port(s) have been selected and any further measures have been developed to support communities, it is not possible to ascertain the extent of the reduction and the residual significance of the effect.

Operation phase

Magnitude of Impact

18.10.141 During the O&M phase, the Proposed Development may cause socio-cultural effects relating to community cohesion, perceptions of the local area, community wellbeing, and local employment.

18.10.142 O&M activities at port locations would be periodic, lower in intensity than construction, and undertaken by a smaller workforce operating primarily offshore and from port facilities. O&M activities associated with the Proposed Development would typically include scheduled inspections, monitoring, routine servicing of turbines and offshore electrical infrastructure, and occasional maintenance works.

18.10.143 Communities living closest to Landfall (Gourdon and Johnshaven) are not anticipated to be affected by O&M activities for the Proposed Development. Operational activities would not restrict access to the coast or marine environment and would not result in sustained changes to amenity for local residents. Any intermittent visual effects associated with offshore maintenance activities are expected to be limited in duration and unlikely to affect the ability of communities to engage with coastal environments for recreation, health, or social purposes. These activities are unlikely to have a perceptible effect on the existing working coastal environment and to give rise to regular disturbance for local communities living close to ports.

18.10.144 The O&M workforce is expected to be relatively stable over the operational life of the Project. Changes associated with demographics and demand for housing and local services around potential port locations associated with the O&M workforce are considered above, with the significance of effects ranging from minor to major, depending on whether rural or urban locations are selected. These changes could have an adverse effect on local people, who may feel crowded out by new residents or that the character of their area is changing too quickly. Conversely, an increase in population could strengthen the community by revitalising declining areas and increasing participation in local events.

18.10.145 The O&M phase would support a number of long-term, skilled jobs in the Regional Socio-Economic Study Area, including roles related to Wind Turbine maintenance, marine operations, and management of the development. This could be of particular benefit to people seeking to transition out of employment in the oil and gas sector; in Aberdeen City and Aberdeenshire, as of 2021, direct employment in oil and gas had already declined by nearly 33% since 2015 (Just Transition Commission, 2025).

18.10.146 The local area may continue to experience indirect socio-economic effects through the long-term presence of O&M teams and ongoing demand for marine services, accommodation, and supply-chain support. This could have longer-term benefits through the reshaping of local industries around the green energy transition. There may be indirect benefits as a result of this, for example increased economic activity is expected to support local businesses and services in port towns and coastal communities in the Regional Socio-Economic Study Area, contributing to economic stability, skills development, and the resilience of local economies over the operational life of the Project. Findings from a study undertaken by the Research Studies Association (2023) found a positive effect of offshore wind energy investment on the local economy of remote deprived communities in the UK. The study reported that increasing installed capacity by the size of an average offshore wind farm generates a 10% growth in employment and a 20% increase in firm entry in industries operating nearby the infrastructure servicing these farms (Vanino, 2023).

18.10.147 It is recognised that in some coastal communities, community identity may be tied to specific occupations or traditions, such fishing and fishing-dependent businesses. Potential impacts for fishers during the O&M phase are expected to be less than during construction and will be appropriately managed by the Embedded Mitigation measures outlined in Table 18.31.

18.10.148 In the longer term, the operational phase of the Proposed Development would contribute to climate change mitigation through the generation of renewable energy. These benefits may indirectly support community wellbeing by helping to protect coastal and marine environments from climate-related impacts, which are closely linked to local identity, quality of life, and wellbeing in coastal communities.

18.10.149 Recent evidence from the Scottish Government's 2022 survey on public perceptions of offshore wind developments highlights a wide range of socio-cultural factors valued by Scottish communities, including economic stability, sustainable local industries and services, opportunities for recreation and social interaction, preservation of local identity and heritage, connections to nature and landscape, and trust in decision-making systems. Despite these sensitivities, support for offshore wind remains consistently strong, with 80% of national respondents and 83% of coastal respondents expressing approval, and over 89% recognising the wider social and economic value of the sector. The same study found that communities living near existing offshore wind farms generally report more positive than negative impacts, with 25% noting improvements in quality of life and 66% identifying economic benefits, while only a small proportion (4%) reported negative effects. Although around 34% of residents expressed concerns about changes to traditional coastal character, these views did not significantly affect the overall trend of broad public support.

18.10.150 This survey shows that communities living near existing OWF report more positive than negative effects, with only a small minority reporting adverse impacts on quality of life (Scottish Government, 2022). Therefore, during the O&M phase, the move to lower-intensity operations is likely to reduce uncertainty and support a return to normal conditions within coastal and port communities. Evidence from operational offshore wind developments indicates that communities tend to adapt over time, particularly where ongoing activity does not disrupt daily life.

18.10.151 In summary, during the O&M phase, adverse socio-cultural effects could arise due to disruption related to O&M activities; a change in demographics and demand for housing and local services, affecting the character of the community; changes to local industries impacting on community identity; and amenity effects related to the visual impact of the Proposed Development. However, there is potential for population growth associated with the O&M phase to increase participation in the community, in local groups and events, thereby improving social cohesion. Additionally, ongoing employment and indirect spend associated with O&M activities are expected to bring economic benefits to local businesses and services, boosting community vitality and improving quality of life. Overall, the magnitude of impact is considered to be low to medium for urban communities and high for rural communities.

Sensitivity of Receptor

18.10.152 As described in Section 18.6, within the Regional Socio-Economic Study Area, levels of socio-economic deprivation as measured by the SIMD are varied across the local authorities. Aberdeen City and Angus experience mid-range levels of deprivation, and Aberdeenshire experiences low levels of deprivation; though deprivation is increasing across all three local authorities. The local authorities in the Regional Socio-Economic Study Area have concerns related to the decline of the oil and gas industry and associated economic challenges, while the coastal communities are facing threats to their livelihoods from impacts associated with climate change, such as coastal erosion and flooding.

18.10.153 As the O&M port(s) are not yet known, the sensitivity of communities around these areas cannot be determined; though it is anticipated that rural coastal communities would be of high to very high sensitivity and urban coastal communities would be of low to medium sensitivity.

Significance of the Effect

18.10.154 The magnitude of socio-cultural impacts would range from low to high and the sensitivity of the receptor would vary from low to very high depending on the location of the port. The effect will therefore be of **Minor** to **Major** significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the community and perceptions of the Proposed Development.

Additional Mitigation and Residual Effect

18.10.155 As for the construction phase, the Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

18.10.156 Additionally, as outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

18.10.157 The overall significance of socio-cultural impacts is likely to reduce, however until port(s) have been selected and any further measures have been developed to support communities, it is not possible to ascertain the extent of the reduction and the residual significance of the effect.

Decommissioning Phase

18.10.158 The decommissioning phase is expected to involve a reduced workforce and take place over a shorter duration compared with the construction phase. Social cohesion and identity of port towns and surrounding areas could be impacted by changes to demographics and demand for housing and local services arising from the decommissioning workforce, and changes to the local industries on which livelihoods may be reliant, such as fishing. However, these effects are anticipated to be of a lesser extent than for construction.

18.10.159 While visual or recreational disruption associated with the proposed development may be experienced by nearby communities, disruption is expected to be temporary and mitigated by Embedded Mitigation measures outlined in the CEMP and TMP.

18.10.160 As the decommissioning port(s) are not yet known, the sensitivity of communities around these areas cannot be determined; though it is anticipated that rural coastal communities would be of high to very high sensitivity and urban coastal communities would be of low to medium sensitivity.

18.10.161 Overall, the magnitude of socio-cultural change could range from low for the urban scenario to high for the rural scenario. The sensitivity of communities is also considered to range from low to very high. Due to the complex nature of communities and their needs, it is considered unlikely that a negligible sensitivity rating would apply. The effect will therefore range from Minor to Major adverse significance, which ranges from not significant to significant in EIA terms. The nature of the effect (i.e. beneficial or adverse) would depend on the existing conditions within the community and perceptions of the Proposed Development.

18.10.162 As for the construction and O&M phases, the Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

18.10.163 The overall significance of socio-cultural impacts is likely to reduce, however until ports have been selected and any further measures have been developed to support communities, it is not possible to ascertain the extent of the reduction and the residual significance of the effect.

18.11 Inter-Related Effects

18.11.1 A description of the likely inter-related effects arising from the Proposed Development on Socio-Economics, Tourism and Recreation is provided in Volume 2, Chapter 23: Inter-Related Effects.

