Socio-Economic Action Plan

MarramWind Offshore Wind Farm

December 2025

MarramWind - Socioeconomic Action Plan (SEAP) for MarramWind Floating Offshore Windfarm

Technical Report

MarramWind Ltd

December 2025

Delivering a better world

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1. Introduction

MarramWind offshore wind farm will play a crucial role in achieving Scottish and UK net zero targets for 2045 and 2050, whilst also supporting energy security and promoting energy innovation, being one of the largest floating wind projects in development globally. Situated in deep waters 75km off the Northeast coast of Scotland, it is one of 18 projects being brought forward under Crown Estate Scotland's ScotWind leasing round agreements. Large-scale developments such as MarramWind also present a significant opportunity to generate social and economic value, as recognised within Scotland's Energy Strategy & Just Transition Plan, which states that the delivery of the energy transition will secure "continued and increased investment in the net zero energy economy", and deliver "more jobs, a growing supply chain, new manufacturing capabilities, new skills, new export opportunities and thriving communities."[1]

To harness the local and regional opportunities and maximise the social and economic performance of MarramWind Offshore Wind Farm (the Project), MarramWind Ltd – under ownership of ScottishPower Renewables (SPR) – commissioned AECOM and BVG Associates (BVGA) to develop a Socioeconomic Action Plan (SEAP). The SEAP sets out the approach which MarramWind Ltd will take to maximising net economic impact and supporting community wealth building throughout the lifecycle of the Project. It is distinct from but complementary to and should be read in conjunction with the assessment of likely significant effects presented in **Chapter 30 - Socio-economics**[2] of the **MarramWind Environmental Impact Assessment (EIA) Report**. That impact assessment, which considers likely effects from the construction, operation and decommissioning of the Project on employment, supply chains, other relevant economic sectors, communities and businesses across relevant study areas, concludes that the Project will generate a range of significant beneficial effects. The EIA includes the implementation of the SEAP as one of the Project's embedded environmental measures and findings from the SEAP research have been incorporated into **Chapter 30 – Socio-economics** of the EIAR where appropriate.

The immediate requirement for the SEAP is National Planning Framework 4 (NPF4), Policy 11c, which stipulates that "development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities." It also addresses Policy 25 of NPF4, which states that "proposals which contribute to local or regional community wealth building strategies and are consistent with local economic priorities will be supported."[3]Aberdeenshire Council has provided guidance on how to demonstrate accordance with the NPF4 policies within their Pre-Application Advice for MarramWind's onshore planning application, which states that an "Economic Statement/Assessment of Need should be included within any formal submission in accordance with Policy 11c (Energy) and Policy 25 (Community Wealth Building) of NPF4"[4]. The Council's Charter for Energy Development in Aberdeenshire[5] outlines the requirements for the Statement/Assessment and sets out the principles and expectations for developers to deliver against policies 11c and 25 at a local authority level.

The SEAP has been created through a mix of desk-based and primary research, which inform the recommendations and actions presented herein. The desk-based research comprises: an assessment of the current social and economic situation in the Northeast of Scotland; an assessment of the existing supply chain capabilities within Scotland and the Northeast; and a review MarramWind's pre-existing Supply Chain Development Statement (SCDS) commitments alongside relevant policies and guidance. The findings of the desk-based assessment have been validated and enhanced via a series of stakeholder workshops, which were used to garner additional information and insights, and seek stakeholder feedback on recommendations for use in the SEAP.

The recommendations presented within the SEAP reflect the findings of the desk-based and primary research undertaken by AECOM and BVGA. These recommendations have, in turn, been used by the SPR's MarramWind project team to create a framework for action. Where actions are subject to

[1] Scottish Government (2023). Scotland's Energy Strategy and Just Transition Plan: Ministerial Statement. Available at: Scotland's Energy Strategy and Just Transition Plan: Ministerial statement - gov.scot (www.gov.scot)
[2] MarramWind Ltd (2025). Environmental Impact Assessment Report Volume 1, Chapter 30: Socio-Economics. Available at: Document Library - MarramWind
[3] Scottish Government (2023). National Planning Framework 4. Available at: National Planning Framework 4 - gov.scot
[4] Aberdeenshire Council (2024). Pre-Application Advice: Proposed Onshore Substation, Underground Cable and Associated Infrastructure (Connecting into Netherton Hub) at MarramWind Offshore Wind Farm Development.
[5] Aberdeenshire Council (2025). Charter for Energy Development in Aberdeenshire. Available at: Community Wealth Building Strategy | Engage Aberdeenshire

dependencies, these dependencies have been stated. For example, the implementation of a MarramWind community benefit fund is dependent on MarramWind Offshore Wind Farm becoming operational. Where possible, specific timebound actions have been included within the SEAP, particularly for near-term activities. In instances where the nature of an action's delivery is dependent on a project design decision yet to be taken by MarramWind Ltd in order to be effective, the action has been described in general terms. For example, actions to support awareness raising of contract opportunities arising from the construction of MarramWind will be most effective when the Project has determined its preferred technology choices and contracting structures.

The SEAP is intended to be an evolving document to be updated at regular intervals as MarramWind progresses towards construction and operation. This will allow it to remain responsive to the opportunities arising from MarramWind, which will crystalise over time as decisions are taken regarding design, technologies and the locations of the Project's activities. It will also enable the SEAP to remain aligned to community needs and aspirations, which may likewise change over time.

This technical report presents the findings of the SEAP research and analysis for the purpose of illustrating how the how the SEAP recommendations and actions were derived. These findings are presented in full within this report within the following chapters.

Chapter 2 of this report sets out the social and economic profile of the Northeast of Scotland and, at a more local level, of Fraserburgh, Peterhead, Buchan, Troup, Turriff and Ellon. The Northeast and these communities represent the regional and local study areas respectively which are likely to be impacted by MarramWind due to their proximity. The focus on these regional and local study areas is to inform the development of actions in the SEAP which are relevant to regional and local businesses and communities and also align with the expectations of the Aberdeenshire Council's Charter for Energy Development. This section identifies challenges and opportunities that MarramWind's SEAP will seek to address. The chapter assesses the current socioeconomic situation across relevant geographies to understand the potential socioeconomic impacts of MarramWind. Relevant indicators were selected to capture key social, economic and physical characteristics of the project's study area that have the potential to interact with and be impacted by offshore wind developments.

Whilst **Chapter 2** explores the social and economic profile specifically of the Northeast and the towns adjacent to the project, **Chapter 3** focuses on the national and regional supply chain for offshore wind developments in Scotland. The supply chain is mapped to identify companies and facilities across Scotland and in the Northeast specifically that could be utilised to deliver MarramWind's SCDS commitments and provide insights to inform SEAP recommendations. This Chapter also considers MarramWind's existing SCDS commitments – both financial and non-financial commitments – in light of the findings of the of the supply chain mapping and evolving market conditions.

Chapter 4 reviews relevant policies and guidance for relevance and alignment. The intention is that the SCDS commitments included in this SEAP will be reviewed in 2026 and may inform a new and updated version of the SEAP. Relevant SEAP actions will likewise be incorporated in MarramWind's 2026 SCDS update.

Chapter 5 summarises the approach to and findings of the stakeholder engagement. Stakeholders were engaged to help identify any gaps in the evidence base and to help shape the recommendations and identifying initiatives or activities for MarramWind to potentially connect with.

Chapter 6 summarises the key challenges and opportunities relevant to the SEAP and provides a set of specific actions based on the policy review conducted in **Chapter 4**. This is to provide the rationale for the SEAP and develop targeted and relevant recommendations.

The final **Chapter 7** of this technical report sets out next steps for the SEAP and commitments by MarramWind Ltd made in response to the recommendations set out in the previous Chapter.

A non-technical summary report – MarramWind: Socioeconomic Action Plan Summary Report– has also been produced to help explain the SEAP to a general audience, including the local communities and businesses that may stand to benefit from its delivery.

2. Social and economic profile

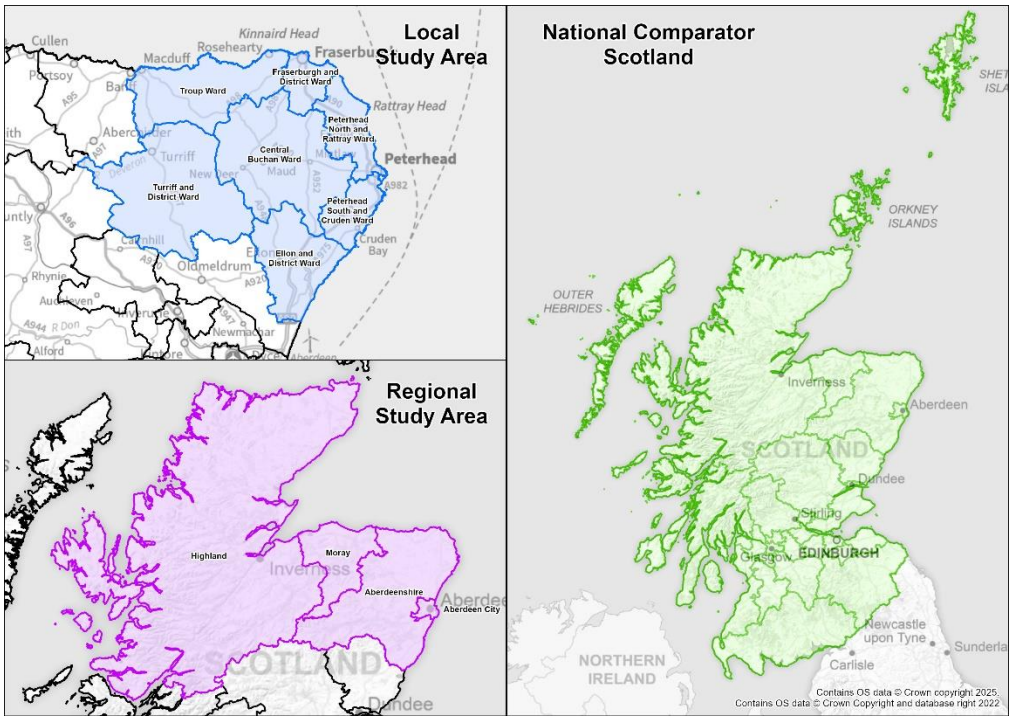
The social and economic profile provides an overview of key demographic, economic, and social indicators to inform the development of the SEAP. The baseline study area used to establish the socioeconomic profile covers a range of local and regional geographies to capture place-based dynamics while maintaining a broader context for comparison. The distinction between a regional (Northeast) and a more local study area is made to help tailor and target the recommendations for the SEAP to the relevant challenges and opportunities, considering that the scale of MarramWind Offshore Wind Farm will require a range of activities to be undertaken across various locations.

Anticipated locations of activity are identified and within the MarramWind EIA and likely impacts are assessed. The SEAP does not consider all locations where impacts may occur, but rather, focusses on the Northeast of Scotland specifically. This focus has been informed by policies 25 and 11c of NPF4, which require development proposals to "contribute to local or regional community wealth building strategies" and "maximise net economic impact, including local and community socio-economic benefit" respectively. As the MarramWind array area is sited off the Northeast coast of Scotland and the project's onshore infrastructure is proposed for construction in the Peterhead area, the SEAP focussed on the region and locations in proximity to this planned infrastructure.

The study areas for this report are defined as the following areas, and shown in Figure Figure :

- **Local study area –** comprised of Scottish Electoral Wards (2022) within Aberdeenshire Council including Fraserburgh and District; Peterhead North and Rattray; Peterhead South and Cruden; Central Buchan; Troup; Turriff and District; and Ellon and District.
- **Regional study area –** comprised of Local Authority administrative boundaries including Aberdeenshire; Aberdeen City; Moray; and Highland. The regional study area of the Northeast of Scotland was selected in recognition of the wider impact of MarramWind on the businesses and people beyond the coastal communities mentioned above. Actions tailored to the wider Northeast of Scotland can help maximise socioeconomic benefits further.
- **National comparator** – Scotland, providing a benchmark for local and regional findings.

Figure 1 Socio-economic Profile Study Area



The baseline draws on the most recent data available from official sources noting that data availability varies across geographies. Qualitative insights from stakeholders and communities have been used to complement this baseline to ensure a rounded understanding of socioeconomic conditions, which are presented within Chapter 5: Stakeholder Engagement.

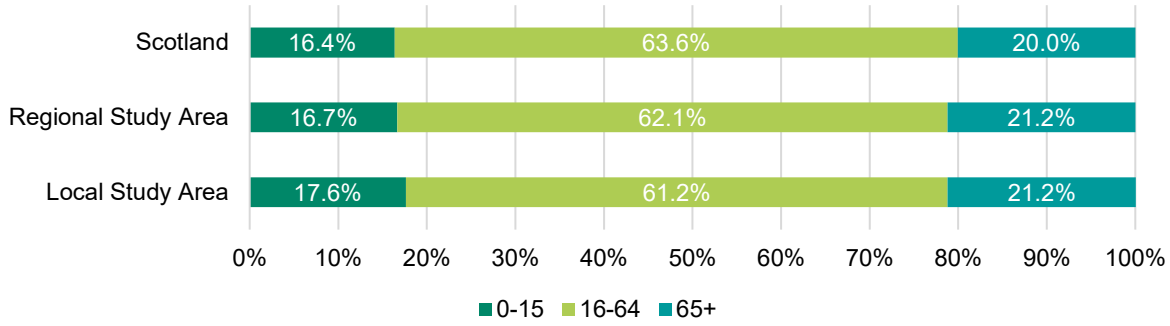
The socio-economic indicators used in this Action Plan have been mapped with the Charter for Energy Development in Aberdeenshire, and the SCDS Commitments to ensure relevance and alignment with local policy priorities.

2.1 Demographic profile

2.1.1 Population

The local and regional study areas have a slightly older age profile compared to Scotland as a whole (see Figure 2). The proportion of working-age residents (aged 16–64) in the local study area is 61.2%, which is marginally lower than the regional study area (62.1%) and the national average (63.6%). Similarly, both the local and regional areas have a slightly higher proportion of older residents aged 65 and over (both 21.2%) compared to Scotland (20.0%). In contrast, the local study area has a marginally higher share of children and young people (aged 0–15) at 17.6%, compared to 16.7% in the regional study area and 16.4% across Scotland. The overall trend indicates a balanced albeit ageing population in the local and regional study areas[6]. In terms of population forecasts, the regional study area is projected to experience a population growth of 1.5% between 2021 and 2040, lower than Scotland's overall projected growth of 2.5%, indicating slower demographic growth[7].

Figure 2 Population and Age Structure



Challenge 1: This demographic trend could pose challenges for workforce availability and economic productivity.

In terms of migration patterns, the regional study area experienced positive net migration, accounting for 12.3% of Scotland's total net migration. This growth was driven primarily by international inflows. In the regional study area, 58.5% of this net positive migration was working age individuals. Aberdeen City accounted for the highest proportion of working-age migrants (60.6%), with Aberdeenshire accounting for the lowest proportion (27.2%). The regional study area also saw a net loss of 1,270 people to other parts of Scotland, which was driven by outflows from Aberdeen City[8].

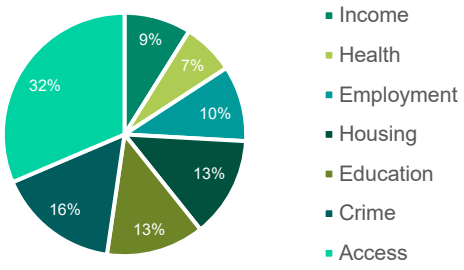
Challenge 2: Despite strong migration inflows, Aberdeenshire attracts relatively few working-age migrants, posing potential workforce retention challenges.