18.11.2 In relation to project-wide inter-related impacts, as assessed in Volume 2, Chapter 13: Commercial Fisheries there is potential for impacts on commercial fishing activities, which could result in a reduced value of fish caught and potential associated downstream impacts, for example on fish processors. This is relevant for socio-economics, as there could be an adverse impact on GVA and employment, should this have a discernible impact on the fishing industry. Additionally, adverse wellbeing impacts for local fishermen could arise should their livelihoods be impacted. However, as assessed in Volume 2, Chapter 13: Commercial Fisheries, with the Embedded Mitigation in place, including commitment to Disruption Agreements where appropriate, the Proposed Development is expected to result in effects of Negligible or Minor (adverse) significance, which is not significant. No synergistic impacts are expected on GVA and employment as a result.

18.11.3 In relation to receptor-led inter-related effects, tourism and recreation receptors and associated impacts have been identified with consideration of the following related environmental assessments:

- Volume 2, Chapter 14: Shipping and Navigation;
- Volume 2, Chapter 16: Infrastructure and Other Users
- Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts; and
- Volume 2, Chapter 21: Cultural Heritage.

18.11.4 As the project-wide effects and inter-related receptors identified from these chapters have already been assessed in Section 18.10, additional assessment of inter-related effects for socio-economics, tourism and recreation is not considered necessary.

18.12 Cumulative Effects Assessment

Methodology

18.12.1 The Cumulative Effects Assessment (CEA) assesses the impact associated with the Proposed Development together with other relevant projects and activities. Cumulative effects are defined as the effect of the Proposed Development in combination with the effects from several different projects, on the same receptor or resource. Further details on CEA methodology are provided in Volume 1, Chapter 4: EIA Methodology.

18.12.2 The combined effects of the Proposed Development with the Onshore Infrastructure (the Project) are considered cumulatively in Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore).

18.12.3 The projects selected as relevant to the CEA for the Proposed Development presented within this chapter are based upon the results of a screening exercise. Volume 3, Technical Appendix 4.4: Cumulative Effects Assessment – Screening provides further information in relation to other projects and how this information is obtained and applied to the assessment. Each project 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.

18.12.4 In undertaking the CEA for the Proposed Development, it is important to bear in mind that other projects 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 the Proposed Development. Therefore, a tiered approach has be adopted. This provides a framework for placing relative weight upon the potential for each project to be included in the CEA to ultimately be realised, based upon the project's current stage of maturity and certainty in the projects' parameters. The tiered approach which will be utilised within the Proposed Development CEA employs the following tiers:

- Tier 1 – The onshore elements of the Project (already considered within the assessment of GVA and employment effects);
- Tier 2 – Projects that have an application submitted, are consented, under construction or operational to the extent not already captured with the baseline;
- Tier 3 – Projects which have submitted a scoping report and/or have received a scoping opinion; and
- Tier 4 – Reasonably foreseeable projects including those with Crown Estate Scotland option or lease agreements.

18.12.5 The assessment of cumulative effects arising from the Onshore Infrastructure (Tier 1) inherently considers all projects included within the CEA presented in Volume 1, Chapter 16: Socio-Economics, Tourism and Recreation, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

18.12.6 The CEA for socio-economics, tourism and recreation considers the projects screened in for assessment for the related environmental topics, as these have the potential to have cumulative effects on tourism and recreational receptors:

- Volume 2, Chapter 14: Shipping and Navigation;
- Volume 2, Chapter 16: Infrastructure and Other Users; and
- Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts.

18.12.7 The screening exercise for Volume 2, Chapter 21: Cultural Heritage concluded that no projects would be scoped into the CEA, therefore no projects from this assessment were carried through to the CEA for socio-economics, tourism and recreation.

18.12.8 The projects screened into the CEA for Volume 2, Chapter 13: Commercial Fisheries was considered in relation to cumulative effects on GVA, employment and supply chain, and socio-cultural impacts.

18.12.9 Accordingly, the following figures are referenced, which indicate the location of the screened in projects for those assessments:

- Figure 13:6: Other Projects Screened into the CEA for Commercial Fisheries;
- Figure 14.2: Other Projects Screened into the CEA for Shipping and Navigation;
- Figure 16.10: Other Projects Screened into the CEA for Infrastructure and Other Users; and
- Figure 20.9: Other Projects Screened into the Cumulative Effects Assessment for SLVIA

18.12.10 Additional projects have been screened in for the potential for cumulative impacts on GVA and employment, demographics, changes in demand to housing and local services, and socio-cultural impacts, resulting from overlapping construction, O&M and/or decommissioning phases.

18.12.11 GVA, employment and supply chain effects consider all OWF projects across Scotland, the UK, and Belgium, Netherlands, Germany, France and Denmark with construction, O&M, and decommissioning phases that overlap with the Proposed Development. This is due to the specialist nature of offshore wind infrastructure, and the materials and the skills required, which could result in heightened demand for resources both regionally, nationally and in the EU. OWF projects currently in operation that will overlap with the Proposed Development have been considered in the development of existing supply chain commitments but are likely to have an ongoing impact on supply chain requirements and are therefore considered relevant to the CEA.

18.12.12 Demographics, demand on housing and local services, and socio-cultural impacts considers OWF projects, in addition to other infrastructure projects occurring in Scotland, with construction, O&M, and decommissioning phases that overlap with the Proposed Development. This is because these effects are more localised and are primarily related to the influx of the workforce associated with the various phases and activities around port towns.

18.12.13 The specific projects scoped into the CEA for socio-economics, tourism and recreation, are outlined in Table 18.48.

18.12.14 It should be noted that both Spiorad na Mara and Bellrock OWFs are now Tier 2 projects as of March 2026 and April 2026 respectively, as both projects are now in the planning phase with their EIA Reports submitted. However, according to the CEA methodology described in Volume 1, Chapter 4: Environmental Impact Assessment Methodology, these projects have remained assessed as Tier 3 projects within the CEA presented here for socio-economics.

Table 18.48: Projects scoped into CEA for Socio-Economics, Tourism and Recreation

Project	Status	Distance from Array Area (km)	Description of Project	Dates of Construction (If Applicable)	Dates of Operation (If Applicable)	Overlap with the Proposed Development
Tier 1						
Bowdun Onshore Infrastructure	Application submitted but not yet determined	0.00	The Onshore Infrastructure associated with the Project.	2031-2036	2036-2066	The Onshore Infrastructure and Offshore Infrastructure together form the overall Project and are therefore inter-dependent.
Tier 2						
Offshore Wind Projects and Associated Cables						
Aspen OWF	Application submitted but not yet determined	88.37	Aspen OWF is proposed for up to 1,000 MW and up to 72 Wind Turbines.	2027-2031	2032 - 2056	Yes. Potential for construction phase or O&M phase to interact with the construction or O&M phases of the Proposed Development.
Ayre OWF	Application submitted but not yet determined	192.87	Ayre OWF is proposed for up to 67 Wind Turbines at a capacity of 1,000 MW.	2030-2034	2035-2059	
Berwick Bank Wind Farm OWF	Consented	46.53	Proposed development comprised of maximum 307 Wind Turbines with a capacity of up to 4,100 MW.	2027 – 2032	2033 – 2067	
Berwick Bank OFTO	Application submitted but not yet determined	46.53	Berwick Bank transmission is proposed for up to four cables.	2026 – 2029	2030 - Unknown	
Cenos OWF	Application submitted but not yet determined	149.39	Cenos OWF is proposed for up to 95 Wind Turbines at a capacity of 1,350 MW.	2030-2034	2034 onwards	
Culzean Floating Offshore Wine Turbine Pilot Project	Consented	185.50	Culzean Floating Offshore Wind Turbine Pilot Project is proposed for up to 3 MW.	2026	2027-2035	
Forthwind Demonstration Project	Consented	85.53	Forthwind Limited secured a Marine Licence and Section 36 Consent from Marine Scotland in March 2023 for a single Wind Turbine with an intended operational period of 25 years. Forthwind Limited submitted a Section 36 Consent Variation in February 2024 to modify the Wind Turbine parameters. Forthwind's Contracts for Difference (CfD) was terminated in April 2024. Construction programme and O&M period unknown.	unknown	unknown	
Green Volt OWF	Consented	92.16	Green Volt OWF is proposed for up to 35 Wind Turbines at a capacity of 560 MW.	2027-2029	2030-2054	
Inch Cape OWF	Under Construction	56.03	Inch Cape OWF is consented for up to 72 Wind Turbines with a capacity of 1,100 MW	2024-2026	2027 – 2051	
Inch Cape OFTO	Under Construction	65.87	2 export cables with a capacity of 220 kV approximately 85 km in length between the landfall point at Cockenzie in East Lothian and the development area.	2024 - 2026	2027 - 2040	
MarramWind OWF	Application submitted but not yet determined	112.04	Marram OWF is proposed for up to 150 Wind Turbines at a capacity of 3,000 MW.	2030 - 2040	2041 - 2065	
Muir Mhor OWF	Application submitted but not yet determined	52.50	Proposed for up to 67 Wind Turbines at a capacity of 798 MW.	2027 – 2030	2031 – 2055	
Neart Na Gaoithe OWF	Operational	80.49	Neart na Gaoithe OWF is consented for up to 54 Wind Turbines at a capacity of 450 MW.	N/A	2025-2049	
Ossian OWF	Application submitted but not yet determined	25.36	Proposed development comprised of up to 265 floating Wind Turbines with a capacity of 3,600 MW.	2031 – 2038	2039 - 2066	
Salamander OWF	Consented	56.68	Salamander OWF has a proposed capacity of up to 100 MW.	2027 – 2029	2030 – 2054	

Project	Status	Distance from Array Area (km)	Description of Project	Dates of Construction (If Applicable)	Dates of Operation (If Applicable)	Overlap with the Proposed Development
Seagreen Phase 1 OWF	Operational	27.87	Seagreen 1 OWF consists of up to 114 Wind Turbines at a capacity of 1,075 MW.	N/A	2023-2047	
Seagreen 1A Project	Consented	36.60	Seagreen 1A is made up of the 36 remaining wind turbines consented as part of the Seagreen 1 Offshore Wind Farm.	2029-2032	2033 - 2057	
West of Orkney OWF	Consented	251.46	West of Orkney Wind Farm of up to 125 Wind Turbines at a capacity of 2,000 MW.	2028-2031	2032-2056	
Other OWFs and associated export cable corridors in the North Sea, English Channel, Celtic Sea and Irish Sea	Various OWFs and associated export cable corridors either under construction or in operation, with potential for an overlap in cumulative impacts associated with construction activities and the O&M phase. Volume 2, Chapter 13: Commercial Fisheries reports potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise. For North Sea OWFs located off the North East coast of Scotland, there is potential for cumulative impacts on demographics, demand on housing and local services, and socio-cultural impacts.					
Other North Sea OWFs and associated export cable corridors off Belgium, Netherlands, Germany, France and Denmark	Various OWFs and associated export cable corridors either under construction or in operation, with potential for an overlap in cumulative impacts associated with construction activities and the O&M phase. Volume 2, Chapter 13: Commercial Fisheries reports potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise.					
Cables and Pipelines						
Eastern Green Link 2 subsea cable	Under construction	0.00	2 GW subsea cable connecting Peterhead in Aberdeenshire and Drax in North Yorkshire. Onshore construction commenced in 2025. Offshore construction begins in 2027.	2025 - 2028	2029 onwards	Yes. Potential for O&M phase to interact with the construction or O&M phases of the Proposed Development.
Spittal to Peterhead High Voltage Direct Current (HVDC) Link Project	Under construction	62.49	Construction of a new 172 km, 2 GW, 525 kV subsea HVDC electricity transmission link in the Moray Firth. Marine licence granted 18 November 2025. Enabling works	2026 - 2029	2030 onwards	
Tier 3						
Coastal Projects						
Fraserburgh Harbour Development	Pre-Application	78.98	Proposed works to existing harbour improvement and construction of New South Harbour. Proposed works include relocation of existing south breakwater box berth, dredging and widening of the entrance of two harbours, a jetty and a pier, installation of pontoons and dredging the existing channel, extension of breakwater, installation of new breakwater, dredging and installation of new dry dock.	2028 - 2032	2033 onwards	Yes. Potential for construction and O&M phase to interact with the construction or O&M phases of the Proposed Development.
Offshore Wind Projects and Associated Cables						
Morven North OWF	Pre-Application	10.03	Morven North Offshore Wind Array Project is proposed for up to 96 wind turbines at a capacity of 1,500 MW.	2030 - 2036	2037 – 2061	Yes. Potential for construction phase or operational phase to interact with the construction or operational phases of the Proposed Development.
Morven South OWF	Pre-Application	43.61	Morven South Offshore Wind Array Project is proposed for up to 95 wind turbines at a capacity of 1,500 MW.	2030 – 2036	2037 – 2061	
Morven Hawthorn Pit Grid Connection Project	Pre-Application	1.81	Consists of the onshore and offshore infrastructure associated with the Morven OWF. Up to 6 export cables with a capacity of 525 kV.	2029 - 2032	2033 onwards	
Havbredey OWF and Export Cable Corridor	Pre-Application	303.20	Havbredey OWF is proposed for up to 110 Wind Turbines at a capacity of 1,500 MW.	2032 – 2035	2036 onwards	
Bellrock OWF	Pre-Application	62.23	Bellrock OWF is proposed for a capacity of 1,800 MW.	2027-2030	2031 - 2055	

Project	Status	Distance from Array Area (km)	Description of Project	Dates of Construction (If Applicable)	Dates of Operation (If Applicable)	Overlap with the Proposed Development
Machair Wind Offshore Wind Farm	Pre-Application	319.51	MachairWind OWF is proposed for up to 147 Wind Turbines at a capacity of 2,000 MW.	2029 - 2032	2033 - 2057	
Talisk OWF and Export Cable Corridor	Pre-Application	346.58	Talisk OWF is proposed for up to 33 Wind Turbines at a capacity of 495 MW.	2029-2031	2032 o- 2056	
Spiorad na Mara OWF and Export Cable Corridor	Pre-Application	345.58	Comprising up to 60 wind turbines, with an approximate capacity of 900 MW.	2028-2031	2032 - 2056	
Stromar OWF and Export Cable Corridor	Pre-Application	153.38	Stromar is proposed for up to 1,500 MW capacity.	2028-2032	2033 - 2057 onwards	
Arven OWF and Export Cable Corridor	Pre-Application	352.16	Arven OWF is proposed for a capacity of 2,300 MW.	2030-2034	2035 - 2059	
Stoura OWF and Export Cable Corridor	Pre-Application	381.15	Stoura OWF is proposed for up to 40 wind turbines at a capacity of 500 MW.	2031-2035	2036 - 2070	
Ossian Transmission Infrastructure	Pre-Application	25.28	Up to 6 export cables with a maximum total length of offshore cable route of 509 km. Anticipated application submission in the latter half of 2026. Operational lifetime 35 years.	2030 - 2033	2034 - 2068	
Other OWFs and associated export cable corridors in the North Sea, English Channel, Celtic Sea and Irish Sea	Various OWFs at scoping stage, with potential for an overlap in cumulative impacts associated with construction activities and the operation phase. Chapter 13 (Commercial Fisheries) reports potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise. For North Sea OWFs located off the North East coast of Scotland, there potential for cumulative impacts on demographics, demand on housing and local services, and socio-cultural impacts.					
Other North Sea OWFs and associated export cable corridors off Belgium, Netherlands, Germany, France and Denmark	Various OWFs at scoping stage, with potential for an overlap in cumulative impacts associated with construction activities and the operation phase. Chapter 13 (Commercial Fisheries) reports potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise.					
Cables and Pipelines						
Eastern Green Link (EGL) 3 subsea cable	Pre application	6.28	The project comprises a 2 GW system linking Aberdeenshire in Scotland and Lincolnshire in England. Approximately 575 km of subsea HVDC cable from Lincolnshire to a proposed Landfall at Sandford Bay, Peterhead	2028-2030	2031 onwards	Yes. Potential for construction phase or operational phase to interact with the construction or operational phases of the Proposed Development.
EGL 4 subsea cable	Pre application	94.96	The project comprises a 2 GW system linking Lincolnshire in England and Fife in Scotland. Approximately 525 km of subsea HVDC cable from Lincolnshire to the Fife landfall either at Kinghorn or Largo Bay	2027-2030	2031 onwards	
Central North Sea Electrification (CNSE) Project	Pre application	36.00	Electrification of existing oil and gas infrastructure in the central North Sea. The infrastructure includes an onshore convertor station, an offshore convertor station, 66 kV offshore cabling connecting CNSE assets, 80 kV cabling to Landfall, and 80 kV cabling from Landfall to the onshore convertor station.	2027-2028	2029 onwards	
Tier 4						
Offshore Wind Projects and Associated Cables						
Flora Floating OWF	Pre-Planning	46.83	INTOG site 4 is proposed for up to 50 MW.	Unknown	Unknown	Yes.