[6] National Records of Scotland (2022). Scotland's Census 2022. Available at: www.scotlandscensus.gov.uk
[7] National Records of Scotland. (2020). Population Projections for Scottish Areas 2018-based. Available at: Population Projections for Scottish Areas 2018-based - National Records of Scotland (NRS)
[8] National Records of Scotland. (2024). Local area migration. Available at: https://www.nrscotland.gov.uk/publications/local-area-migration/

2.1.2 Deprivation

Data from the Scottish Index of Multiple Deprivation (SIMD) provides insight into the spatial distribution and intensity of deprivation across Scotland. In the regional study area, 12.2% of residents live in the most deprived deciles overall. As illustrated in Figure 3, the highest levels of deprivation are recorded in the domains of access to services (32%), crime (16%), education (13%), and housing (13%). This highlights potential areas for targeted community investment and support.

Figure 3 Regional study area SIMD



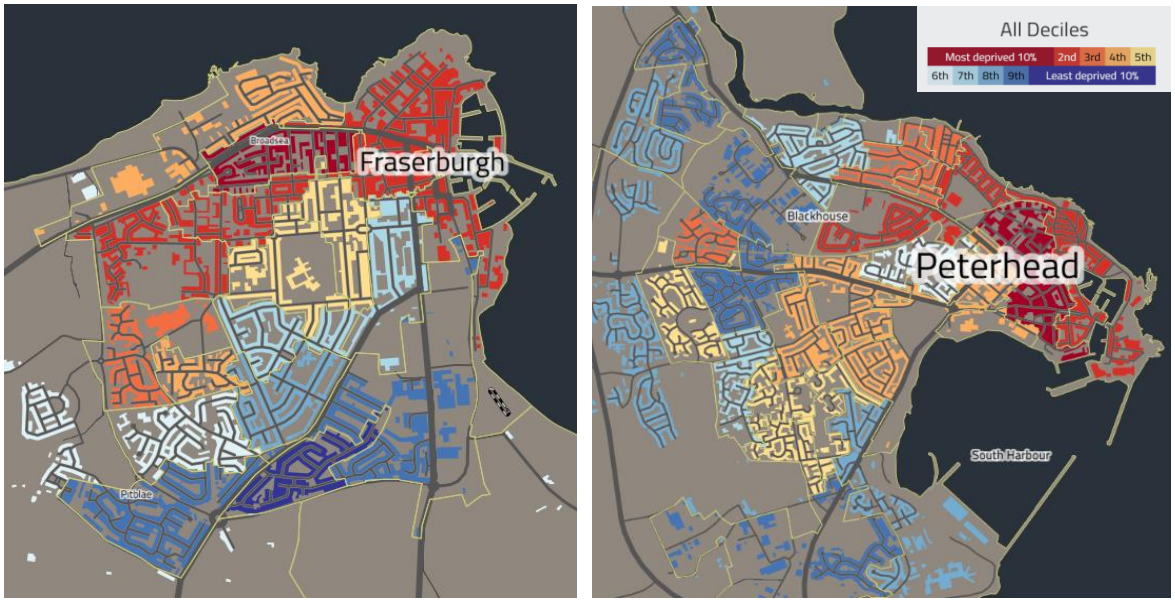
Among the local authorities in the region, Aberdeen City has the highest proportion of residents living in the most deprived deciles across all domains (20.6%), except for access to services (17.0%), where rural areas in the regional study area typically experience greater challenges. Specifically, 52.5% of Highland residents rank within the most deprived deciles in relation to access, followed by Aberdeenshire (52.5%) and Moray (42.8%)[9].

In Aberdeenshire, nine data zones fall within the 20% most deprived in Scotland, representing 0.6% of the national total. All nine are located in Fraserburgh and Peterhead, highlighting concentrated pockets of deprivation within these communities. Specifically, 29% of data zones in Fraserburgh and 17% of data zones in Peterhead are among Scotland's most deprived. Educational deprivation is particularly pronounced, with one-third of Aberdeenshire's most educationally deprived data zones located in Peterhead and Fraserburgh. Notably, 66% of residents in Peterhead live within the 10% most educationally deprived areas in Aberdeenshire, and 7% of young people aged 16–19 are not in education, employment or training (NEET), compared to the local authority average of 3%[10]. In terms of income, nine data zones in Fraserburgh and Peterhead fall within the 20% most income-deprived in Scotland, based on benefit claimant levels. Crime deprivation is also comparatively high, with 84 data zones across Aberdeenshire in the 20% most deprived nationally for recorded crime**,** again, predominantly concentrated in Peterhead and Fraserburgh. In addition, transport accessibility within Peterhead and Fraserburgh is limited. Both areas are identified as being at highest risk of transport poverty in Aberdeenshire, with car ownership comparatively low compared to the nation as a whole, with around 29% of residents in each area without access to a vehicle. Public transport connections to Aberdeen are also limited, with no local railway stations and relatively few bus services, generally operate hourly during peak times. Issues such as congestion, delays, poor interchange with rail services, and limited passenger facilities thereby constrain connectivity[10]. These barriers restrict access to employment, education, and services, particularly for residents without private transport.

These findings highlight the socioeconomic challenges within Fraserburgh and Peterhead relative to the wider Aberdeenshire area. Concentrations of deprivation across income, education and crime domains together with limited transport connectivity point to inequalities linked to limited access to employment, education, and social barriers to opportunity.

[9] Scottish Government. (2020). Scottish Index of Multiple Deprivation 2020. Available at: https://www.gov.scot/collections/scottish-index-of-multiple-deprivation-2020/
[10] Fair Start Scotland (2020). Local Area Case Studies – Fraserburgh and Peterhead. Available at: https://www.gov.scot/publications/fair-start-scotland-evaluation-report-3-local-area-case-studies-year-2/pages/5/

Figure 4 SIMD Ranking in Fraserburgh and Peterhead



Challenge 3: The Regional study area experiences notable deprivation in access to services, crime, housing affordability, and education. Concentrations of deprivation are most pronounced in Peterhead and Fraserburgh, where multiple forms of deprivation, including income, education, and crime coincide with challenges regarding transport connectivity.

2.1.3 Health

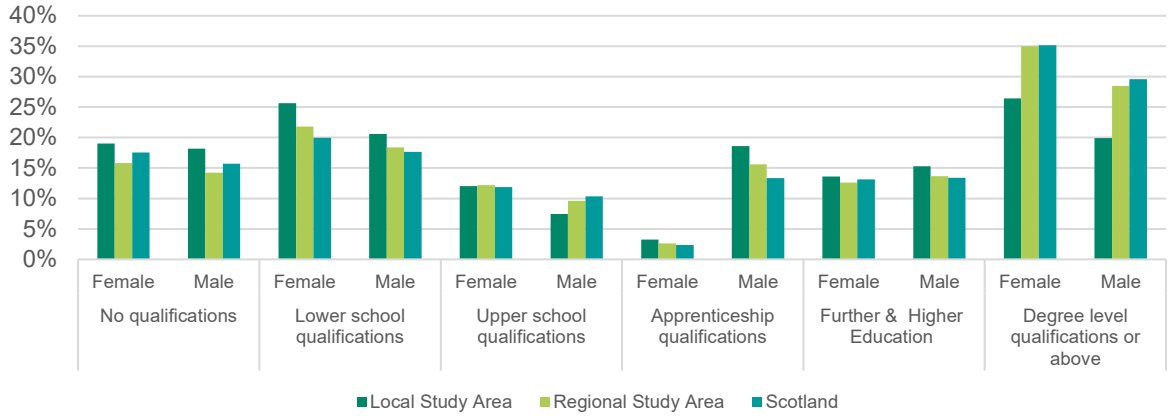
The Scottish Census provides data on health indicators of Scottish residents. Data indicates that self-reported health is broadly similar across the local, regional, and national study area, with just under half of residents in each area describing their health as “very good” (47.1%, 49.1%, and 48.0% respectively). The local and regional study areas have a lower proportion of the population reporting “bad” or “very bad” health compared to Scotland as a whole. This suggests health perceptions in the local and regional study areas are in line with, or slightly better than, national patterns. In terms of long-term health conditions of the region, Aberdeenshire and Highland exhibit the highest proportion of residents living with long-term illnesses or conditions (31.5%)[11].

2.1.4 Education and skills

Data from the Scottish Census provides insight to the level of attainment and qualifications received for Scottish residents, shown in Figure 5. The local study area has fewer residents with degree-level qualifications (23.2%) and more with no qualifications (18.6%), particularly in Fraserburgh and District, and Peterhead North and Rattray Wards, compared to the regional study area and Scotland. Across all study areas, females are more likely than males to hold degree-level qualifications, but also more likely to have no qualifications, while males are more likely to have apprenticeship qualifications[12].

[11] Scottish Government. (2024). Scottish Health Survey 2023. Available at: https://www.gov.scot/collections/scottish-health-survey/
[12] National Records of Scotland (2022). Scotland’s Census 2022. Available at: www.scotlandscensus.gov.uk

Figure 5 Attainment Level by Study Area and Gender



Insights from the Offshore Wind Industry Council indicate that there are several skills gaps and shortages in the offshore wind industry. These include high level electrical skills, particularly among senior authorised persons; digital skills, such as data analysts/scientists and engineers with an understanding of data analysis and presentation; consenting skills, particularly amongst Statutory Nature Conservation Bodies and regulators, but increasingly within private sector companies; and marine and port-related skills[13].

It states that "*Over the longer-term, anticipated skills shortages include:*

- *Electrical technical and engineering skills (particularly substations, HV and cables);*
- *Project management and ability to manage significant sized projects and multiple contractors;*
- *High level digital specialisms including data analytics, artificial intelligence, robotics, digital engineering/science, machine learning, SCADA related skills, software development;*
- *On and offshore logistics; and*
- *Construction resource for floating wind projects, which are anticipated to require high numbers of people in fabrication and welding*."

In addition, insights suggest that over 60% of the roles in the industry require science, technology, engineering and maths (STEM) skills, highlighting the importance of young people pursuing STEM subjects in education[14].

Challenge 4: Local trends in qualification attainment may present barriers to accessing high-skilled roles in offshore renewables locally, highlighting the importance of targeted skills and training initiatives, specifically in industries and courses that will help address skills shortages in the sector.

Skills Development Scotland publish data on the number of modern apprenticeships starts by local authority. In 2024, the regional study area accounted for 22.3% of Scotland's modern apprenticeship starts in Engineering and Energy courses, with over half (53.4%) of these based in Aberdeenshire. For Construction courses, the area contributed 13.2% of national starts, with the highest share in Highland (46.4%) followed by Aberdeenshire (25.2%). This indicates the local focus on skills development in industries relevant to the offshore renewables and the wider energy sector[15]. This focus on sector-relevant skills is further supported by the provision of Foundation Apprenticeships (FAs) in the area. Aberdeenshire Council is a local provider of FAs and has undertaken research into the programme's effectiveness. Key findings highlight that employers strongly value FAs as meaningful entry routes into employment, particularly in sectors such as engineering, logistics, and construction. However, there remains a gap between student aspirations and available provision. In response, the Council is

[13] Offshore Wind Industry Council (OWIC). (2023). Offshore Wind Skills Intelligence Report 2023. Available at: https://www.owic.org.uk/media/gf5ddwxt/offshore-wind-skills-intelligence-report-2023.pdf
[14] Offshore Wind Industry Council (OWIC). (2023). Offshore Wind Skills Intelligence Report 2023. Available at: https://www.owic.org.uk/media/gf5ddwxt/offshore-wind-skills-intelligence-report-2023.pdf
[15] Skills Development Scotland. (2024). Modern Apprenticeship Starts by Local Authority 2023-24. Available at: https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.skillsdevelopmentscotland.co.uk%2Fmedia%2F1fkcsm5u%2Fmodern-apprenticeship-starts-by-local-authority-2023-24.xlsx&wdOrigin=BROWSELINK

proposing the introduction of a new “Energy Engineering Foundation Pathway Course” to better align education and training with local industry demand[16].

Opportunity 1: Foundation to develop a growing skilled workforce pipeline for the renewables and related industries supply chain.

2.1.5 Barriers to employment and training

In terms of barriers to accessing employment and skills, between 2019 and 2023, the regional study area supported 6,140 participants through the *No One Left Behind* employability programme, accounting for 13.0% of all participants across Scotland. The largest proportion of participants in the regional study area are located in Aberdeenshire (39.5%) indicating strong engagement with the programme at the local level. The main barrier to employment appears to be limited or no work experience, affecting 43.4% of participants in Scotland. This indicates that employability interventions might benefit from prioritising work experience and support for labour market entry[17].

Over the same period, the region also accounted for 9.1% of all participants in the *Fair Start Scotland* service. Of those in the region who entered employment, 68.4% sustained work for at least 3 months, falling to 51.7% at 6 months and 36.0% at 12 months. These retention rates are slightly below the national average, with the highest rates observed in Aberdeen City and the lowest in Moray. This may reflect varying local labour market conditions, or the availability of in-work support[18].

Challenge 5: Limited or no work experience presents a key barrier to employment across Scotland, and employment retention rates in the regional study area are below the national average.

Opportunity 2: Foundation to target employability interventions and support to improve job retention in renewables and related industries.

2.1.6 Economic activity

Table 1 shows economic activity rates by local, regional and national study area. The local and regional study areas have higher economic activity rates (excluding full-time students) than the Scotland average, suggesting an engaged workforce. Of the regional study area, Aberdeenshire has the highest economically active population (61.3%). Economic inactivity across both the local and regional study areas is slightly lower than the national average; however, a greater share of this inactive population is retired. This points to a workforce that is generally active but also reflects an ageing demographic, which may have implications for future labour supply[19].

Table 1 Economic Activity

	Economically Active (excluding full-time students)	Economically Active full-time students	Economically Active (excluding full-time students) - Unemployed	Economically Inactive
Local study area	60.5%	2.4%	1.7%	37.1%
Regional study area	59.2%	3.5%	1.9%	37.3%
Scotland	56.9%	4.0%	1.9%	39.1%

[16] Aberdeenshire Council. (2025). Foundation Apprenticeships.
[17] Scottish Government. (2024). Scotland’s Devolved Employment Services: No One Left Behind Statistical Summary February 2024. Available at: No One Left Behind (Official Statistics in Development) - Scotland's Devolved Employment Services: Statistical Summary February 2024 - gov.scot
[18] Scottish Government. (2025). Scotland’s Devolved Employment Services: Fair Start Scotland Statistical Summary May 2025. Available at: Fair Start Scotland - Scotland's Devolved Employment Services: Fair Start Scotland Statistical Summary May 2025 - gov.scot
[19] National Records of Scotland (2022). *Scotland’s Census 2022*. Available at: www.scotlandscensus.gov.uk

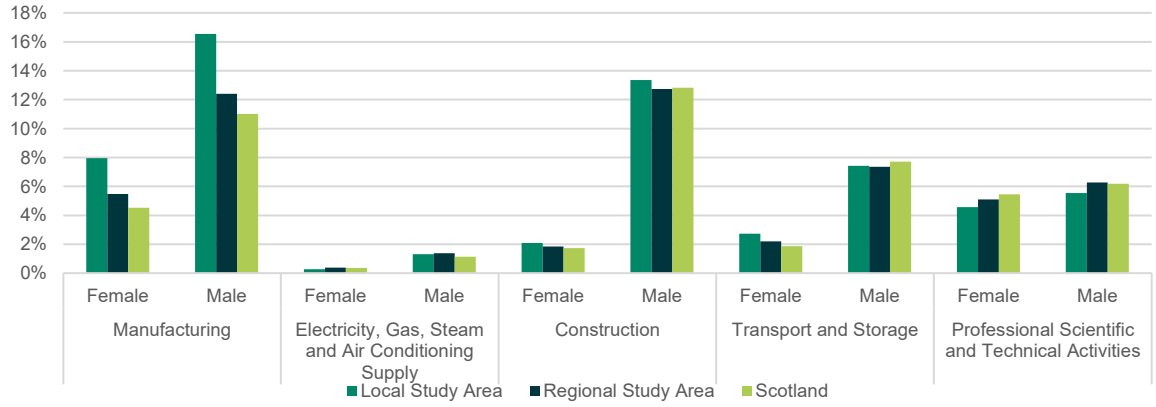
As of May 2025, the claimant count as a proportion of the working-age population is lower in both the local (2.3%) and regional study areas (2.5%) compared to the Scotland average (3.1%). Within the regional study area, Aberdeenshire has the lowest proportion of claimants (1.9%)[20].

Opportunity 3: Evidence of a strong and engaged workforce with favourable labour market conditions locally.

2.1.7 Employment

In terms of employment by industry sector and geography (see Figure 6), both the local and regional study areas have a higher proportion of employment compared to Scotland overall in the Manufacturing (12.5% and 9.1% vs 7.8%), Construction (8.0% and 7.5% vs 7.4%), and Transport / Logistics (5.2% and 4.9% vs 4.8%) sectors. Employment in the electricity sector was broadly similar across all geographies (c. 0.8%). This highlights the alignment of the study areas employment base with relevant sectors in the offshore renewables supply chain. Employment in traditionally male-dominated sectors including Manufacturing, Construction, and Transport / Logistics remains skewed towards males across all study areas, with the widest gender gaps seen in the local study area compared to other geographies. In contrast, the Electricity sector and the Professional, Scientific, and Technical sector shows a more balanced gender distribution across geographies[21].

Figure 6 Employment by Industry and Geography



Opportunity 4: The local employment base is aligned with sectors associated with renewables and related industries.

Challenge 6: Workforce may require reskilling and adaptation to meet specific demands of offshore wind.

2.1.8 Businesses

The regional study area has a well-developed industrial base and supply chain with potential to support some key offshore renewable activities. This is evidenced by the greater presence of large employers (businesses with 250+ employees) in key sectors such as Electricity (19.6% vs 1.9%) and Manufacturing (5.8% vs 2.6%), as well as higher shares in Construction (1.1% vs 0.5%) and Transport / Logistics (6.9% vs 2.5%). More generally, within the regional study area, Aberdeenshire accounts for the largest count of all Manufacturing sector enterprises (38.8%), Electricity sector industries (55.8%), and Professional, Scientific, and Technical sector industries (39.0%). This highlights the regional study area's strengths in infrastructure-heavy, energy and energy-adjacent industries[22].

2.1.9 GVA

These sectoral strengths are further reflected in the region's economic output. The Production sector accounts for 25.1% of total Gross Value Added (GVA) in the regional study area, substantially above the Scotland average of 16.4%. This higher reliance on production-based activity suggests a more

[20] National Records of Scotland (2022). *Scotland's Census 2022*. Available at: www.scotlandscensus.gov.uk
[21] National Records of Scotland (2022). *Scotland's Census 2022*. Available at: www.scotlandscensus.gov.uk
[22] Scottish Government. (2024). Businesses in Scotland: 2024. Available at: https://www.gov.scot/publications/businesses-in-scotland-2024/pages/introduction/

industrial based economy, which is well aligned with the requirements of offshore renewables development, including fabrication, engineering, and logistics support[23].

2.1.10 Travel to work patterns

In the local study area, 25.5% of employed people mainly work from home, which is lower than the regional study area (28.7%) and Scotland overall (31.6%). Commuting patterns show that a larger share of workers in the local study area travel shorter distances under 2 km (12.2%) compared to the regional study area (11.4%) and Scotland (8.6%). Albeit simultaneously, the local study area also has a higher proportion of workers traveling longer distances of 20km to over 60km (total of 19.6%) compared to a total of 11.4% in the regional study area, and a total of 9.6% nationally[24]. These patterns indicate that the labour market within which MarramWind will operate is characterised by both local containment and regional connectivity. This implies that MarramWind has the potential to draw on both local labour and a wider regional skills base, supporting access to employment opportunities.

Opportunity 5: Evidence of a dispersed local labour market from which the renewables and related industries draw to create local employment opportunities.

2.2 Local infrastructure and access profile

2.2.1 Housing

Home ownership is higher in both the local (71.4%) and regional study areas (66.3%) compared to Scotland (63.2%), while the local study area has the lowest proportion of social rented (18.5%) and private rented housing (8.6%)[25].

Average house prices in 2024 in the regional study area were lower than the national average (£214,885 vs £225,647 respectively) and have shown a much slower growth rate over the last decade (13.7%) compared to Scotland overall (37.3%). This indicates moderate growth overall, although this is shaped by diverging local trends. Highland and Moray experienced the strongest growth, with mean property prices increasing by 43.6% and 44.7% respectively. Aberdeenshire has experienced a modest increase of 1.9%, whereas Aberdeen City saw a significant decline in average property prices, falling by 17.4% over the 10-year period[26].

Challenge 7: Housing deprivation indicated by potential challenges in availability of rented tenure properties and slower local house price growth compared to the national average.

2.2.2 Local & regional infrastructure

Table 2 provides a high-level summary of selected infrastructure, facilities, and services within the local and regional study area. It is not an exhaustive inventory, and includes examples such as transport connections, education and training institutions, and community facilities that support local economic activity and wellbeing. The selection was made based on the outcomes listed in the Aberdeenshire Charter for Energy Development.

[23] Office for National Statistics. (2025). *Regional Gross Value Added.* Available at: https://www.ons.gov.uk/economy/grossdomesticproductgdp/datasets/regionalgrossvalueaddedbalancedbyindustrylocalauthoritiesbyitl1region
[24] National Records of Scotland (2022). *Scotland's Census 2022*. Available at: www.scotlandscensus.gov.uk
[25] National Records of Scotland (2022). *Scotland's Census 2022*. Available at: www.scotlandscensus.gov.uk
[26] Registers of Scotland. (2025). *House Price Statistics May 2025.* Available at: https://www.ros.gov.uk/data-and-statistics/property-market-statistics/house-price-statistics

Table 2 Local & Regional Infrastructure

Infrastructure	Example	
Public / Private Services	NHS Grampian and NHS Highland - health boards covering the impact areas. Police Scotland, Scottish Ambulance, and Scottish Fire & Rescue – HQs in Aberdeen and Inverness	Network of multi-use community facilities - including libraries, leisure centres, and community hubs.
Skills Ecosystem	Robert Gordon University University of Aberdeen North East Scotland College (NESCol) Moray College UHI University of the Highlands and Islands	Net Zero Technology Centre Skills Development Scotland (incl. site in Peterhead) Highlands and Islands Enterprise Energy Skills Partnership (ESP) Local schools and colleges
Access	Port of Aberdeen Port of Nigg, Port of Cromarty and Ardersier	Peterhead Port, Fraserburgh Harbour and Buckie Harbour A96, A9, and A90 Aberdeen Western Peripheral Route

Opportunity 6: The regional study area benefits from existing infrastructure, and a robust skills ecosystem with key assets including educational institutions and skills partnerships.

2.3 Summary

The following summary lists key points covered in this chapter with the aim of highlighting those of most relevance to informing the recommendations of the SEAP.

Sector Alignment: Both the local and regional study areas show higher employment in sectors such as Manufacturing, Construction, and Transport / Logistics compared to Scotland overall, indicating alignment with relevant sectors associated with offshore renewables development. Employment in traditionally male-dominated sectors including Manufacturing, Construction, and Transport / Logistics remains skewed towards males across all study areas.

Workforce Potential: While economic activity is higher than the national average, the local study area has lower levels of degree-level qualifications and higher proportions of residents with no qualifications. However, apprenticeship uptake in energy and engineering across the regional study area, over half of which is based in Aberdeenshire (53.4%), points to a growing skills pipeline. This is supported by regional education providers and initiatives such as Aberdeenshire Council's proposed Energy Engineering Foundation Pathway.

Skills Shortages: Industry insights detail the key skills shortages in offshore wind, particularly in high-level electrical engineering, digital specialisms, project management, and marine logistics (with over 60% roles requiring STEM skills).

Industrial Base & Capacity: The regional study area has a more production-focused economy (25.1% of GVA vs 16.4% in Scotland) and a higher share of large employers in energy aligned sectors. Aberdeenshire leads in business counts across key sectors (all sizes) including manufacturing, electricity, and professional, scientific and technical – highlighting strong potential to support offshore renewables and supply chain growth.

Existing Infrastructure & Access: The area benefits from existing infrastructure including port access, road transport routes (A96, A90), and a robust skills ecosystem.

Community Investment: 12.2% of residents in the regional study area live in the most deprived areas, with highest deprivation in access to services, crime, and housing. These factors highlight opportunities for targeted community benefits.

3. Supply chain capability

The following Chapter provides a representative overview and assessment of current supply chain capabilities in Scotland with a particular focus on the regional study area of the Northeast (Aberdeen City, Aberdeenshire, Moray and Highland), where some of the activities associated with the construction and operations of MarramWind are anticipated to take place. The Chapter also reflects on the capabilities of Small and Medium Enterprises (SMEs), which represent the majority of businesses and private sector employment.[27] The assessment includes an overview of companies, infrastructure and facilities that have a high potential to play a role in the development, construction and operation of MarramWind. Advanced proposals for future supply chain facilities are also considered as part of the assessment; however, it does not seek to account for every facility that may or may not come online ahead of MarramWind's construction nor every company that may or may not choose to diversify into offshore wind in the future. The assessment covers suppliers located in Scotland and the SEAP study areas and is structured around the SCDS categories, which are:

- Development and project management
- Manufacturing and fabrication
- Installation, and
- Operations

This section also highlights opportunities for the regional and local study areas, with recommendations to increase regional and local involvement in the supply chain and maximise the socio-economic impact of MarramWind.

The findings of the supply chain assessment are also compared with the Supply Chain Development Statement (SCDS) submitted to Crown Estate Scotland by MarramWind Ltd in 2023.[28] The SCDS sets out MarramWind's supply chain commitments and ambitions for Scotland, the rest of the UK, Europe and elsewhere.

3.1 Approach to supply chain mapping

The supply chain mapping exercise categorises companies across the SCDS categories. For each company, the following has been assessed:

- Capability, defined as existing (a current supplier to the sector) or possible (a suppliers with investment plans but not yet active in the sector).
- Experience, defined as established (proven offshore wind track record) or potential (relevant expertise from other sectors but limited direct offshore wind experience).
- Value, defined as major (capable of fulfilling contracts worth £1 million or more) or minor (contracts below £1 million).
- Location of the supplier, as defined by Scottish local authority areas.
- Scottish Index of Multiple Deprivation (SIMD) decile rank for the location in which the supplier is based.

These metrics were chosen to build an understanding of where opportunities exist in the project study areas, and which areas could generate the greatest socioeconomic benefit. The SIMD index was specifically included because targeting companies in deprived areas can stimulate economic growth and resilience. For this analysis, eligible deprived areas are defined as those within deciles 1–5, or have an access domain score in deciles 1–2, in line with the Clean Industry Bonus Framework[29], which identifies opportunities arising from investing in these areas to strengthen the supply chain, create skilled jobs, and drive economic growth within the offshore wind sector.

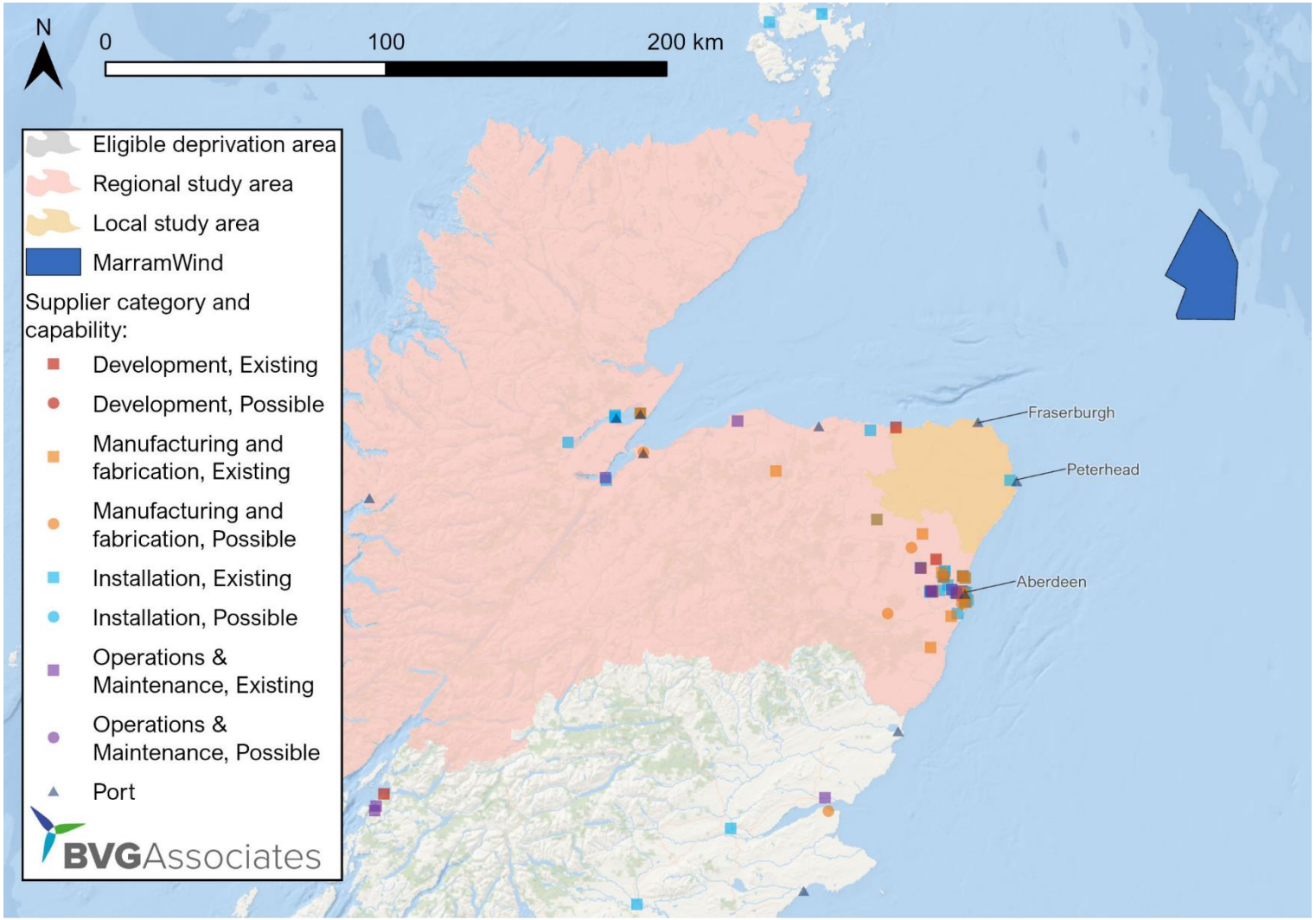
[27] Scottish Government (2021). Rural Scotland Key Facts 2021. Available at: Rural Scotland Key Facts 2021 - gov.scot
[28] MarramWind (2023). MarramWind SCDS Outlook Update. April 2023. Available at: marramwind-scds-outlook-july-2023-update.pdf
[29] Department for Energy Security and Net Zero. (2025). *Contracts for Difference Scheme for Renewable Electricity Generation.* Available at: https://assets.publishing.service.gov.uk/media/67910467cf977e4bf9a2f17e/cfd-clean-industry-bonus-allocation-framework-corrected-22012025.pdf

In some cases, particularly where floating wind technology differs materially from fixed wind, the scope of work that suppliers can realistically deliver remains uncertain. This may reflect technical challenges or limits on the level of risk suppliers are able to take on. Any assessment regarding the experience and capability of existing or potential suppliers may evolve and be reflective of changes in the wider supply chain and investment decisions.