Project	Status	Distance from Array Area (km)	Description of Project	Dates of Construction (If Applicable)	Dates of Operation (If Applicable)	Overlap with the Proposed Development
						Potential for construction phase or operational phase to interact with construction or operational phases of the Proposed Development.
Other OWFs and associated export cable corridors in the North Sea, English Channel, Celtic Sea and Irish Sea	Various OWFs at leasing/concept/early planning stage with potential for an overlap in cumulative impacts associated with construction activities and the O&M phase. Chapter 13 (Commercial Fisheries) reports potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise. For North Sea OWFs located off the North East coast of Scotland, there potential for cumulative impacts on demographics, demand on housing and local services, and socio-cultural impacts.					
Other North Sea OWFs and associated export cable corridors off Belgium, Netherlands, Germany, France and Denmark	Various OWFs at leasing/concept/early planning stage with potential for an overlap in cumulative impacts associated with construction activities and the O&M phase. Chapter 13 (Commercial Fisheries) potential for cumulative impacts arising from reduction in access to fishing grounds, displacement and fisheries resource effects. There is also potential for cumulative impacts on GVA, employment and supply chain to arise.					
Other developments (all tiers)						
Tidal farms, wave farms, Offshore Export Cable Route and Carbon Capture and Storage (CCS) in the North East coastal waters of Scotland	Various other developments at leasing/concept/early planning stage with potential for an overlap in cumulative impacts associated with the workforce required for construction and O&M of the Proposed Development.					Yes. Potential for construction or operational phases to interact with construction or operational phases of the Proposed Development.

Maximum Design Scenario

18.12.15 The MDS identified in Table 18.48 have been selected as those having the potential to result in the greatest effect on an identified receptor or receptor group. The cumulative effects presented and assessed in this section have been selected from the details provided in Volume 1, Chapter 3: Project Description as well as the information available on other projects to inform a 'MDS'. Any other development scenario within the PDE, will result in in the same, or lower, level of environmental effect.

18.12.16 The list of screened-in projects in Table 18.48 for 'Impact on GVA and employment' and 'Impact on demographics, demand for housing and local services, and socio-cultural factors' presents projects with construction, O&M and decommissioning phases which overlap with the construction of the Proposed Development, as these phases are considered to have the greatest potential for cumulative effects. Projects with O&M phases that overlap with O&M of the Proposed Development are considered likely to have less pronounced cumulative effects and for brevity are not listed here. Refer to Annex A1.2 of Volume 3, Technical Appendix 4.4: Cumulative Effects Assessment – Screening for the complete list.

Table 18.49: Maximum Design Scenario for CEA

<table>
<tr><th rowspan="2">Potential Cumulative Effect</th><th colspan="3">Phase</th><th rowspan="2">Maximum Design Scenario (MDS)</th><th rowspan="2">Justification</th></tr>
<tr><th>C</th><th>O&M</th><th>D</th></tr>
<tr><td>Impact on GVA, employment and supply chain</td><td colspan="3">All Phases</td><td>The MDS in Table 18.22 and cumulatively with the following projects. Note that Bowdun Onshore Transmission Infrastructure is already included in the MDS for this subtopic.
<u>Tier 2:</u>
• Aspen OWF
• Ayre OWF
• Berwick Bank OWF
• Berwick Bank OFTO
• Cenos OWF
• Culzean Floating OWF Pilot Project
• Green Volt OWF
• Inch Cape OWF
• Inch Cape OFTO
• MarramWind OWF
• Muir Mhor OWF
• Neart Na Gaoithe OWF
• Ossian OWF
• Salamander OWF
• Seagreen Phase 1 OWF
• Seagreen 1A Project
• West of Orkney OWF
Other OWFs and associated export cable corridors in the North Sea, English Channel, Celtic Sea and Irish Sea.
Other North Sea OWFs and associated export cable corridors off Belgium, Netherlands, Germany, France and Denmark.
<u>Tier 3:</u>
• Morven Hawthorn Pit Grid Connection Project
• Morven North OWF
• Morven South OWF
• Machair OWF
• Havbredey OWF
• Talisk OWF</td><td><u>Tier 1</u>:
The Project comprises both offshore and onshore elements; the Proposed Development would not proceed without the onshore works, and vice versa. Impacts on GVA and employment arising from the Project investment are linked; these have been assessed together and are presented in Section 18.10.

<u>Tier 2 and Tier 3:</u>
Construction of the Proposed Development overlaps with either construction, O&M or decommissioning of these projects. Impacts on GVA, employment and supply chain could arise due to concurrent demand for materials and labour supply. Should demand exceed available supply, labour and materials may need to be sourced from elsewhere (e.g. outside of Scotland or the UK). This could have an adverse impact on the GVA, and employment benefits assessed for the Proposed Development at a regional and national level.
Similar impacts could be expected where there are overlapping O&M phases with the Proposed Development and other projects. However, due to the longer timescales involved, this could encourage development of the OWF supply chain; regionally, nationally and internationally.</td></tr>
</table>

<table>
<tr><th rowspan="2">Potential Cumulative Effect</th><th colspan="3">Phase</th><th rowspan="2">Maximum Design Scenario (MDS)</th><th rowspan="2">Justification</th></tr>
<tr><th>C</th><th>O&M</th><th>D</th></tr>
<tr><td></td><td colspan="3"></td><td>Spiorad na Mara OWF
Stromar OWF
Arven OWF
Stoura OWF
Ossian Transmission Infrastructure
Other OWFs and associated export cable corridors in the North Sea, English Channel, Celtic Sea and Irish Sea, and off Belgium, Netherlands, Germany, France and Denmark.</td><td></td></tr>
<tr><td>Impact on demographics, demand for housing and local services, and socio-cultural factors</td><td colspan="3">All phases</td><td>The MDS is as detailed for the Proposed Development alone in Table 18.22 and cumulatively with the following projects:
<u>Tier 1:</u>
Bowdun Onshore Transmission Infrastructure
<u>Tier 2:</u>
Aspen OWF
Ayre OWF
Berwick Bank OWF
Berwick Bank OFTO
Cenos OWF
Culzean Floating OWF Pilot Project
Green Volt OWF
Inch Cape OWF
Inch Cape OFTO
MarramWind
Muir Mhor OWF
Neart Na Gaoithe OWF
Ossian OWF
Salamander
Seagreen Phase 1 OWF
Seagreen 1A Project
West of Orkney OWF
<u>Tier 3:</u>
Morven Hawthorn Pit Grid Connection Project
Morven North OWF</td><td><u>Tier 1:</u>
The study areas and construction periods for the Proposed Development and the onshore works overlap and require the utilisation of a temporary workforce over a total five-year period. It is considered likely that the construction workforce for both elements would reside in the same locality, resulting in a cumulative effect on demographics, placing increased pressure on housing and local services, and impacting on socio-cultural factors.
<u>Tier 2 and Tier 3:</u>
Construction of the Proposed Development overlaps with either construction or decommissioning of these projects, which are located within the same study area. It is possible that the construction and decommissioning workforce for these projects could reside in the same locality as the workforce for the Proposed Development, resulting in a cumulative effect on demographics, placing increased pressure on housing and local services, and impacting on socio-cultural factors.</td></tr>
</table>

Potential Cumulative Effect	Phase			Maximum Design Scenario (MDS)	Justification
	C	O&M	D		
				• Morven South OWF • Machair OWF • Havbredey OWF and Export Cable Corridor • Talisk OWF • Spiorad na Mara OWF • Stromar OWF • Arven OWF • Stoura OWF • Ossian Transmission Infrastructure	All Tier 1, 2, 3 and 4 projects for OWF and other developments in the Regional Socio-Economics Study Area that overlap with the O&M of the Proposed Development could result in the presence of additional workforce, thereby increasing the population in the same areas where the O&M workforce for the Proposed Development would reside. This could result in a cumulative effect on demographics, place increased pressure on housing and local services, and impact on socio-cultural factors.
Impact on tourism and recreational receptors (impact on small vessels activity and deviation of commercial vessels)	All Phases			The MDS is as described for the Proposed Development in Table 18.22 and assessed cumulatively with the following projects: <u>Tier 1:</u> Offshore Renewables • Bowdun Onshore Transmission Infrastructure <u>Tier 2:</u> Offshore Renewables • Aspen OWF • Berwick Bank Wind Farm • Forthwind Demonstration Project • Green Volt OWF (INTOG Site 6 Flotation Energy) • Inch Cape OWF • Muir Mhòr OWF • Ossian OWF • Salamander OWF • Seagreen 1A Project Cables: • Inch Cape OFTO • Seagreen Phase 1A OFTO • Berwick Bank OFTO	These projects involve activities which will result in potential impact to shipping and navigation which may contribute to the impact that the Proposed Development will also affect. This could cause cumulative effects on small vessels used for recreational activities to arise, or disruption to passenger ferries used by tourists.

Potential Cumulative Effect	Phase			Maximum Design Scenario (MDS)	Justification
	C	O&M	D		
				Tier 3 Offshore Renewables: • Bellrock OWF • Morven North OWF • Morven South OWF Cables: • Ossian Transmission Infrastructure • Morven Hawthorn Pit Grid Connection Project • CNSE Project • Eastern Green Link 3 • Eastern Green Link 4 Tier 4: Offshore Renewables: • Flora Floating Wind Farm	
Impact on tourism and recreational receptors (displacement of recreational activities)	All phases			MDS as described for the Proposed Development in Table 18.22 and assessed cumulatively with the following other projects present. Tier 1: Bowdun Onshore Infrastructure. Tier 2: • Aspen OWF; • Berwick Bank OWF; • Berwick Bank OFTO; • Muir Mhor OWF; • Ossian OWF; • Salamander OWF; • Seagreen 1 OWF; • Seagreen Phase 1 OFTO; • Seagreen 1A Project; • Seagreen 1A OFTO; • Inch Cape OFTO; • Neart Na Gaoithe OFTO; • EGL 2;	These projects involve activities which could displace recreational activities (including use of recreational paths, recreational sailing, cruising and recreational fishing). This could cause cumulative effects on tourism and recreational receptors.

Potential Cumulative Effect	Phase			Maximum Design Scenario (MDS)	Justification
	C	O&M	D		
				• Spittal to Peterhead HVDC Link Project; and • Fraserburgh Harbour Development. Tier 3: • Bellrock OWF; • Morven North OWF; • Morven South OWF; • Morven Hawthorn Pit Grid Connection Project; • Ossian Transmission Infrastructure ; • CNSE; • EGL 3; and • EGL 4.	
Impact on tourism and recreational receptors (visual impact)	×	✓	×	The MDS is as detailed for the Proposed Development alone in Table 18.22 and cumulatively with the following projects: Tier 1 Bowdun Onshore Infrastructure. Tier 2 • Berwick Bank OWF (all phases); • Inch Cape OWF (O&M & decommissioning phases); • Muir Mhor OWF (O&M & decommissioning Phases); • Ossian OWF (all phases); and • Salamander OWF (O&M & decommissioning Phases) Tier 3 • Morven North OWF (all phases); and • Morven South OWF (all phases). Tier 4 Flora Floating OWF.	These projects involve activities which will result in potential impact to Seascape, Landscape and Visual receptors which may contribute to the impact that the Project will also affect. This could cause cumulative visual effects on tourism and recreational receptors arising from the presence of wind turbines, OSPs and vessels, and the onshore infrastructure. The construction and decommissioning phases were scoped out of the CEA for the Seascape, Landscape and Visual assessment (Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts).
Disruption/ displacement of commercial fishing activities, and resulting supply chain,	All phases			The MDS is as detailed for the Proposed Development alone in Table 18.22 and cumulatively with the projects described in Table 13.5 of Volume 2, Chapter 13: Commercial Fisheries.	These projects involve activities which will result in potential impact to commercial fisheries which may contribute to the impact that the Proposed Development will also affect. The cumulative reduced value of fish caught by commercial fisheries could have potential

Potential Cumulative Effect	Phase			Maximum Design Scenario (MDS)	Justification
	C	O&M	D		
employment and socio-cultural impacts					downstream impacts, for example on fish processors. This could have a greater impact on the fishing industry and associated supply chain and employment than the Proposed Development in isolation. Socio-cultural impacts could also arise for communities who rely on fishing for their livelihoods.

IMPACT 1 – IMPACT ON GVA, EMPLOYMENT AND SUPPLY CHAIN

18.12.17 As the assessment on GVA and employment has been undertaken for the Project (onshore and offshore elements together (Volume 3, Technical Appendix 18.3: Socio-Economics, Tourism and Recreation Combined Assessment (Onshore and Offshore)), the assessment presented in this chapter inherently includes Tier 1 (Bowdun Onshore Infrastructure). There are potential cumulative effects on GVA and employment as a result of the Project when considered collectively with the large number of other existing and proposed OWFs (including ScotWind and INTOG Projects). These impacts are expected to arise most prominently in relation to instances where the Project's construction or decommissioning phase overlaps with the construction or decommissioning phase of another project. These phases will have greater demand for competition for labour and resources, due to the higher levels of investment activity occurring across a shorter timeframe than during O&M.

18.12.18 As ports for the construction and decommissioning phases are unknown at this stage, the CEA considers effects at a Scotland-wide level for these phases. For the O&M phase, where the Applicant has committed to a port in Aberdeenshire, Aberdeen City or Angus, the CEA considers effects in the context of the Regional Socio-Economic Study Area.

Construction phase

18.12.19 Should the construction phase of the Project overlap with the construction phase of other OWF projects requiring similar materials and expertise, this could have an impact on supply chain and labour capacity, due to competition for available resources and labour pool. A shortage of available supply capacity (for example, the availability of ports and vessels) could result in the allocated regional/Scottish content for the Project having to be sourced from elsewhere. Projects located outside of Scotland, in the rest of the UK and in Europe, could also place increased demand on materials and labour supply, due to the specialist nature of the infrastructure and skills required. As a result, estimates for employment and GVA creation impacts for the Project may not be realised in full. Where O&M phases of other projects overlap with the construction of the Project, these effects are expected to be less pronounced due to the different resources and activities required for these phases.

18.12.20 Conversely, the strong pipeline of offshore wind development could provide an opportunity for further development and investment in the supply chain relevant to the Project. This could encourage additional private investment in growing the supply chain capacity, such as in new production facilities and equipment and in workforce recruitment and upskilling. Commitments have been made for a factory to manufacture subsea cables in Nigg, Highland and in Ayrshire, expected to provide over 150 jobs (REF) and 900 jobs respectively. Proposals for other factories elsewhere in Scotland are progressing for the manufacture of Wind Turbine blades, in Inverness and Leith. In addition, the expansion of Port of Cromarty Firth will make it the first port able to make floating offshore Wind Turbines on site and at scale in the UK, backed by a grant from the Floating Offshore Wind Manufacturing Investment Scheme (FLOWMIS).

18.12.21 There are further opportunities in relation to repurposing technologies, materials and skills related to the declining oil and gas sector that could be utilised for renewable energy and transmission infrastructure. This could be particularly relevant in relation to potential workforce capacity constraints and skills shortages. Alongside another three ScotWind developers, the Applicant has provided funding for a STEM Outreach Programme for early years delivered by the University of Highlands and Islands. The Applicant will consider collaborating with developers of the projects outlined in Table 18.49 to identify potential challenges and opportunities related to skills and employment for the respective projects. This could relate not just to offshore wind projects proposed in Scotland, but in the rest of the UK and Europe.

18.12.22 The offshore wind sector is noted in Scottish Government policies such as the Draft Energy Strategy and Just Transition Plan and Scotland's National Strategy for Economic Transformation as being crucial in the development of Scotland's renewables supply chain, and in replacing jobs that will be lost as the oil and gas sector in the North East declines. The Applicant has outlined commitments to increase capacity in the Scottish supply chain in the Bowdun OWF SCDS and already has a proven track record in successful engagement with businesses, with £5 million Bowdun OWF supply chain spend in Scotland to date.

18.12.23 The Applicant has a continuing programme of engagement across range of marshalling and assembly, and O&M ports, exploring opportunities for complimentary investments, leveraging shareholder capability and know how. The Applicant is providing support to ports to inform the efficient buildout of the infrastructure required to construct OWF projects. This includes provision of detailed information on evolving requirements to help inform port design, usage and sequencing of activity to accommodate the Applicant's needs alongside a range of others, and coordinating with other projects to explore potential to facilitate sequential delivery of multiple OWF projects.