Figure 7 shows Scotland's offshore supply chain capability by relevant supplier category and capability. The map also indicates the top 50% most deprived areas in Scotland, according to the Scottish Index of Multiple Deprivation.[30] The map distinguishes between manufacturing and fabrication, installation, operations and maintenance, and ports. It also shows some of the existing suppliers to the offshore wind industry, and potential suppliers with advanced investment plans, who are not yet active in the industry and / or project study area. Descriptions of these categories are provided later on in this Chapter.

[30] Scottish Index of Multiple Deprivation 2020, Scottish Government 2020, available at; https://www.gov.scot/collections/scottish-index-of-multiple-deprivation-2020/

Figure 7 An illustration of Scotland's offshore supply chain capability and top 50% deprived areas. [31]



[31] This is a representative illustration and does not capture all companies with existing or potential offshore wind experience.

An assessment has been undertaken of each supply chain category structured around the SCDS categories to identify strengths in offshore wind, considering both current and potential suppliers, and by location. Scoring is based on a 1-4 scale for the following criteria, which is defined further in **Appendix A**:

- Supply track record across Scotland including the Northeast: to what extent Scottish-based companies have supplied to the offshore renewables industry to date
- Supply chain and technology maturity: how well-developed the global supply chain is. Low maturity of a global supply chain is given a high score as it represents a potential market entry opportunity for Scottish companies.
- Market readiness of suppliers for commercial scale projects: how ready supply chain companies are to provides goods / services to large-scale projects 1GW and above (as opposed to demonstration projects) via existing facilities or advanced plans for new facilities.
- Relevance to other Scottish supply chains: how strong Scotland's core expertise is and the synergy with the aligned sectors where Scotland has strengths.
- Logic of Scottish supply: includes intrinsic strengths deriving from the location, such as the size of potential work forces available and the distance to the projects in question.
- Scottish investment risk: the risks to investment in Scotland. They may either be generic (applying also to investments made in other countries) or specific to Scotland. Considers the size of investment and the lead time for the first returns on that investment.

Companies included in this assessment are located across Scotland. Where suppliers are located in the study areas for the project, this is highlighted, covering the local authority areas of Aberdeen City, Aberdeenshire, Moray and Highland. However, it should be noted that across all 131 suppliers and ports identified, only 1 supplier (MacDuff Ship Design offering engineering and consultancy), and 2 ports (Peterhead and Fraserburgh) are located in the local study area. It is recognised that this list of suppliers will continue to evolve.

3.1.1 Key data inputs

Where available, references are provided to support the assessment. Additionally, the assessment is based on the expertise of BVGA's technology leads covering the breadth of the supply chain and based on years of experience of working with various clients including:

- Scottish Enterprise and Highlands and Islands Enterprise
- Crown Estate Scotland
- The Scottish Government's Marine Directorate Developers of Scottish floating projects (Flotation Energy, Equinor, Copenhagen Offshore Partners, SSE Renewables)
- Developers of Scottish fixed projects (Ocean Winds, ScottishPower Renewables, Red Rock Power, SSE Renewables).

Companies were selected to provide a representative overview of the supply chain. The study is representative of the regional and Scottish supply chain and is intended to highlight where social action could take place. It is not intended to be an exhaustive list of all suppliers that do or could participate in the supply chain.

3.2 Supply chain assessment

3.2.1 Development

Summary

Development and project management covers activities prior to financial investment decision and the management of the construction up to project commissioning. Specific activities include environmental impact assessments, offshore and onshore surveying work, legal and financial services, and engineering design. The regional study area has considerable expertise in development

and project management, with a number of established suppliers such as Kent, Wood, Xodus, Apollo and Aker Solutions for engineering and consultancy, and CMS, Pinsent Masons, Burness Paull, and Shepherd and Wedderburn for legal services.

Scotland has strong expertise in the development phase across legal services, environmental surveys, and engineering and consultancy. Development services have been successfully provided to commercial scale offshore wind projects by Scottish suppliers and the Northeast's oil and gas supply chain provides a strong basis for cross-sector services such as geotechnical and geophysical surveying, and engineering design of components such as mooring systems. Larger firms, particularly in engineering and consultancy, typically secure the major contracts, while environmental survey providers are generally smaller and focus on specialist packages (e.g, bird and mammal surveys).

In the regional study area, most companies in engineering, consultancy, and legal services are larger firms with offices in Aberdeen City. SMEs in the regional study area are mainly active in environmental surveys, offering services related to subsea support, equipment provision, and ecology surveys, and are generally capable of delivering smaller-sized contracts of £1 million or less. There is also potential for SMEs to support larger firms through subcontracting on engineering and consultancy contracts.

Of the 32 identified key suppliers for the development stage, the majority are large businesses and only 10 are SMEs with fewer than 250 employees of which 7 alone undertake environmental surveys. There was no SME identified amongst legal service suppliers, and only 3 of the 12 suppliers undertaking engineering and consultancy services are SMEs, thus being largely dominated by larger businesses.

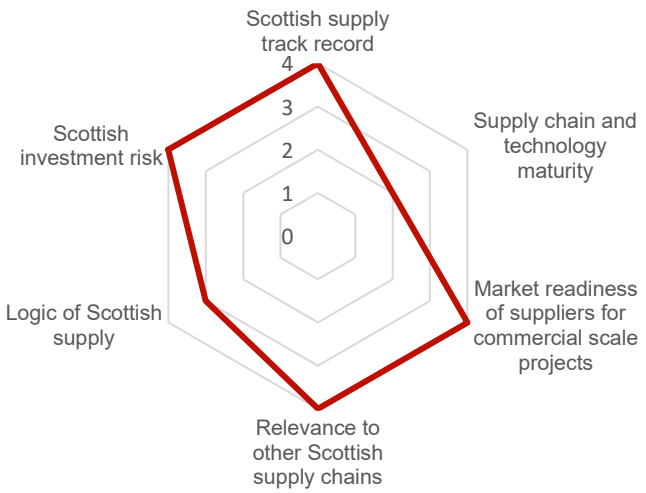
Our assessment for development for Scotland, based on the scoring criteria listed in the approach section, is shown in Figure 8 and considers:

- **Supply track record:** Scottish capability with considerable success in offshore wind
- **Investment risk:** No need for investment in Scotland or only a need for a single commercial scale order in the market.
- **Market readiness:** Two or more companies have existing capacity that will enable them to supply a commercial scale project.
- **Relevance to other supply chains:** Scotland has world class expertise in sectors analogous to offshore renewable energy that can be readily exploited or is already applying significant expertise to the market.

Furthermore, there is a good **logic for Scottish supply** to Scottish projects.

With regards to **supply chain and technology maturity,** the services are deployed at utility scale, but the supply chain is still developing.

Figure 8 Summary of assessment for development.



Opportunity 7: The Regional study area has considerable expertise in development and project management, with a number of established suppliers such as Kent, Wood, Xodus, Apollo and Aker Solutions providing engineering and consultancy, and CMS, Pinsent Masons, Burness Paull, and Shepherd and Wedderburn providing legal services.

Challenge 8: Larger firms dominate engineering, consultancy and legal contracts, while SMEs are mainly active in specialist environmental survey work. SMEs typically deliver smaller contracts (<£1m) or act as subcontractors to larger firm and consultancy, and CMS, Pinsent Masons, Burness Paull, and Shepherd and Wedderburn for legal services.

Legal services

Legal Services are unlikely to provide an opportunity to support further supply chain development of as these services are largely delivered in-house by ScottishPower to MarramWind Ltd. However, for completeness, Scotland has several leading legal firms with experience of working on offshore wind, including CMS, Pinsent Masons, Burness Paull, Womble Bond Dickinson, Eversheds, Burgess Salmon and Shepherd and Wedderburn. These all have offices within the regional study area (Aberdeen City) but it is likely that much of the expertise is located in Edinburgh or Glasgow offices where their clients are largely based. Burness Paull has an office located in a deprived area (Aberdeen City centre).

Environmental surveys and impact assessments

There is limited opportunity to support further supply chain development of environmental surveys and impact assessments, as these services have largely been contracted by MarramWind Ltd already. However, for completeness, Scotland has numerous environmental survey and consultancies. Regional expertise (e.g. Sulmara) is mainly in offshore surveying, although consultancy expertise is typically based in Edinburgh or Glasgow. Consultancy work is largely undertaken within companies based on expertise rather than location, and environmental impact assessments (EIAs) will often be undertaken by teams across UK offices. Survey companies with a base in the regional area include ERM, RPS, Fugro, Ashtead Technology, GEOxyz, DNV, and Sulmara. Of these, three are based on deprived areas.

Engineering and project management

There may be significant detailed design and engineering work needed post-consent providing a potential opportunity for relevant consultancy services. Scotland has a strong engineering base, with significant expertise in the regional study area, particularly due to companies with historical links to

the oil and gas industry. Those with a regional presence include Kent, Wood Group, Xodus, Apollo, Oceaneering and Aker Solutions. Of these, Xodus is located in a deprived area. MacDuff Ship Design is the only supplier across all companies identified by this supply chain mapping exercise that is based in the local study area.

3.2.2 Manufacturing and fabrication

Summary

Manufacturing covers the production of components for the wind farm, including the turbine, floating substructure and associated mooring system, subsea cables, and electrical infrastructure. This phase has strong potential to deliver economic value, though current capability in Scotland, both in the regional study area and nationally, is limited because of a lack of serial production facilities, limited fabrication sites, a fragmented supply chain (see this section), and privatised ports with more short-term investment strategies in comparison to countries such as Denmark and Germany where ports are publicly owned. Scotland's current capability to deliver major manufacturing contracts is limited. Several prospective suppliers have well-developed investment plans but are not yet active in the sector. Proposed new facilities are typically located near ports, including the Port of Nigg, Arnish, and Hunterston, and are generally operated by large companies.

In the regional study area, the manufacturing base is mostly comprised of larger companies, for example Sumitomo at Port of Nigg. SMEs in the regional study area are more active in floating substructures and mooring system services. Most of these businesses are based in the Aberdeen City Council area, although they currently have limited direct experience in floating offshore wind manufacturing. There are notable numbers of suppliers based in deprived areas, increasing potential to maximise the socio-economic value of fulfilling a contract. However, most of these are not within the regional study area. Suppliers located within the regional study area include Global Energy Group, Sumitomo Electric, Axis Energy Projects and Mooreast.

There are 22 identified suppliers for manufacturing and fabrication in Scotland. Of these, XLCC and Cable Solutions Worldwide (both located within the regional study area) are the only SME suppliers for cables with the remaining 4 being larger suppliers. In terms of suppliers for floating substructures BW Ideol are an SME, located in the regional study area. The manufacturing of mooring systems is dominated by SMEs – 4 out of 6 suppliers in Scotland employ fewer than 250 staff. All 4 SMEs that manufacture mooring systems are located in the regional study area (Axis Energy Projects, Mooreast, First Marine Solutions, Subsea Micropiles).

Challenge 9: Scotland lacks serial production facilities, has a fragmented supply chain, and ports are privatised. Within the regional study area, SMEs are primarily active in mooring systems (e.g. Axis Energy Projects, Mooreast, First Marine Solutions, Subsea Micropiles), while cable manufacturing is dominated by larger firms such Sumitomo Electric.

Turbine

Our assessment for turbine supply for Scotland is shown in Figure 9 and illustrates:

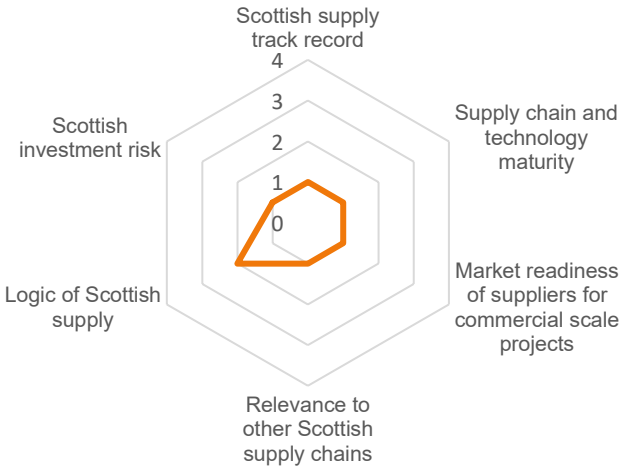
- Limited **logic for Scottish supply** to Scottish projects. Figure 9
- **Supply track record:** No current Scottish capability.
- **Investment risk:** Investments in Scotland can only be made with long-term confidence in the market and with public sector financial support.
- **Market readiness:** Existing capacity or investment plans are at an early stage.
- **Relevance to other supply chains:** Scotland has no significant industrial expertise.
- **Supply chain and technology maturity:** Global supply chain mature.

In summary, Scotland has limited expertise in this category. There are relatively few turbine suppliers and manufacturing locations globally, with the early-movers in the market in continental Europe establishing market share. While local manufacturers may have limited justification just to serve

Scottish projects, opportunities exist to serve other offshore wind markets in the UK and Europe. Tower manufacturing has some synergies with Scotland's manufacturing base, but high volume-low margin production, high competition and low pipeline visibility makes it a significant risk for investment.

Turbine manufacture likely provides little to no opportunity for SME involvement without new manufacturing facilities being established. Turbine suppliers source components from their global supply chains that are not dependent on the eventual locations of the turbines.

Figure 9 Summary of assessment for turbine.



Scotland has not featured in the offshore wind supply chain since CS Wind ceased tower production at Campbeltown in 2021. Between 2021 and 2022, Global Energy Group explored an unsuccessful joint venture with Haizea at Nigg (regional study area) for tower production[32] and we understand that under its new ownership it is still potentially interested in developing the Nigg site for manufacturing.

Scott & Fyfe, based in Tayport, Fife (categorised as a deprived area although outside the regional study area), produces composite textiles which could have an application in nacelle and hub cover production. However, an entry to the market is likely to be dependent on investment in nacelle production in Scotland, which is dependent on more certainty around timelines and demand.

In summary, whilst there is potential for some Scottish expenditure on the manufacturing of wind turbines, a high level of spend is unlikely to be feasible given Scotland has limited prospect of producing steel plate for towers or producing fibres, resins and coatings for blades. Any commitment to Scottish expenditure is only likely to be realised if expertise is developed following the realisation of investment plans, and if suppliers are not already committed to other projects. Scott and Fyfe for example supply material composites, which have an application in nacelle and hub cover production. Developing expertise will depend on investments into nacelle production in Scotland. Global Energy Group is developing a manufacturing facility at the Port of Nigg. A further constraint is that UK blades can only be sourced from Siemens Gamesa. This therefore presents a significant constraint to this commitment if Siemens Gamesa were to have no capacity.

Subsea cables

Our assessment for subsea cables for Scotland is shown in Figure 10 and illustrates (in ascending order of scores):

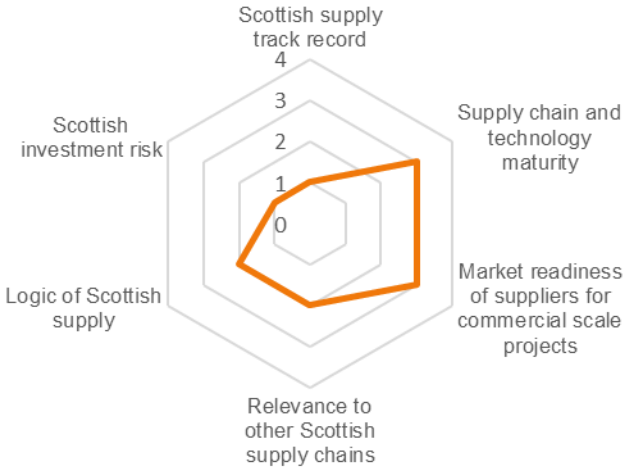
- **Supply track record:** No current Scottish capability
- **Investment risk:** Investments in Scotland can only be made with long-term confidence in the market and with public sector financial support.