18.12.24 Ports for construction activities have not yet been selected for the majority of the projects outlined in Table 18.49 and for the Project itself. There are other uncertainties related to timings as well as supply chain and procurement requirements for the other projects listed in Table 18.49; therefore it is not possible to undertake a quantitative assessment of cumulative effects for GVA and employment. It is considered that on balance, any reduction in benefits for GVA and employment from the Project arising from supply chain competition is likely to be offset by the increasing supply chain capacity in the renewables sector that the Scottish Government, the Applicant and other private investors are committed to.

18.12.25 Given that the magnitude of the impact is deemed to be low, and the sensitivity of the receptor (economy and labour market of Scotland) is considered to be medium, the likely effect will, therefore, be of **Minor** beneficial significance, which is not significant in EIA terms.

O&M

18.12.26 During O&M, cumulative impacts on GVA and employment could arise from similar energy infrastructure projects that are operational at the same time as the Project. Positive and negative impacts in relation to challenges and opportunities associated with increased supply chain demand are expected to be similar as those identified for the construction phase, though on a lesser scale due to a lower demand for labour and resources. Additionally, as the O&M phase is expected to be 30 years long, there will be more time for the supply chain to adapt to changes in demand and increase capacity gradually, resulting in greater overall benefits for the OWF supply chain.

18.12.27 Ports for O&M activities have not yet been selected for the majority of the projects outlined in Table 18.49 and for the Project itself; though it would be located in the Regional Socio-Economic Study Area. There are other uncertainties related to timings as well as supply chain and procurement requirements for the other projects listed in Table 18.49; therefore it is not possible to undertake a quantitative assessment of cumulative effects for GVA and employment.

18.12.28 Given that the magnitude of the impact is deemed to be low, and the sensitivity of the receptor (economy and labour market of Regional Socio-Economics Study Area) is considered to be high, the likely effect will, therefore, be of **Minor** to **Moderate** beneficial significance. The lower significance rating of **Minor** beneficial (which is not significant in EIA terms) is considered to be the most likely, as due to the volume of other OWF developments occurring in the Regional Socio-Economics Study Area at the same time the additive cumulative effects resulting from the Project are unlikely to be significant.

Decommissioning

18.12.29 Decommissioning of OWF projects is expected to require similar materials and workforce skills as for construction. Projects with decommissioning phases that overlap with the construction phase for the Project could therefore result in cumulative effects, similar to those reported above for construction. Where O&M phases of other projects overlap with the decommissioning of the Proposed Development, these effects are expected to be less pronounced due to the different resources and activities required for these phases.

18.12.30 Ports for decommissioning activities have not yet been selected for the majority of the projects outlined in Table 18.49, and for the Project itself. There are other uncertainties related to timings as well as supply chain and procurement requirements for the other projects listed in Table 18.49; therefore, it is not possible to undertake a quantitative assessment of cumulative effects for GVA and employment.

18.12.31 Given that the magnitude of the impact is deemed to be low, and the sensitivity of the receptor (economy and labour market of Scotland) is considered to be medium, the likely effect will, therefore, be of **Minor** beneficial significance, which is not significant in EIA terms.

IMPACT 2 - IMPACT ON DEMOGRAPHICS, HOUSING AND LOCAL SERVICES, AND SOCIO-CULTURAL FACTORS

Construction phase

18.12.32 Overlapping construction phases of multiple developments requiring a temporary construction workforce could result in a cumulative effect on the demographics of the local area. Due to the uncertainties related to timings as well as construction workforce requirements for the other relevant developments listed in Table 18.49 it is not possible to undertake a detailed assessment of cumulative effects for demographics. However, it is noted that the Tier 1 and 2 developments with construction phases that overlap with the construction of the Proposed Development – Bowdun Onshore Infrastructure; Aspen; Ayre OWF; Berwick Bank OWF; Cenos OWF; MarramWind; Ossian OWF; Seagreen Phase 1A; and West of Orkney OWF – would also require a temporary workforce. Depending on the location of the construction ports for the Project, the workforce for these other developments which could reside in the same TTWA as the workforce for the Project. The same workforce may be utilised across multiple projects, and some may choose to stay in the local area to take advantage of future employment opportunities for projects not yet consented. This would result in workers staying in the local area for a longer period of time, bringing their families, and potentially relocating to the area on a permanent basis.

18.12.33 There could be greater cumulative effect on demographics than the Proposed Development in isolation arising from an influx of working age people to the local and regional area for construction of the projects, offsetting the current trend in outward migration. The temporary construction workforce required for the Proposed Development and overlapping projects could result in a cumulative demand for housing and local services such as healthcare and education. Should a portion of the workforce choose to relocate permanently, there would be a sustained population increase and demand on local services that would continue beyond the construction phase. However, longer contract durations are expected to result in a greater degree of integration and social cohesion.

18.12.34 Cumulative effects on the coastal character and surrounding natural environment may arise where multiple offshore wind projects are constructed concurrently, potentially altering the sense of place that rural coastal communities highly value. Given that access to nature is closely linked to community wellbeing in these areas, greater changes in the coastal setting may influence local perceptions of environmental quality and social cohesion.

18.12.35 The assessment of demographic change undertaken for the Onshore Infrastructure assumed that approximately 32.9% of jobs would be sourced locally, from Aberdeenshire and Angus, in accordance with draft employment targets. Considering the relatively low numbers of the construction workforce at the peak of construction in relation to the total population in the key population settlements in the regional area, the significance of impact on demographics during construction was considered to be Negligible. For the CEA, the Bowdun OWF Onshore EIA Report (BOWFL, 2025) reported Minor beneficial cumulative effects for change in demographics, and Minor adverse cumulative effects for changes in demand for housing and local services.

18.12.36 The assessment of socio-cultural impacts during construction undertaken for the Onshore Infrastructure reported a Minor (not significant) effect, following implementation of Additional Mitigation measures. The CEA for the Onshore Infrastructure found that multiple developments under construction at the same time in the local area could increase the presence of a transient workforce, cause greater disruption to journeys, local facilities and recreational areas, and have a greater impact on community values and wellbeing, than the Onshore Infrastructure in isolation. Best practice mitigation measures are expected to be implemented across other developments which would reduce these effects, however a Moderate adverse (significant) effect would remain. It is considered that due to the location of ports in the region, and the lack of impacts anticipated for the communities around Landfall, that the communities affected by the Onshore Infrastructure are unlikely to be the same as those affected by the Offshore Infrastructure. Therefore, the Proposed Development is unlikely to contribute cumulatively to this effect; different communities would be impacted by each element of the Project, based on the location of infrastructure and the construction activities taking place.

18.12.37 For the Proposed Development, at this stage it is uncertain where the construction workforce would reside as this would be largely dependent on the port selected for the construction phase. The magnitude of impact for demographics, change in demand for housing and local services and socio-cultural impacts would be determined based on the characteristics of the host communities in the port locations. Effects could be beneficial or adverse and could be expected to range from **Negligible** (not significant) to **Major** (significant). The Applicant has committed to the preparation of an Accommodation Strategy to determine how the project will meet the demand for accommodation from its workforce, providing clarity on accommodation for workers and avoiding disruption to local accommodation. The Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind developments and associated recommendations.

18.12.38 As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

O&M phase

18.12.39 As the offshore wind pipeline continues to grow in the Regional Socio-Economics Study Area, the Project and other offshore windfarm projects with aligning O&M phases will contribute to the creation of long-term jobs in the region. This could encourage developers to create ‘hubs’ around O&M ports to incentivise developers to choose these locations, as has been the case for the Inverness & Cromarty Firth Green Freeport in the Highlands. Expanding port activity and capacity around these hubs is likely to result in additional demographic impacts and demand for housing and local services. It is anticipated that these hubs would work in collaboration with local authorities, government bodies and developers to unlock opportunities and address regional and local challenges, including demand for housing and services.

18.12.40 Furthermore, increased offshore wind development is likely to generate higher long-term demand for skilled workers within the region, supporting improved wellbeing through access to stable and meaningful employment. In the longer term, cumulative effects may also occur during the operational phase, as the Project functions alongside other offshore renewable energy projects to generate low-carbon electricity. The combined contribution of these developments is likely to enhance the region's role in climate change mitigation. By reducing reliance on fossil fuels at scale, this 'hub' of offshore wind developments may help to protect coastal and marine environments, strengthening local resilience to climate impacts and providing indirect benefits for communities that depend on a healthy coastal environment for their wellbeing.