[32] Global Energy Group. (2021). *The UK's Largest Offshore Wind Tower Manufacturing Facility to Be Built at Port of Nigg.* Available at: The UK's Largest Offshore Wind Tower Manufacturing Facility to Be Built at Port of Nigg - Global Energy Group

- Limited **logic for Scottish supply** to Scottish projects. Figure 9
- **Relevance to other supply chains:** Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector
- **Market readiness:** One company has either existing capacity or has made the final investment decision on an investment in new capacity that will enable it to supply a commercial scale project
- **Supply chain and technology maturity:** Global mature supply chain for export cables but dynamic inter array cables deployed at demonstration scale only

Overall, however, this is a significant area of opportunity to capture economic benefits in the study area. The £350 million investment by Sumitomo Electric in a new factory at the Port of Nigg[33] is significant, adding to the existing capability at Oceaneering and in lower tier components and services.

Figure 10 Summary of assessment for subsea cables.



Scotland current capability in the subsea cables supply chain is restricted to Balmoral Comtec supply of cable protection and buoyancy systems, which is based in Aberdeen City and thus within the regional study area. This will change following the completion of Sumitomo Electric's new cable factory at Nigg in 2026, which will be able to produce array cables alongside HVDC cable[34].

Oceaneering has the capability to supply dynamic array cables but no track record as of 2025 in offshore wind, although was recently awarded funding to expand its Rosyth location to support its offshore wind dynamic cable qualification projects[35]. XLCC has announced plans to build an HVDC cable production facility at Hunterston[36] but no investment decision has been made to date. Hydro Group manufacturers subsea power cable connectors. Of these suppliers, the Sumitomo, XLCC, Balmoral Comtec, Hydro Group and Oceaneering facilities are located in deprived areas. All of these are located in the regional study area, with the exception of XLCC.

Overall, whilst Scotland does not yet have a fully operational large-scale export cable manufacturing facility, any planned Scottish expenditure depends on the realisation of the above-mentioned developments. For dynamic inter-array cables specifically, capacity and availability are likely to be the main drivers that will determine whether Scottish spend is feasible.

[33] National Grid. (2025). *National Grid selects Sumitomo Electric Industries, Ltd. as preferred subsea cable supplier for Sea Link project.* Available at: https://www.nationalgrid.com/media-centre/press-releases/National-Grid-selects-Sumitomo-Electric-for-Sea-Link-project
[34] Offshore Wind Scotland. (2024). *Sumitomo Electric cable factory ground breaking ceremony at Nigg.* Available at : https://www.offshorewindscotland.org.uk/news/2024/may/14/sumitomo-electric-cable-factory-ground-breaking-ceremony/
[35] Oceaneering. (2025). *Oceaneering Awarded Scottish Enterprise Funding for Rosyth Cable Manufacturing Facility.* Available at: https://www.oceaneering.com/oceaneering-awarded-scottish-enterprise-funding-for-rosyth-cable-manufacturing-facility/
[36] XLCC and RPS (2022). *Environmental Impact Assessment Report | Chapter 2 Project Description.* Available at: https://www.xlcc.co.uk/files/uploads/EIA-Report-Chapter-2-Project-Description.pdf

Floating substructures

Our assessment for floating substructures for Scotland is shown in Figure 11 and illustrates (in ascending order of scores):

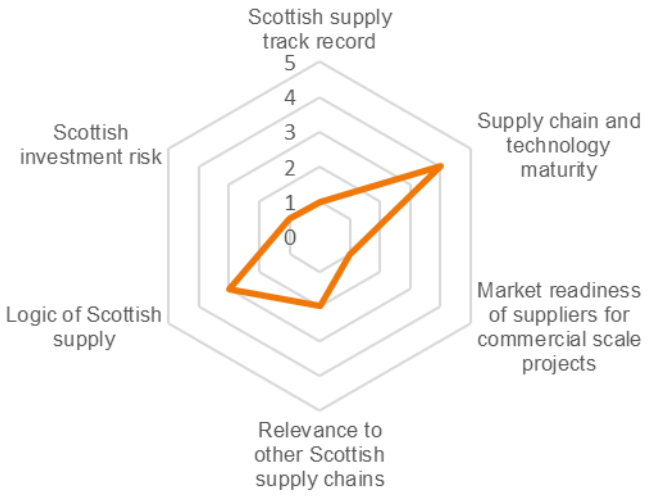
- **Supply track record:** No current Scottish capability.
- **Investment risk:** Investments in Scotland can only be made with long-term confidence in the market and with public sector financial support.
- Limited **logic for Scottish supply** to Scottish projects.
- **Relevance to other supply chains:** Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector.
- **Market readiness:** No established supply chain for concrete substructures resulting in limited existing capacity or investment plans being at an early stage.
- **Supply chain and technology maturity:** Technology deployed but at demonstration scale only.

This is a new area of the supply chain so there is limited track record and as identified by Renewable UK's 2024 Offshore Wind Industrial Growth Plan, manufacturing capacity for floating foundations is immature and fragmented. [37] For steel substructures, there is a logical case for fabrication and assembly in Scotland, given the existing expertise in offshore engineering. However, investment risk remains high due to strong competition from low-cost fabrication countries, such as Spain. As a result, the greatest opportunity lies in local assembly rather than full fabrication.

There are synergies with Scotland's historical expertise in fabricating offshore structures from oil and gas, but this was also true for fixed foundations and there has not been a compelling case for investment in Scotland due to lack of confidence in the market in the past. It is uncertain whether this will change.

For concrete substructures, there is increased rationale for Scottish supply and relevance to other Scottish supply chains than for steel substructures. Scotland benefits from established expertise in concrete production and civil engineering across other sectors and also has ports with available space and heavy-lift capacity suitable for large-scale fabrication. However, the floating offshore wind industry has so far been dominated by steel-based designs, which is also where Scotland's primary experience currently lies. At present, there are no established concrete substructure manufacturing facilities in Scotland.

Figure 11 Summary of assessment for floating substructures.



[37] Renewable UK. (2024). *2024 Offshore-wind-industrial-growth-plan.* Available at: https://www.renewableuk.com/media/rqvlqzu0/offshore-wind-industrial-growth-plan.pdf

Potential tier 1 substructure steel suppliers are Babcock International, Navantia UK, and Global Energy Group (fabrication capability in the regional study area). Both Global Energy Group and Navantia are located in deprived areas.

There are also potential options for substructure assembly, through Ocean Kinetics, Ferguson Marine, and Lerwick Engineering and Fabrication, but none are local. All operate from deprived areas.

For concrete substructures, BW Ideol plans to manufacture its concrete barge-type floaters at Ardersier Port.[38] Other ports, including Hunterston PARC, Kishorn Port, and the Port of Cromarty Firth, have been identified as high-potential future manufacturing hubs for concrete floating foundations due to their suitable infrastructure and port capacity. However, no confirmed agreements are yet in place. In the short term, Scottish involvement in concrete substructures is more likely to come from material supply (e.g., aggregates from Aggregate Industries' Glensanda Quarry) and civil engineering support services similar to those used for onshore substation construction.

For secondary steel supply, there are a number of regionally based companies. This includes for example, Forsyth's, TEXO Engineering and Fabrication, Denholm Engineering, AJT Engineering and Harper UK.

In summary, there is experience in floating steel substructures within the regional study area and the rest of Scotland, but the supply chain for concrete substructures is more limited. Thus, whilst in principle a high level of Scottish spend could be invested in these areas as these represent a major proportion of the cost of a Scottish offshore wind farm project, there are challenges with enabling this.

Mooring system

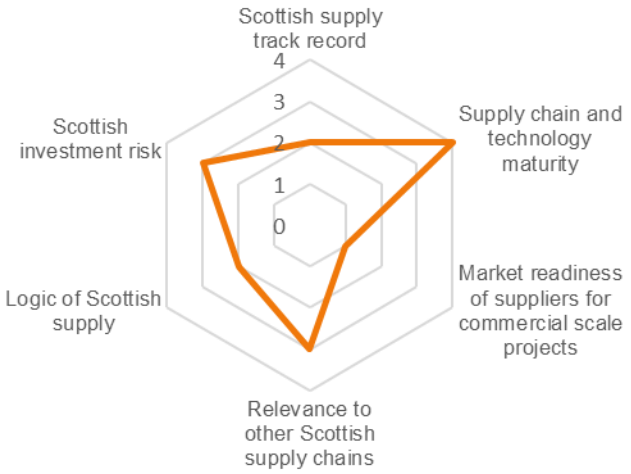
Our assessment for mooring system for Scotland is shown in Figure 12 Summary of assessment for mooring system. and illustrates (in ascending order of scores):

- **Market readiness:** Existing capacity or investment plans are not in existence or are at an early stage.
- There is limited **logic for Scottish supply** to Scottish projects.
- **Supply track record:** Scottish capability, but no/limited success in offshore wind – 1 project or multiple in a similar sector.
- **Relevance to other supply chains:** Scotland has strong expertise in relevant parallel sectors but would require a shift in relevant company strategies to enter the offshore renewable energy market.
- **Investment risk:** Investment in Scotland can be triggered by framework contracts or two or more commercial scale orders.
- **Supply chain and technology maturity:** Technology not deployed at full scale, thus providing an opportunity for Scottish suppliers.

There are considerable synergies with the oil and gas sector and Scotland has significant expertise in mooring system engineering. It remains less clear whether Scotland can attract manufacturing investment, and it is unlikely unless there is better visibility of the order pipeline to attract investors.

[38] BW Ideol. 20 September 2021. BW Ideol and Ardersier Port Authority have signed a strategic partnership agreement | Ideol

Figure 12 Summary of assessment for mooring system.



In the regional study area, there are four mooring system suppliers in Acteon, Axis Energy Projects, First Marine Solutions and Mooreast. All are located in deprived areas, except First Marine Solutions.

It is uncertain the extent to which these suppliers would subcontract to Scottish suppliers. There have been no Scottish mooring line production facilities since Bridon-Bekaert closed its Grangemouth facility.[39] The steel fabrication companies listed above for floating substructures are likely to have the potential to manufacture anchors, depending on the design, but they will face strong competition from low-cost countries. Overall whilst the supply chain mapping found a number of large suppliers in Scotland located in the regional study area and with existing capability, a limited number of the suppliers had existing experience in offshore wind.

Significant Scottish expenditure for anchors is expected to be challenging given no suppliers were identified in Scotland. Most large-scale anchor manufacturing is still imported e.g. from Norway, Spain and Asia.

Substations

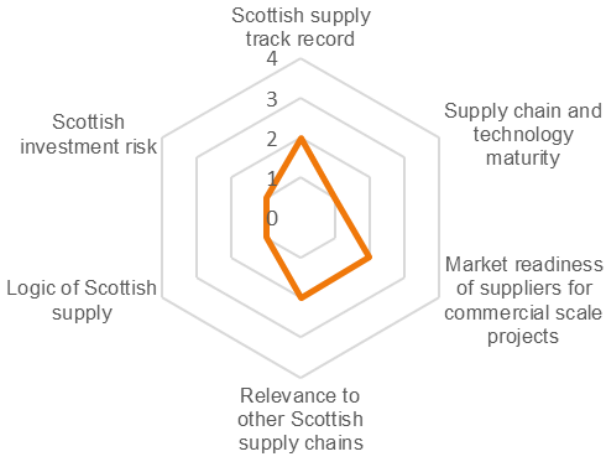
Our assessment for substations for Scotland is shown in Figure 13 and illustrates (in ascending order of scores):

- **Supply chain and technology maturity:** Global supply chain mature.
- **Investment risk:** Investments in Scotland can only be made with long-term confidence in the market and with public sector financial support.
- There is no significant **logic for Scottish supply** to Scottish projects.
- **Supply track record:** Scottish capability, but no/limited success in offshore wind – 1 project or in multiple in a similar sector.
- **Relevance to other supply chains:** Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector.
- **Market readiness:** Companies have investment plans that are pending final investment decision, which would enable them to supply a commercial scale project.

This is an area of the supply chain where Scotland has some success in terms of securing fixed offshore wind contracts. Babcock International supplied the substation for the Rampion wind farm and the reactive compensation platform for Hornsea One although they have not bid for recent contracts and are not expected to in the future. Despite this, substations represent an important opportunity for the Scottish supply chain because they are high-value components.

[39] The Falkirk Herald. (2025). *Job losses as Grangemouth synthetic rope facility reaches the end of the line.* Available at: https://www.falkirkherald.co.uk/business/job-losses-as-grangemouth-synthetic-rope-facility-reaches-the-end-of-the-line-4958527

Figure 13 Summary of assessment for substations.



In the regional study area, Petrofac in Aberdeen has delivered offshore wind substation contracts and undertakes engineering and project management, with fabrication at its United Arab Emirates yard; however, it has recently entered into administration. Both suppliers are located in a deprived area

Onshore civils work is considered in the section below.

3.2.3 Installation

Summary

Installation covers the construction and commissioning of offshore generation assets, the offshore export system, and the onshore export system. Specific activities include component delivery, vessel operation, component pre-assembly and pre-commissioning, port activities, and offshore logistics. This phase offers significant opportunities to deliver economic value in the regional study area.

Scotland has strong expertise in the installation and commissioning phase, particularly in offshore logistics, heavy-lift operations, subsea engineering, and port services. Larger contractors, many with international reach, are capable of delivering major contracts, while specialist SMEs tend to provide niche services within wider installation packages.

In the regional study area, most capability in installation and commissioning is concentrated among larger firms based in Aberdeen, Peterhead, and Invergordon, including vessel operators, subsea contractors, and port service providers. SMEs are mainly active in supporting roles such as marine logistics, offshore support services, and specialist equipment provision. There are a number of these companies operating from deprived areas in the regional study area.

42 key suppliers were identified in Scotland for the installation and commissioning phase of which 12 are classed as SMEs. These are concentrated in the integration of turbines with 6 SMEs offering this service. WG3 Marine, Global Wind Projects, Ocra Oceanic Systems and Interocean Marine Services are located within the regional study area. A further 4 SMEs are capable of providing offshore installation, and 3 of these businesses are located in the regional study area (Rotech Subsea, PSG Marine & Logistics, Caldive). Of the SMEs identified, only 24 Degrees Renewable and ROVOP (located within the regional study area) provide the installation of onshore cable and onshore substations.

We have summarised our supply chain assessments by combining installation work into turbine integration, offshore installation and onshore works.

Opportunity 8: Scotland has strong expertise in installation and commissioning, particularly in offshore logistics, heavy-lift operations, subsea engineering, and port services. Larger contractors deliver major contracts, while specialist SMEs provide niche services within wider installation packages.

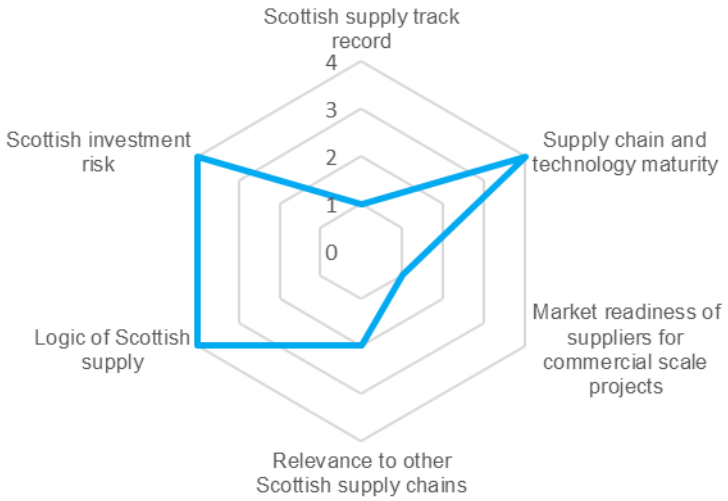
Turbine integration

Our assessment for turbine integration for Scotland is shown in Figure 14 and illustrates (in ascending order of scores):

- **Supply track record:** No current Scottish capability.
- **Market readiness:** Existing capacity or investment plans are not in existence or are at an early stage.
- **Relevance to other supply chains:** Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector
- **Supply chain and technology maturity:** Technology not deployed at full scale
- **Investment risk:** Investment in Scotland can be made with a single commercial scale order in the market.
- **Logic of supply:** There is strong logic for Scottish supply to Scottish projects.