18.12.41 As set out in the Bowdun OWF Onshore Scoping Report (BOWFL, 2024), the O&M phase was scoped out of the assessment for changes to demographics and local services for the Onshore Infrastructure; this is because the level of employment during the O&M phase for this element of the Project is expected to be low. For socio-cultural impacts, the assessment undertaken for the Onshore Infrastructure reported an effect of **Minor** beneficial (not significant) for the O&M phase. The CEA reported a cumulative effect of **Minor** adverse (not significant). Similar to for the construction phase, the communities affected by the Onshore Infrastructure are unlikely to be the same as those affected by the Offshore Infrastructure. Therefore, the Proposed Development is unlikely to contribute cumulatively to this effect.

18.12.42 As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

Decommissioning

18.12.43 Should decommissioning of the Proposed Development occur at the same time as construction or decommissioning of other offshore wind projects in the associated TTWA, similar impacts related to changes in demographics would be similar as those identified for the construction phase.

18.12.44 For the assessment of changes in demographics during decommissioning for the Onshore Infrastructure, it was assumed that during decommissioning there would be a smaller workforce required, and for a shorter duration than for the construction phase. Considering the proportion of the temporary decommissioning workforce would be very low in comparison to the overall population in the TTWA, the lower significance rating of Negligible was deemed the most likely effect. For the CEA, the Onshore Infrastructure assessment reported Minor beneficial cumulative effects for change in demographics, and Minor adverse cumulative effects for changes in demand for housing and local services. The decommissioning phase was scoped out of the assessment for socio-cultural impacts for the Onshore Infrastructure.

18.12.45 For the Proposed Development, at this stage it is uncertain where the decommissioning workforce would reside as this would be largely dependent on the port selected for decommissioning. The magnitude of the impact would depend on the characteristics of the host communities in the port locations, and as such cannot yet be determined.

18.12.46 As outlined in the monitoring commitments (Table 18.32), once port location(s) is known, the Applicant will review the assessment.

IMPACT 3 - IMPACT ON TOURISM AND RECREATIONAL RECEPTORS

Construction phase

18.12.47 Construction of the Proposed Development overlapping with construction or decommissioning of other projects has the potential to interact and have a cumulative effect on tourism and recreation receptors in the study area. The following cumulative effects have been identified from the CEAs undertaken for the relevant environmental topics:

- Impact on small vessel activity and deviation of commercial vessels (Volume 2, Chapter 14: Shipping and Navigation)
- Displacement of recreational activities (Volume 2, Chapter 16: Infrastructure and Other Users).

18.12.48 Visual effects associated with wind turbines, OSPs and vessels were scoped out of the construction phase for the CEA in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts.

18.12.49 Additionally, the assessment undertaken for the Onshore Infrastructure of the Project considers impacts on tourism and recreation receptors that fall within the Tourism and Recreation Study area for the Proposed Development and therefore are also considered within this CEA.

18.12.50 As outlined in Volume 2, Chapter 14: Shipping and Navigation, recreational vessel activity within the Shipping and Navigation Study Area was focused closer to the coastline east of the Array Area, with little activity in the Array Area itself. In the cumulative scenario, small vessels which may have deviated to avoid Proposed Development activities will have adequate sea room to make safe deviations. The overall significance of the cumulative effect on small vessel reported in Volume 2, Chapter 14: Shipping and Navigation is Minor.

18.12.51 As outlined in Volume 2, Chapter 14: Shipping and Navigation, additional commercial vessel routes may be impacted from the Proposed Development interacting with Tier 2 projects, particularly Ossian OWF. It is noted that no regular running ferry services are expected to the be impacted. The overall cumulative effect is assessed as Minor adverse significance. Similarly, an overall likely Minor adverse significance of effect was reported for Tier 3 projects.

18.12.52 Volume 2, Chapter 16: Infrastructure and Other Users reports that the installation of Offshore Infrastructure within the Array Area and along the Export Cable Corridor, together with the Tier 1, Tier 2 and Tier 3 projects identified (refer to Table 18.49), may displace recreational activities, resulting in a loss of recreational resource. However, impacts associated with Safety Zones during the construction phase is mostly reversible as they are temporary in nature and once each structure has been installed and commissioned these will be removed. Additionally, Embedded Mitigation measures such as NtMs, Kingfisher Bulletins and other navigational warnings advising of the location, nature and timing of activities will ensure that recreational activities can be planned accordingly. It is expected that similar measures are likely to apply at the other projects as standard practice. The cumulative effect reported in Volume 2, Chapter 16: Infrastructure and Other Users is therefore of Minor adverse significance, which is not significant in EIA terms.

18.12.53 For the assessment undertaken for the Onshore Infrastructure, a Minor (not significant) effect was reported for changes to tourism and recreation receptors during the construction phase. The CEA undertaken for the Onshore Infrastructure also reported cumulative effects of Minor adverse (not significant) for changes to tourism and recreation receptors. No cumulative effect on tourism and recreation from both elements of the Project is anticipated.

18.12.54 In relation to the broader sense in which tourist perceptions of an area could be impacted by construction of the Project, research has been undertaken by Biggar Economics (2020) into this specifically, analysing indicators of the tourism industry in 11 comparable cases in England. The research assessed the empirical evidence on the relationship between offshore wind farm construction – and associated infrastructure such as cabling and the onshore substation – to identify any changes in visitor behaviour or spending during the construction period. No evidence was found to support this. Instead, it was found that areas, including those with landscape sensitivities, were not impacted by the construction activities of offshore wind farms (Biggar Economics, 2020).

18.12.55 Taking this into account, as well as the conclusions of the relevant environmental topics, no significant residual environmental effects are expected during construction arising from the Project or other screened in developments that would impact on tourism receptors in relation to the ability of tourists to enjoy these attractions, or that would deter them from visiting. Accordingly, no significant cumulative effects are anticipated to arise for tourism and recreation receptors during this phase. No Additional Mitigation is considered necessary because the likely effect in the absence of Additional Mitigation is not significant in EIA terms.

O&M phase

18.12.56 O&M phase cumulative effects have been identified from the CEAs undertaken for the relevant environmental topics to determine the cumulative effect on tourism and recreational receptors.

18.12.57 It is noted in Volume 2, Chapter 14: Shipping and Navigation that the full build out of the Proposed Development during O&M will have the largest impact on small recreational vessels given the greatest presence of surface and subsurface infrastructure. Nevertheless, given the sea room available for deviations and the small additional distances, it is anticipated that the overall significance of the cumulative effect will be Minor.

18.12.58 Volume 2, Chapter 16: Infrastructure and Other Users reports that the installation of Offshore Infrastructure within the Array Area and along the Export Cable Corridor, together with the Tier 1, Tier 2 and Tier 3 projects identified (refer to Table 18.49), may displace recreational activities, resulting in a loss of recreational resource. Potential cumulative effects are assessed for recreational vessel activities occurring in proximity to other OWF developments with aligning O&M phases; within the vicinity of Fraserburgh Harbour Development; and between Montrose and Aberdeen, further inshore. As with the construction phase, Embedded Mitigation measures such as NtMs, Kingfisher Bulletins and other navigational warnings advising of the location, nature and timing of activities will ensure that recreational activities can be planned accordingly. It is expected that similar measures are likely to apply at the other projects as standard practice. The cumulative effect reported in Volume 2, Chapter 16: Infrastructure and Other Users is therefore of Minor adverse significance, which is not significant in EIA terms.

18.12.59 Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts reports on the cumulative effect of the O&M of the Proposed Development on visual receptors/views, in relation to Wind Turbines, OSPs and vessels. The assessment reports that there is no cumulative change or interaction between the Proposed Development and any of the identified Tier 2, Tier 3, or Tier 4 projects in relation to the viewpoints. For all viewpoints in Volume 2, Chapter 20: Seascape, Landscape and Visual Impacts the cumulative effect of the Proposed Development Tier 2, Tier 3, and Tier 4 projects is assessed as None/Minor, which is not significant in EIA terms.

18.12.60 Dunnottar Castle was the only tourism receptor with the potential to be impacted by both the Onshore Infrastructure and Proposed Development, for the O&M phase only. The onshore assessment considered this receptor in relation to traffic and transport (vehicular access from the A92), while the assessment for the Proposed Development considered this receptor in relation to its setting as a cultural heritage asset. No significant residual effects on this receptor were reported, and no cumulative effects are anticipated.

18.12.61 For the assessment undertaken for the Onshore Infrastructure, overall, a Negligible (not significant) effect was reported for changes to tourism and recreation receptors during O&M. The CEA undertaken for the Onshore Infrastructure also reported cumulative effects of Minor adverse (not significant) for changes to tourism and recreation receptors. No cumulative effect on tourism and recreation from both elements of the Project is anticipated.

18.12.62 There is potential for multiple overlapping offshore wind projects to have an adverse cumulative effect on tourism due to changing visitor perceptions. However, it is considered that the findings of the public perceptions studies outlined in paragraph 18.10.113 to paragraph 18.10.115 would also apply in the context of multiple offshore wind projects taking place concurrently, and that visitors are unlikely to be dissuaded from visiting the local area due to the presence of offshore infrastructure.

18.12.63 Taking this into account, as well as the conclusions of the relevant environmental topics, there is not expected to be any significant cumulative effects for tourism and recreation receptors during this phase. No Additional Mitigation is considered necessary because the likely effect in the absence of Additional Mitigation is not significant in EIA terms.

Decommissioning

18.12.64 The cumulative effects reported in the relevant environmental topic chapters for decommissioning are as reported for the construction phase. As a result, there is not expected to be any significant cumulative effects for tourism and recreation receptors during this phase. No Additional Mitigation is considered necessary because the likely effect in the absence of Additional Mitigation is not significant in EIA terms.

IMPACT 4 - DISRUPTION/DISPLACEMENT OF COMMERCIAL FISHING ACTIVITIES, AND POTENTIAL FOR RESULTING SUPPLY CHAIN, EMPLOYMENT AND SOCIO-CULTURAL IMPACTS

All phases

18.12.65 The conclusions of the CEA undertaken for Volume 2, Chapter 13: Commercial Fisheries were reviewed to determine the potential for cumulative effects on disruption and/or displacement of commercial fishing activities. Should significant cumulative effects arise, there could be a potential for cumulative effects on the supply chain and employment that the fishing industry and associated downstream industries supports. Additionally, there could be socio-cultural impacts on fishing communities who rely on these resources for their livelihoods.

18.12.66 Volume 2, Chapter 13: Commercial Fisheries has assessed the cumulative impacts of reduced access and associated displacement of fishing activity together with other projects. A moderate adverse effect was assessed for UK demersal otter trawl/seine and scallop dredge fisheries, arising from the presence of other OWF developments and management measures being implemented within MPAs. However, the contribution of the Proposed Development to these significant cumulative effects is very limited and additional Mitigation in the form regional scale monitoring of fisheries activity is proposed. This monitoring will be delivered via the FMMCP (presented in Volume 4, Appendix 28: FMMCP), future updates to which may be informed by monitoring outcomes. Overall, this lowers the residual impact of cumulative reduced access and associated displacement to be minor adverse and not significant in EIA terms, as reported in Volume 2, Chapter 13: Commercial Fisheries.

18.12.67 Taking this into account, as well as the conclusions of the relevant environmental topics, there is not expected to be any significant cumulative effects on supply chain, employment, or fishing community livelihoods during this phase.

18.13 Transboundary Effects

18.13.1 Transboundary impacts for Socio-Economics, Tourism and Recreation have been screened out during the scoping stage. Further details are provided in Volume 3, Appendix 4:5: Transboundary Impacts – Screening.

18.14 Summary of Impacts, Mitigation, Likely Significant Environmental Effects and Monitoring

18.14.1 The Project has the potential to support a considerable level of economic activity in Scotland and the UK over the full project lifecycle (construction, O&M and decommissioning).

18.14.2 The Project will contribute to meeting Scotland's and the UK's net-zero targets and supports the decarbonisation of economic activity. The Project expenditure will drive economic activity and stimulate local industries through the GVA and jobs that it supports.

18.14.3 A refresh of the Bowdun OWF SCDS is being undertaken in 2026 to reflect the changing investment and supply chain landscape. The revised expenditure figures developed for the SCDS have informed the quantitative assessment of GVA and employment impacts presented in this chapter. The updated GVA and employment effects reflect the increased spend - particularly in manufacturing and fabrication in Scotland - beyond the 2023 SCDS commitments which informed the assessment of GVA and employment impacts presented in Volume 1, Bowdun OWF Onshore EIA Report (BOWFL, 2025).

18.14.4 Impacts on GVA and employment were assessed for the combined onshore and offshore elements of the Project. As with spending, GVA and employment impacts are inclusive (i.e. impacts in the UK include those occurring across Scotland). Across the full project lifecycle (construction, O&M and decommissioning) it is expected that under the updated Scenario 1 ('Commitments' scenario), the Project would support:

- Employment of 23,478 aFTEs (2,087 FTEs), and £1,934 million GVA in Scotland; and
- Employment of 34,224 aFTEs (5,083 FTEs) and £2.5 billion GVA across the UK.

18.14.5 The Applicant has committed to locating an O&M port within Aberdeenshire, Aberdeen City or Angus (the Regional Socio-Economics Study Area). As construction and marshalling ports have not yet been selected, GVA and employment effects were assessed for the Regional Socio-Economics Study Area for the O&M phase only. It is expected that during this phase, the Project would support 6,279 aFTEs (209 FTEs), a **Major** (significant) beneficial effect; and generate £522 million GVA in the Regional Socio-Economics Study Area, a **Moderate** (significant) beneficial effect.

18.14.6 The Project presents a strategic opportunity to integrate the existing Scottish oil and gas supply chain firms into the offshore wind sector via the unique supply chain pathways programme, developed by the Applicant in associated with DEME Offshore, aimed at facilitating the transition of traditional energy service providers into renewable energy markets. The Applicant's supply chain strategy seeks to address structural barriers that have historically limited local participation in offshore wind development, particularly the dominance of Tier-1 contractors.

18.14.7 The Applicant remains committed to engaging local suppliers and supporting growth in the regional and Scottish supply chain, as set out in the Bowdun OWF SCDS. Initial analysis undertaken in preparation for updating the SCDS indicates potential for increasing anticipated Scottish spend beyond current commitments.

18.14.8 Effects arising from changes in demographics and changes to demand for housing and other services during construction and decommissioning could be expected to range from **Negligible** (not significant) to **Major** (significant), (beneficial or adverse) depending on the location of chosen ports for these phases. For the O&M phase, as the Applicant has committed to an O&M port in the Regional Socio-Economic Study Area, proxy scenarios were modelled for an urban and rural port location in this area to provide an indicative magnitude of change, which suggested that the magnitude would be high for the rural scenario (Montrose) and low for the urban scenario (Aberdeen City). Taking into account a combination of structural, economic and social factors, urban locations were considered to be of low to medium sensitivity and rural locations a high to very high sensitivity. Therefore, demographic effects range from **Minor** (not significant) to **Major** (significant) (beneficial or adverse), in EIA terms, depending on the final O&M port location. As demand for housing and services is driven by demographic change, these effects were assessed within the same significance range. As outlined in the monitoring commitments, once port location(s) for each phase are known, the Applicant will the assessment following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.

18.14.9 During construction, O&M, and decommissioning, impacts on the socio-cultural character of the local area, changes to community cohesion and local industries, and a resulting effect on community wellbeing, could give rise to adverse effects. However, there are also expected to be positive impacts on livelihoods and wellbeing from local employment and supply chain opportunities and enhanced participation in community events due to an increase in population. For both construction and O&M, the effect will depend on the location of the port(s) but are expected to be of **Minor** to **Major** significance (beneficial or adverse), which ranges from not significant to significant in EIA terms. As outlined in the monitoring commitments, once port location(s) for each phase are known, the Applicant will review the assessment following a decision on the construction and O&M ports, including identification of any Additional Mitigation measures.

18.14.10 Additionally, the Applicant will retain involvement with SOWEC and Crown Estate Scotland on any future sector-wide research proposed for communities affected by offshore wind projects, and associated recommendations.

18.14.11 For changes to tourism and recreation receptors and socio-cultural impacts, no significant effects are expected for all three phases of the Proposed Development.

18.14.12 The CEA found that potential for cumulative changes in demographics, demand for housing and local services and socio-cultural impacts would be largely dependent on the port(s) selected for the various stages of the Proposed Development. Effects could be beneficial or adverse and could be expected to range from **Negligible** (not significant) to **Major** (significant). No significant cumulative effects have been identified in relation to GVA and employment, tourism and recreation receptors, and impacts arising from disruption/displacement of fishing activities.

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