Turbine integration is a new area of the supply chain and there is considerable benefit in undertaking the work locally because of the weather risk of towing and installing the turbine-floating substructure. Scotland has significant experience with onshore heavy lifting, which is needed to construct turbines on the floating substructures. There is a role for companies experienced in onshore turbine installation who may be experienced in heavy lifting or crane services but have not yet applied their expertise to the installation of wind turbines.

Figure 14 Summary of assessment for turbine integration.



Scotland has an extensive number of companies with the capability to undertake turbine integration work. A representative illustration is shown in

Table 3. It includes the heavy lift service providers Sarens PSG as well as crane hire companies Ainscough and Weldex. W3G Marine offers a patented turbine integration approach, which could be a significant source of revenue if it offers costs savings.

Table 3 Scottish companies that can support turbine integration and installation.

Company	Regional	Deprived area
Global Energy Group	Yes	Yes
Sarens PSG	Yes	Yes
Weldex	Yes	Yes
Ainscough Crane Hire	Yes	Yes
Swire Energy Services	Yes	Yes
WG3 Marine	Yes	No
Global Wind Projects	Yes	Yes

Offshore installation

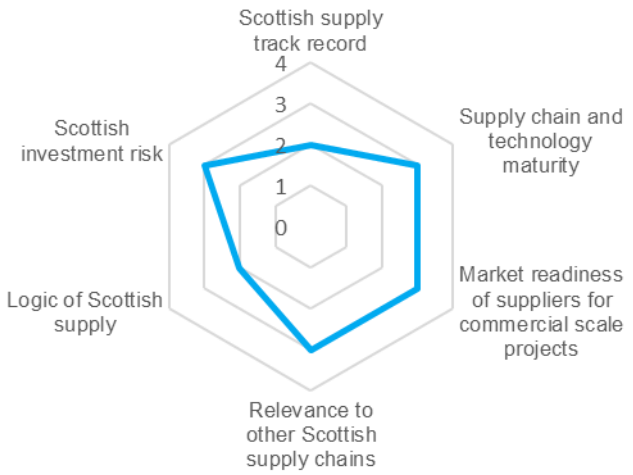
Offshore installation includes all activities related to the installation of mooring systems, turbine structures, subsea cables, and the offshore substation.

Our assessment for offshore installation for Scotland is shown Figure 15 and illustrates (in ascending order of scores):

- There is no significant **logic for Scottish supply** to Scottish projects.
- **Supply track record:** Scottish capability, but no/limited success in offshore wind – 1 project or multiple in a similar sector.
- **Supply chain and technology maturity:** Technology deployed but at demonstration scale only.
- **Investment risk:** Investment in Scotland can be triggered by framework contracts or two or more commercial scale orders.
- **Relevance to other supply chains:** Scotland has strong expertise in relevant parallel sectors but would require a shift in relevant company strategies to enter the offshore renewable energy market.
- **Market readiness:** One company has either existing capacity or has made the final investment decision on an investment in new capacity that will enable it to supply a commercial scale project.

Overall, there is good Scottish capability with many of the vessels and services required being easily transferable from the oil and gas sectors. At the same time, there are many vessel fleets operating out of other European countries and therefore no strong logistical reason exists for choosing a Scottish supplier. While Scotland has proven capability, the market for installation vessels and service operation vessels is already dominated by fleets based in Norway, Denmark, and the Netherlands. These countries operate large, established fleets that regularly serve projects across Northern Europe, including the UK, without significant logistical disadvantage.

Figure 15 Summary of assessment for offshore installation.



A range of companies and capabilities support offshore installation activities from bases in Scotland, particularly around Aberdeen. Several anchor handling tug fleets operate out of the region, including those owned by DOF Subsea, Seaway7, and Vroon.

Mooring installation services are offered by companies such as First Marine Solutions and Interocean Marine Services. The following companies can lead or support in offshore cable installation: Seaway 7, Boskalis Subsea, DeepOcean, Oceaneering, Helix Energy Solutions, Briggs Marine, Rotech Subsea. All are companies located in the regional study area, except Briggs Marine and Oceaneering. DeepOcean, Oceaneering, Helix Energy Solutions, Briggs Marine, Rotech Subsea are located in deprived areas. The regional study area also has cable installation equipment manufacturers in Altrad Sparrows, Caley Ocean Systems and Motive Offshore. Both Altrad Sparrows and Motive Offshore are located in deprived areas.

There is also opportunity for Scottish companies in offshore and vessel support services if investments in specialised vessels are made, the workforce is developed, digital and innovation capabilities are expanded and other factors such as access to finance and government support are addressed. Green Marine and North Sea Logistics (local and in deprived area) currently operate crew transfer vessels capable of supporting a broad range of offshore activities.

There would however be challenges in committing to major Scottish supply, especially in relation to the installation of export cables and array cables given the lack of major suppliers in Scotland.

Onshore cable and onshore substation

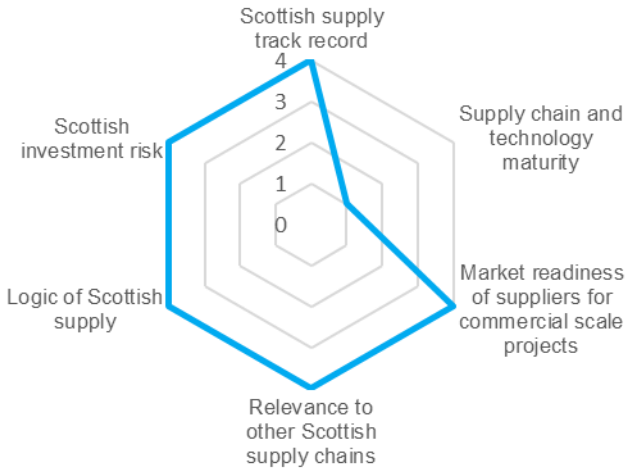
Onshore works include cable and onshore substation installation. Our assessment for onshore works for Scotland is shown in

Figure 16. Scotland has significant capability in this area and there are strong grounds for using Scottish suppliers. Specifically:

- **Supply chain and technology maturity:** Global supply chain is mature.
- **Supply track record:** Scottish capability, with considerable success in offshore wind. More than 3 commercial scale projects supplied in multiple markets and evidence of supply to at least one GW scale project.
- **Market readiness:** Two or more companies have existing capacity or have made the final investment decision on an investment in capacity that will enable them to supply a commercial scale project.
- **Relevance to other supply chains:** Scotland has world class expertise in sectors analogous to offshore renewable energy that can be readily exploited or is already applying significant expertise to the market.

- **Investment risk:** Investment in Scotland is not needed or can be made with a single commercial scale order in the market.
- **Logic of supply:** There is strong logic for Scottish supply to Scottish projects.Figure 9

Figure 16 Summary of assessment for onshore works.



Scotland has a significant number of companies that can fulfil major civil engineering contracts of the kind required by offshore wind projects. These include Balfour Beatty, BAM Nutall, Kelburne Construction, I&H Brown, RJ Macleod, Robertson Group and Careys. Of these, only RJ McLeod has a headquarter in the region. All are based in deprived areas. In the regional study area, OEG can support the onshore pull-in from the cable vessel and is located in a deprived area.

However, any commitment to Scottish expenditure would be dependent on the availability of these large suppliers.

3.2.4 Operations and maintenance

Summary

Operations and maintenance cover any activities from project commissioning to decommissioning. Specific activities include wind farm operation, routine service of offshore and onshore assets, and unplanned maintenance. This phase represents an opportunity for high local involvement and a route to create benefits within the local area, due to the 25 to 35-year time-period of the phase.

Scotland has strong capabilities in the O&M phase, particularly in the regional study area around Aberdeen, where the regions established oil and gas supply chain is increasingly supporting offshore wind projects. Many suppliers in this area can also provide services during installation and are capable of delivering major contracts. In the regional study area, most O&M capability is concentrated among larger companies.

12 key suppliers were identified in Scotland for the O&M phase, of which 4 are classed as SMEs. Rotech Subsea (regional study area) provide Balance of Plant O&M. Not located within the regional study area but classed as SMEs, 1StopWind and Coast Renewable Services undertake O&M of turbines. Moray First Marine (regional study area) provide offshore vessel and logistics.

Ports also represent a key area for delivering significant value. Most of the suitable construction and operational ports in Scotland are located in the region, including Port of Nigg, Cromarty Firth, Ardersier, Port of Aberdeen, Peterhead Port and Fraserburgh Harbour.

Opportunity 9: Scotland has strong O&M capabilities, particularly in the regional study area around Aberdeen, leveraging the established oil and gas supply chain. Ports are a key enabler for O&M, with most suitable construction and operational ports located in the regional study area.

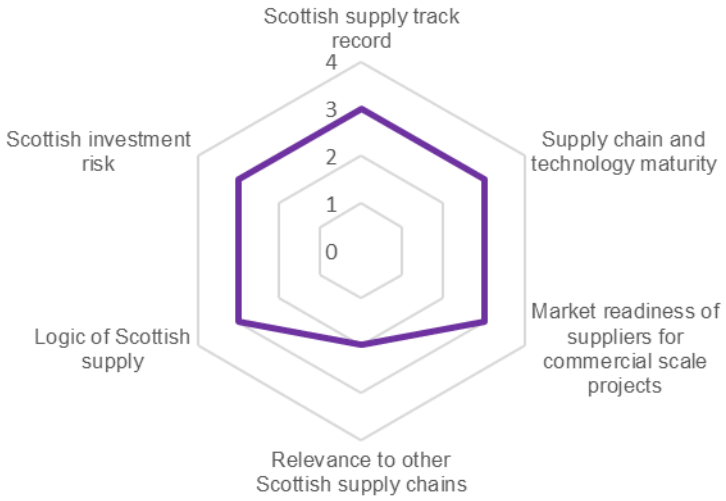
Turbine maintenance

Our assessment for turbine maintenance for Scotland is shown in Figure 17:

- **Relevance to other supply chains:** Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector.
- **Supply chain and technology maturity:** Technology deployed but at demonstration scale only for floating turbines.
- **Supply track record:** Scottish capability, with some/moderate success in offshore wind - 2 commercial scale projects supplied.
- **Market readiness:** One company has either existing capacity or has made the final investment decision on an investment in new capacity that will enable it to supply a commercial scale project.
- **Investment risk:** Investment in Scotland can be triggered by framework contracts or two or more commercial scale orders.
- **Logic of supply:** There is a good logic for Scottish supply to Scottish projects.Figure 9

Routine maintenance will be undertaken locally but for more intermittent services, Scottish companies will need to compete with companies from across Europe such as Denmark, the Netherlands and Germany. There is significant expertise in onshore turbine maintenance but there are barriers to entry. These are due to the technical, regulatory, and financial requirements involved. For example, specialised vessels (e.g., Service Operation Vessels, Crew Transfer Vessels) and equipment are expensive and require high capital investment. Turbines are highly complex, requiring skilled technicians trained in electrical, mechanical, and hydraulic systems. Knowledge of digital monitoring systems and predictive maintenance tools is also increasingly essential.

Figure 17 Summary of assessment for turbine maintenance.



There is some specific capability for offshore turbine maintenance, and this is typically locally based; for example, at Fraserburgh for Moray East and Wick for Beatrice. There are several Scottish companies providing onshore turbine maintenance and there is an opportunity to diversify into

offshore wind, but there are increased costs and would require a major change in technicians working patterns. Onshore technicians can work a standard working day while offshore technicians often work in shifts and for some wind farms work a two week on-two week off pattern. Onshore service companies are typically located outside the regional study area.

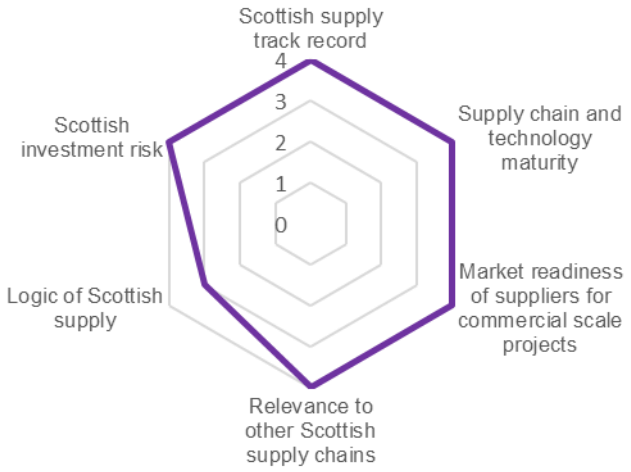
Balance of plant

Our assessment for balance of plant maintenance for Scotland is shown in Figure 18 (in ascending order of scores):

- **Logic of supply:** There is a good logic for Scottish supply to Scottish projects.
- **Supply chain and technology maturity:** Technology not deployed at full scale.
- **Supply track record:** Scottish capability, with considerable success in offshore wind – more than 3 commercial scale projects supplied and multiple markets and evidence of supply to at least one GW scale project.
- **Market readiness:** Two or more companies have existing capacity or have made the final investment decision on an investment in capacity that will enable them to supply a commercial scale project.
- **Relevance to other supply chains:** Scotland has world class expertise in sectors analogous to offshore renewable energy that can be readily exploited or is already applying significant expertise to the market.
- **Investment risk:** Investment in Scotland is not needed or can be made with a single commercial scale order in the market.

Scotland has significant skills from the oil and gas sector and there should be a strong role for Scottish companies. Jifmar and Rotech Subsea (within the region) both have experience in offshore wind. Both are located in deprived areas. The challenge will be that the benefits for local services are limited. This is because the services are periodic, and workers can travel to site from distance. Scottish companies will therefore face competition from across northern Europe.

Figure 18 Summary of assessment for balance of plant maintenance.



Many of the subsea inspection services used in the oil and gas industry such as for the inspection of assets underwater can be directly applied to offshore wind. The local area has strong expertise in this area of the supply chain, with many companies listed for offshore installation above also offering balance of plant maintenance services.

Offshore vessel and logistics

Our assessment for offshore vessel and logistics for Scotland is shown in Figure 19 (in ascending order of scores):

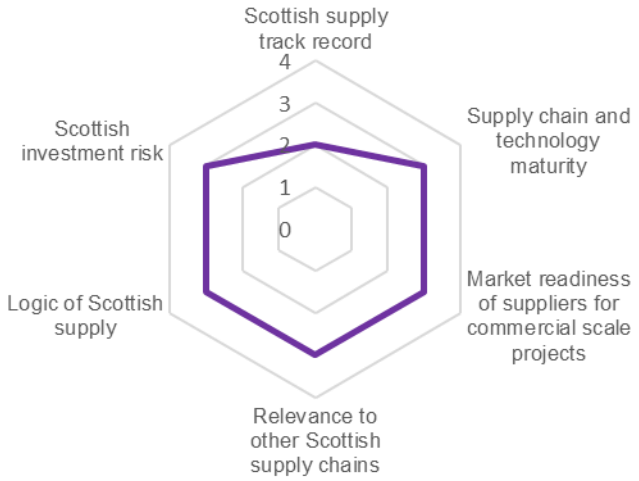
- **Supply track record:** Scottish capability, but no/limited success in offshore wind – 1 project or in multiple in a similar sector.
- **Logic of supply:** There is a good logic for Scottish supply to Scottish projects.
- **Supply chain and technology maturity:** Technology deployed but at demonstration scale only.

- **Market readiness:** One company has either existing capacity or has made the final investment decision on an investment in new capacity that will enable it to supply a commercial scale project.
- **Relevance to other supply chains:** Scotland has strong expertise in relevant parallel sectors but would require a shift in relevant company strategies to enter the offshore renewable energy market.
- **Investment risk:** Investment in Scotland can be triggered by framework contracts or two or more commercial scale orders.

Scotland already has vessels from the oil and gas sector and there is therefore an opportunity for Scottish companies because the requirements are similar. These include North Star Renewables (within in the region), Moray First Marine (within in the region), Aurora Energy (within in the region), Knights Offshore Support and OEG (within in the region). All are located in a deprived area.

Scottish companies will face competition from across northern Europe such as Denmark and Norway. Norway for example has a strong supply chain for vessels and logistics due to expertise from the oil & gas sector that translates into advanced offshore logistics and floating wind support. However, it is likely that even if non-Scottish companies are selected, they will need to develop their local presence.

Figure 19 Summary of assessment for operational vessels and logistics.



In the region, there is a major service operation vessel provider in North Star Shipping. Other operators offering vessels for routine will create a local base if they have not done already (for example Edda Wind for Seagreen at Montrose). The anchor handling vessel operators in the regional study area are listed above, as are crew transfer vessel operators.

3.2.5 Ports

In this section, we provide a high-level overview of some of the available ports in Scotland and the investment needed to meet customer needs. The list of ports to be considered in this report was provided by MarramWind Ltd.

MarramWind will endeavour to use Scottish and UK ports during the construction stage, with an indicative shortlist of ports considered for the wind farm project identified in Table 5. This is based on the main construction activities that are envisaged to be required under the current project requirements and port capabilities.

The shortlist of ports is not definitive and does not preclude the potential consideration of other suitable locations at the time of final port selection. Final port selection will be dependent upon, and only take place following:

- the grant of development consent for the wind farm project;
- confirmation of route to market including final investment decision, and
- on the findings of further technical and commercial studies.

Additional activities may occur at other ports and locations further afield; the global nature of supply chains means it is not possible to identify or assess these at this relatively early stage.

Of all ports listed below, the vast majority are within the regional study area, with the exception of Forth Ports and Port of Montrose. For each principal function, we graded Scottish ports follows:

Level of investment needed	RAG rating
Suitable for potential use by MarramWind with minor investment, or major investment already committed (<£5 million)	Green
Suitable for potential use by MarramWind with major additional investment	Amber
Unsuitable for potential use by MarramWind	Red

Table 4 Availability of Scottish ports to support MarramWind

Port	Function	Regional study area	Deprived area	Level of investment needed
Port of Nigg	Construction	Yes	Yes	
Port of Cromarty Firth	Construction	Yes	Yes	
Port of Adersier	Construction	Yes	Yes	
Forth Ports (Burntisland)	Construction	No	Yes	
Forth Ports (Leith)	Construction	No	No	
Forth Ports (Methil)	Construction	No	Yes	
Forth Ports (Rosyth)	Construction	No	Yes	
Port of Aberdeen	Construction	Yes	Yes	
Kishorn Port	Construction	Yes	Yes	
Fraserburgh Harbour	Operations	Yes	Yes	
Buckie Harbour	Operations	Yes	Yes	
Peterhead Port	Operations	Yes	Yes	
Port of Montrose	Operations	No	Yes	

Of all construction ports, all five sites that are within the region are also located in deprived areas. The Ports of Nigg, Cromarty Firth, and Ardersier all have well-advanced investment plans to support both fabrication and integration activities for floating offshore wind. Kishorn Port also has a relatively advanced plan, including a masterplan for significant expansion of its existing dry dock to handle large offshore structures, adding capacity for manufacturing and assembly. Forth Ports plans to invest over £100 million in a high-capacity floating offshore wind integration facility at the Port of Burntisland and is investing £50 million in Port of Leith[40].

For operational ports, all proposed sites are in the regional study area and based in deprived areas. Several have already been selected as O&M bases for offshore wind projects under construction and are receiving investment.

The following sections focus on the ports highlighted in amber as action would be needed to make the sites suitable.

Forth Ports (Methil)

Forth Ports Methil is outside of the regional study area. It has a 55 ha engineering site operated by Navantia UK. Navantia is considering expanding the facilities to support floating offshore wind

[40] Forth Ports, March 7, 2024. Scottish Secretary visits Scotland's largest renewables hub at Port of Leith. Available at: Scottish Secretary visits Scotland's largest renewables hub at Port of Leith | Forth Ports

fabrication and installation activities.[41] While the scale of investment is not yet confirmed, Navantia brings offshore renewables experience in fabrication and construction from its existing operations and has a strong interest in developing its role in the offshore wind sector.

Port of Aberdeen

The Port of Aberdeen is currently serving the fixed offshore wind industry from its recently opened South Harbour. Existing activity includes oil and gas, fixed offshore wind, and general cargo, with space available for expansion into floating offshore wind. It is owned and operated by Aberdeen Harbour Board, who are actively positioning themselves to capture floating offshore wind opportunities. Plans to dredge the existing quayside to 14.5 metres could enable floating offshore wind turbine integration.

Forth Ports (Rosyth)

This port is outside of the regional study area. A consortium of Babcock International, Forth Ports Group, and Scarborough Muir Group plans to develop nearly 150 ha at Rosyth to support floating offshore wind. The site will focus primarily on manufacturing.

3.3 SCDS expenditure commitments and ambitions

This section compares current SCDS expenditure commitments and ambitions with the supply chain mapping findings above. Initially submitted in 2021 to support MarramWind's application for ScotWind Leasing in 2021, MarramWind Ltd produced a SCDS Update in 2023 that provides a series of commitments taking accounting of existing challenges and opportunities within the Scottish supply chain. The SCDS is intended to provide project specific supply chain information to be communicated with Crown Estate Scotland, through the initial stages of project development to deployment and into operations, focusing on maximising the opportunity from offshore wind across Scotland and the UK.

Table 5 sets out intended SCDS expenditure across the different stages of the MarramWind project for Scotland, rest of the UK, Europe and elsewhere. MarramWind Ltd also set out its ambitions expenditure (**Table 6**) that outlines cost scenarios which maximise Scottish content, subject to significant investment in the Scottish offshore wind industry by supply chain companies, government and other industry bodies.

Table 5 SCDS Commitments – financial

Commitment Table				
	£ Million			
Project Stage	**Scotland**	**rUK**	**EU**	**Elsewhere**
Development	172.0	53.6	56.4	-
Manufacturing & Fabrication	3,137.8	1,012.1	3.890.5	1,031.0
Installation	201.7	230.4	421.1	-
Operation	1,148.4	95.0	63.4	-

Source: MarramWind (2023)

The commitments in Table 5 are based on MarramWind's cost expectations at time of SCDS submission, accounting for existing challenges and opportunities within the Scottish supply chain, based on the assumption of the semi-submersible floating foundations being in steel and / or concrete. The expenditure for Scotland and UK also acknowledges that the supply chain for floating wind projects in comparison to fixed offshore wind projects is still evolving.

[41]Navantia UK, August 26 2025, Available at: https://navantia.co.uk/methil/

Table 6 SCDS Ambitions – financial

Ambition Table				
	£ Million			
Project Stage	Scotland	rUK	EU	Elsewhere
Development	220.0	11.3	50.8	-
Manufacturing & Fabrication	4,522.2	269.1	3,890.5	168.4
Installation	619.7	-	233.4	-
Operation	1,148.4	95.0	63.4	-

Source: MarramWind (2023)

The ambitions outlined in Table 6 reflect greater levels of expenditure in the Scottish offshore wind industry by the supply chain, government and other industry bodies.

For the **development stage** and as evidenced by the supply chain mapping, the commitments and ambitions provide an opportunity to support Scotland's strong capabilities in development and project management with a number of established suppliers located in the regional study area. This includes SMEs who are typically active in delivering environmental surveys and have the potential to support larger firms through providing specialist sub-contracted services.

For the **manufacturing and fabrication stage,** the commitment made by MarramWind is in line with recent findings from the Scottish Trade Union Congress (STUC) (2024)[42] which showed that ScotWind developers have committed to invest 38% of their overall supply chain spend in Scotland – equivalent to almost £30 billion. The vast majority of this commitment is spent on manufacturing. As described in the 2023 MarramWind SCDS update, the commitments and ambitions are largely driven by expectations of large-scale inward investment rather than changes in the capabilities of existing Scottish or UK suppliers. For some of the specialisms within the manufacturing stage, only a few major suppliers exist in Scotland and specifically the regional study area. Therefore, the extent of Scottish expenditure is likely to depend on securing contracts with a small number of suppliers.

For the **installation and commissioning stage,** there is significant expertise in Scotland. There is a mix of companies including larger firms likely to deliver full-scope contracts and SMEs providing support services. Although local experience in floating offshore wind installation is limited due to a less mature market, companies located in the regional study area have substantial expertise from fixed wind and oil and gas projects that can be applied.

Scotland has strong capabilities for the **operations and maintenance stage,** with many suppliers in the study area providing services during installation with the capability of delivering major contracts. Ports also represent a key area for delivering significant value given that most of the construction and operational ports in Scotland relevant to MarramWind are located in the regional study area. Several ports have already been selected as O&M bases for offshore wind projects under construction and are receiving investment. The extent of Scottish expenditure will depend on factors such as demand from other offshore wind developments.

3.4 Wider SCDS commitments

In their 2023 SCDS update, MarramWind presented a number of non-financial supply chain commitments to support growth in the Scottish supply chain. These commitments were developed based on the opportunities in energy manufacturing, infrastructure and maintenance, and in alignment with the Scottish Offshore Wind Energy Council (SOWEC) vision for an offshore wind sector that generates employment, investment and export opportunities[43]. Whilst these commitments vary with regards to their focus on SMEs, tier 1 suppliers or Scottish suppliers more generally, they all aim to support suppliers with addressing skills and capability gaps and fostering proactive procurement.

The key non-financial commitments are:

[42] Scottish Trades Union Congress. (2024). *Scotwind: The investment needed to secure manufacturing jobs in Scotland.* Available at: scotwind-report-2024.pdf
[43] MarramWind Ltd. (2023). April 2023 MarramWind SCDS Update. Available at: marramwind-scds-outlook-july-2023-update.pdf

- Continued engagement with local communities and supply chain including through hosting supplier events.
- The creation of an ‘Offshore Wind Stimulus Fund’ (OWSF) to invest in infrastructure and facilities in Scotland that will manufacture and service offshore wind projects as well as support companies to innovate and upskill including Small and Medium-sized Enterprises. The OWSF will have a budget of £25 million to benefit the Scottish supply chain.
- Continued work with suitable partners and enterprise agencies such as Scottish Enterprise (SE), Highlands and Islands Enterprise (HIE), South of Scotland Enterprise (SoSE), the Clean Energy Cluster and the Forth & Tay Offshore cluster to identify Scottish suppliers with potential to fulfil subcontracted scopes of work.
- A long-term skills development plan to provide access to training for those wishing to enter the offshore wind industry.
- Continued work with education facilities to promote diversity and provide support to learn about Science, Technology, Engineering and Maths (STEM) subjects in order to engage from an early age and spark interest in the future workforce.

4. Policy context and review of SCDS commitments

The immediate policy context for the development of the SEAP is National Planning Framework 4 Policy 11c and 25, which state that “development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities” and “proposals which contribute to local or regional community wealth building strategies and are consistent with local economic priorities will be supported”. However, to shape the recommendations of the SEAP, several other policies and guidance were considered to align with common themes and actions. This chapter compares the MarramWind’s current SCDS commitments with the relevant policy context.

4.1 Relevant policy context

Specific policy frameworks and guidance of relevance are:

- **NPF4, Scottish Government**[44]: To support the expansion of renewable technologies, NPF4 sets out that development proposals will only be supported where they maximise net economic impact, including local socio-economic benefits (Policy 11c) in terms of **supply chain and business opportunities and employment**, and contribute to local or regional community wealth building strategies that align with economic priorities such as reducing inequalities and enhancing community resilience (Policy 25).

- **Charter for Energy Developments, Aberdeenshire Council**[45]: The Charter sets out expectations for energy developers to align with NPF4 Policies 11 (Energy) and 25 (Community Wealth Building) including fair employment, proactive procurement and supporting local business participation in the supply chain and investing in resilient communities. It aims to ensure that major energy infrastructure projects deliver lasting socio-economic benefits to local communities in Aberdeenshire.

- **Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments, Scottish Government**[46]: Guidance for offshore renewable energy developers in designing community benefit packages that ensure local communities share in the socio-economic value of Scotland’s offshore energy developments.

- **Clean Industry Bonus Allocation Framework, Department for Energy Security & Net Zero**[47]: The Clean Industry Bonus (CIB) offers additional financial support to offshore wind developers that commit to more sustainable and inclusive supply chains. It encourages investment in UK-based supply chains, promote low-carbon manufacturing and support community wealth building.

- **Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework, Scottish Renewables**[48]: Guidance for renewable energy developers to demonstrate how projects intend to actively maximise place-based impacts using the Onshore Wind Sector Deal as a model. The reporting framework includes community socio-economic benefits such as employment, supply chain opportunities and community empowerment.

[44] Local Government and Housing Directorate (2023). National Planning Framework 4. Available at: National Planning Framework 4 - gov.scot
[45] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[46] Scottish Government (2018). Scottish Government Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments. Available at: community-benefits-offshore-gpp.pdf
[47] Department for Energy Security & Net Zero (2024, revised in 2025). Contracts for Difference Scheme for Renewable Electricity Generation: Allocation Round 7: Clean Industry Bonus Allocation Framework, 2024. Available at; CfD AR7: Clean Industry Bonus Allocation Framework, 2024
[48] Scottish Renewables (2025). Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework: Guidance for developers to comply with NPF4 Policy 11c. Available at: 2025.03.18_Maximising_Net_Socio-Economic_Benefit_Reporting_Framework_original.pdf

4.2 Policy/Guidance review against SCDS commitments

Relevant policy and guidance have been grouped into the four themes:

- Supporting the supply chain
- Promoting fair employment
- Providing skills and training
- Supporting and enhancing communities

Table 7 Review of policy frameworks

Theme	Policy frameworks/guidance	Review of SCDS Commitments and suggested actions
Supporting the supply chain	**NPF4**[49] sets out that development proposals will only be supported where they maximise net economic impact, including local **supply chain and business opportunities** and **employment.** Amongst other principles, the **Charter for Energy Development from Aberdeenshire Council**[50] sets out seven Collaboration Principles for developers, including the development of opportunities for local **supply chains and fostering inward investment** for Aberdeenshire. **The Clean Industry Bonus Allocation**[51] offers additional financial support to offshore wind developers that commit to **shorter and cleaner supply chains**. CIB applications must either i) invest in shorter supply chains; or ii) invest in more sustainable means of production. The former criterion requires investment in a manufacturing facility, installation firm or port associated located within a UK deprived area. **The Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework**[52] recommends sectoral activity to support **supply chain development** highlights the need for understanding local context to effectively maximise socio-economic benefits.[53] Developers should prioritise	MarramWind's SCDS commitments fulfil their purpose in setting out supply chain commitments to address challenges and opportunities within the offshore wind supply chain in Scotland. In line with regulatory requirements, there is a need for MarramWind to analyse the socio-economic profile of the local area to identify challenges within affected communities and opportunities to address existing inequalities and address local priorities. This is reflected by the findings from this study and in particular the socio-economic action plan presented in Chapter 6.

[49] Local Government and Housing Directorate (2023). National Planning Framework 4. Available at: National Planning Framework 4 - gov.scot
[50] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[51] Department for Energy Security & Net Zero (2024, revised in 2025). Contracts for Difference Scheme for Renewable Electricity Generation: Allocation Round 7: Clean Industry Bonus Allocation Framework, 2024. Available at; CfD AR7: Clean Industry Bonus Allocation Framework, 2024
[52] Scottish Renewables (2025). Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework: Guidance for developers to comply with NPF4 Policy 11c. Available at: 2025.03.18_Maximising_Net_Socio-Economic_Benefit_Reporting_Framework_original.pdf
[53] [53] Scottish Renewables (2025). Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework: Guidance for developers to comply with NPF4 Policy 11c. Available at: 2025.03.18_Maximising_Net_Socio-Economic_Benefit_Reporting_Framework_original.pdf

	locally grounded evidence and rationale for actions plans rather than generic commitments.	
	The Aberdeenshire Council Charter for Energy Developments recommends prioritising opportunities for the supply of goods and services from Aberdeenshire companies during construction and operation.[54] Where local content is not available, developers should consider promoting and negotiating inward investment into Aberdeenshire. Supply chain events and frameworks for potential contracts should be advertised and marketed in sufficient time to elicit appropriate responses. **The Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework** present further recommended actions to maximise supply chain benefits through more **proactive procurement** based on a model of the onshore wind industry.	MarramWind's SCDS commitments seek to maximise the uptake of sub-contract opportunities and embed social value in the supply chain. This study reflects on the socio-economic characteristics of local and regional study areas for the wind farm project and provides recommendations which will support maximising procurement benefits in these areas.
Promoting fair employment	The **Aberdeenshire Charter for Energy Developments** highlights the capability of energy developments in Aberdeenshire to **maximise local employment opportunities**.[55] The aim is to promote jobs locally and attract more local people in sector employment to reduce claimant rate across Aberdeenshire. **The Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments**[56] highlights the need for developers to ensure local communities benefit from the socio-economic value of Scotland's offshore energy developments including employment.	Whilst MarramWind's existing commitments do not specifically refer to creating fair employment, they do include supporting new entrants to the market and Scottish businesses more generally which will have a positive impact on employment. This study reflects on the socio-economic characteristics of local and regional study areas for the Project and the socio-economic action plan presented in Chapter 6 provides recommendations which will help to ensure the promotion of fair employment in these areas.

[54] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[55] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[56] Scottish Government (2018). Scottish Government Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments. Available at: community-benefits-offshore-gpp.pdf

	The Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework recommends sectoral activity to **support skills and workforce development.**	
Providing skills and training	The **Aberdeenshire Charter for Energy Developments** highlights the capability of energy developments in Aberdeenshire to retain local talent through the collaboration principle to '**provide a long-term and collaborative programme on skills development within Aberdeenshire**'.[57] Through targeted outcomes energy development projects can improve the local skills base. **The Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework** recommends sectoral activity to **support skills and workforce development.** **The Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments**[58] highlights the need for developers to ensure local communities benefit from the socio-economic value of Scotland's offshore energy developments including skills development.	MarramWind's existing commitments present broad recognition of the need to upskill new entrants to the market and suitable supply partners to increase competition and capabilities within the offshore wind sector. MarramWind intend to achieve this upskilling through the delivery of its Offshore Wind Stimulus Fund. MarramWind also commit to engaging with skills stakeholders to establish appropriate criteria for training and education initiatives, including both local and national stakeholders. This study reflects on the socio-economic characteristics of local and regional study areas for the wind farm project and includes recommendations which will promote skills development.
Empowering communities	**NPF4 Policy 25 (Community Wealth Building)** sets the expectation that development proposals must contribute to local	The SCDS commitments (financial and non-financial) will contribute to local or regional community wealth and support local economic priorities. The findings from this study will help to focus this support to the local and regional study areas for the wind farm project.

[57] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[58] Scottish Government (2018). Scottish Government Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments. Available at: community-benefits-offshore-gpp.pdf

or regional community wealth building and support local economic priorities.[59]

The **Aberdeenshire Council's Charter for Energy Development** sets out the expectation for due consideration to initiatives within the local host community.[60] The Charter outlines the expectation for energy development objectives to consider building more **vibrant, safe and resilience communities** through improving **local social and environmental capital**; preserving access **to leisure and recreational amenity**; and improving the local housing stock. Further to these outcomes, developer's applications are also recommended to consider addressing inequalities and ensuring equality of opportunity.

The **Maximising Net Socio-Economic Benefit of Renewable Energy Guidance and Reporting Framework** highlights the need for sectoral activity to support **community empowerment** and sectoral activity to enhance and protect the natural and built environment. Developers should prioritise locally grounded evidence and rationale for actions plans.

The **onshore wind sector** defined 'community package' as including community engagement, community benefits and shared ownership to retain wealth in communities.[61] Good practice guidance on community benefits from Scottish Government emphasise the purpose of community benefit packages as enabling 'local communities to share in the socio-economic value of Scotland's offshore energy developments' as a gesture acknowledging the community hosting the new development.[62]

[59] Local Government and Housing Directorate (2023). National Planning Framework 4. Available at: National Planning Framework 4 - gov.scot
[60] Aberdeenshire Council (2025). Aberdeenshire Council Community Wealth Building Energy Development Charter. Available at: Energy Development Charter | Community Wealth Building Strategy | Engage Aberdeenshire [accessed 05/08/25].
[61] Scottish Renewables (2023). Onshore Wind Sector Deal for Scotland. Available at: Onshore Wind Sector Deal for Scotland
[62] Scottish Government (2018). Scottish Government Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments. Available at: community-benefits-offshore-gpp.pdf

5. Stakeholder engagement

Stakeholder engagement was undertaken to seek feedback on the evidence base gathered for this study and to inform SEAP recommendations. In summary, the feedback broadly supported the SEAP's overall direction and its focus on maximising local benefits from the MarramWind project. It has also helped to ensure that the recommendations are grounded in existing regional priorities and partnerships. The next sections set out the engagement approach and the findings by theme.

5.1 Engagement approach

A series of facilitated 60-minute virtual interviews were arranged with key stakeholders including representatives from local authorities, economic development agencies, community groups and industry bodies:

- Aberdeenshire Council
- Moray Council
- Highland Council
- Peterhead Community Council
- Energy Transition Zone (ETZ)
- Buchan Development Partnership
- Highlands and Islands Enterprise; and
- Scottish Enterprise.

The purpose of this engagement was to gather stakeholder perspectives on the following:

- To ensure that key social and economic opportunities and challenges, and supply chain capabilities were captured for the regional and local study areas;
- To discuss the proposed recommendations;
- To identify any additional actions or priorities that should be considered; and
- To highlight opportunities for collaboration or integration with existing initiatives.

Each session was facilitated by AECOM and structured around a supporting presentation to guide discussion. The engagement followed a two-part format:

1. **Context and Evidence Review:** Stakeholders were invited to provide feedback on the key findings of the socio-economic baseline and supply chain mapping, highlight any gaps, and identify additional local challenges or emerging opportunities.
2. **Recommendations and Actions:** Stakeholders were asked to consider the relevance of proposed actions, suggest refinements, and identify specific initiatives that could be connected to or supported through the SEAP. This discussion was structured around the four thematic areas of the Action Plan: Supporting the supply chain; Promoting fair employment; Providing skills and training; and Empowering communities.

The feedback collected through these sessions informed development of the SEAP so that the final recommendations reflect local priorities, build on existing regional activity, and support practical delivery partnerships.

5.2 Findings by theme

Feedback from the stakeholder engagement sessions has been summarised and analysed under the following themes:

- Skills and Education
- Barriers to Employment

- Local Business and Supply Chain Development
- Community Benefit and Collaboration

5.2.1 Skills and education

Stakeholders broadly agreed with the assessment of strong regional employment in engineering, construction and energy sectors, alongside lower attainment and skills shortages compared with national levels. The main priority identified by stakeholders was to strengthen education and training pathways to meet future workforce demand and ensure future skills demand can be met.

Stakeholders emphasised the importance of engagement through schools and careers advice to promote awareness of opportunities in the offshore wind sector which could potentially lead to pathways to employment. They highlighted the value of interactive and field-based learning experiences that allow students to connect classroom learning with real-world applications, with examples such as OREC Cable Testing Facility[63] referenced. Ongoing initiatives were highlighted to encourage engagement such as work experience weeks enabling pupils to shadow employees across a range of companies. Programmes such as the Developing the Young Workforce initiative[64], the Powering Futures programme[65], the Newton Rooms led by the Science Skills Academy[66], and wider STEM initiatives were cited as positive examples of connecting education with industry needs.

Evidence indicated that STEM engagement remains uneven across the region, with limited local awareness of renewables-related career opportunities. Stakeholders noted that schools in Fraserburgh and Peterhead are being supported by local contractors and industry representatives, including MarramWind Ltd[67] to raise awareness of skills gaps and the transition towards renewable energy careers. However, they also highlighted that many working-age residents in Peterhead currently lack STEM qualifications. Whilst there is no specific data on STEM qualifications in the local study area, this observation is supported by the findings from **Chapter 2** which highlights that the local study area has fewer residents with degree-level qualifications and more with no qualifications. It was noted that efforts should target schools that may miss out on such opportunities due to their location, size, or resource constraints. Stakeholders also expressed broad support for continued collaboration between colleges, universities, and employers to ensure that qualifications remain aligned with evolving technologies.

Apprenticeships and retraining were also discussed. Foundation and modern apprenticeship demand is high, but business capacity to host placements is limited, with high dropout rates and competition between employers in Aberdeenshire. Flexible and modular training formats were viewed as important in enabling those already in employment to retrain or upskill for roles in renewable energy and related sectors. Stakeholders suggested that recommendations should align with local action plans being developed through initiatives such as Moray Pathways[68], a local employability partnership, and that collaboration with organisations such as the National Energy Skills Accelerator (NESA)[69] and the North East Scotland College (NESCol)[70] would help ensure alignment between education provision and industry demand. In addition, UK and Scottish Government retraining programmes, such as the £18 million Oil & Gas Training Transition Fund[71], were also highlighted as important for supporting career development and facilitating transition into sustainable energy sectors. Stakeholders

Key Takeaway: **Strengthening of Education and Training Pathways**
Stakeholders reinforced the need for stronger, more coordinated education and training pathways to meet future energy sector demand. The SEAP supports this by incorporating initiatives that enhance STEM engagement and align skills provision with emerging industry needs, including Skills Transition programmes, NESCol, and wider STEM initiatives.

[63] ORE Catapult (2025) £2 million invested in offshore wind cable testing in North East England. Available at: £2 million invested in offshore wind cable testing in North East England
[64] Developing the Young Workforce. Available at: DYW - Scotland - DYW Scotland - Home
[65] Powering Futures. Available at: Powering Futures
[66] The Science Skills Academy. Available at: Newton Rooms | Science Skills Academy | Science Skills Academy
[67] MarramWind. Peterhead pupils get a glimpse of a clean energy future thanks to MarramWind. Available at: Peterhead pupils get a glimpse of a clean energy future thanks to MarramWind - MarramWind
[68] Moray Pathways. Available at: Moray Pathways | Learn, Train and Work | Employability Services in Moray
[69] The National Energy Skills Accelerator. Available at: NESA | Home
[70] North East Scotland College. Energy Transition Skills. Available at: Energy Transition Skills - North East Scotland College
[71] The Scottish Government (2025) £18 million for Oil and Gas Transition Training Fund. Available at: £18 million for Oil and Gas Transition Training Fund - gov.scot

suggested that additional incentives may help sustain employer engagement, particularly among supply chain companies.

5.2.2 Barriers to skills and employment

Stakeholders identified several barriers that limit participation in employment and training. Transport was highlighted by most stakeholders as a key factor. In rural areas, including Moray, Highland and Aberdeenshire (particularly in areas such as Fraserburgh and Peterhead), infrequent public transport, long journey times, travel costs, and access to a car can restrict attendance at work, college, or training programmes. Stakeholders referenced the importance of local opportunities in areas with limited transport access, and highlighted examples such as the Energy Transition Skills Hub[72], which has identified this barrier and developed an outreach vehicle[73] to help make training more accessible. Initiatives run by Moray Council, such as the M-Connect bus service[74], also play an important role in helping to improve access for rural residents to employment and training.

Childcare was highlighted as a particular barrier for women's participation in employment, notably in rural areas such as Buckie, where school-age childcare was described as being very limited[75]. Stakeholders suggested linking community benefit or employment interventions to childcare provision to support workforce inclusion. Broader barriers include digital connectivity gaps in rural areas[76], with some households lacking reliable broadband or suitable devices, reducing opportunities for online learning, applications, and remote work. Persistent local deprivation was also highlighted, with low incomes in Peterhead, where around 40% of households earn below £20,000 per year[77], being cited as an example.

Stakeholders highlighted an issue regarding the misalignment between project delivery schedules and workforce readiness. Skills remain concentrated in oil and gas while renewables are still scaling up. Stakeholders emphasised the importance of accessible transition pathways to avoid losing skilled workers and to retain expertise locally.

Stakeholders noted that while examples of good practice exist in addressing barriers to employment and skills, such as interview guarantee schemes such as that led by Aberdeen City Council and programmes linked to Just Transition Funding[78], delivery can be fragmented. Stakeholders called for a joined-up approach across local authorities, training providers and industry to ensure interventions are accessible and targeted where most needed.

Key Takeaway: **Address Barriers to Participation**

Transport, childcare and digital access are recognised as persistent constraints, particularly in rural areas such as Fraserburgh and Peterhead. The SEAP supports interventions tailored to communities with such barriers including local training delivery, outreach programmes and flexible working opportunities.

5.2.3 Local Business and Supply Chain Development

Stakeholders acknowledged that this study offers a credible overview of current supply chain activity, but noted that it represents only a point in time within an evolving sector. Several participants highlighted the breadth of regional capacity, noting that smaller firms, ports, and fabrication sites, particularly those located further north, may be underrepresented in the evidence base. It was suggested that the reported number of supply chain companies in this study should be treated as indicative, not definitive, as future diversification may increase local capacity.

[72] North East Scotland College. Energy Transition Skills. Available at: Energy Transition Skills - North East Scotland College
[73] North East Scotland College. Energy on the Move. Available at: Energy on the Move - North East Scotland College
[74] Moray Council. M.connect. Available at: m.connect - Moray Council
[75] Buckie Regeneration Group (2009). Buckie childcare and young children's facilities audit. Available at: http://www.yourmoray.org.uk/downloads/file105229.pdf
[76] Audit Scotland (2024) Tackling digital exclusion. Available at: Tackling digital exclusion
[77] Aberdeenshire Council (2021). Peterhead Strategic Needs Assessment. Available at: Peterhead SNA
[78] The Scottish Government (2025). Just Transition Fund. Available at: Year one projects - Just Transition Fund: application form and guidance - gov.scot

Scottish Enterprise (SE) and Highlands and Islands Enterprise (HIE) specifically highlighted the ongoing work to help businesses from around the world do business in or with Scotland.[79] Securing more international investment was flagged as vitally important in helping to create a more dynamic and globally competitive economy in Scotland and to provide, and develop, opportunities for the local supply chain. According to SE and HIE, the transition to net zero opens huge opportunities to innovate and grow businesses in Scotland. Floating offshore wind investment opportunities have been identified in areas including nacelles, floating foundations, towers and blades and anchors and moorings.[80] If these investments materialise, they could provide additional opportunities for the local supply chain in the areas covered by the MarramWind project.

The growing pipeline of opportunities in the sector was noted by stakeholders with local businesses increasingly adapting to meet new market demands. Planned infrastructure developments in Fraserburgh[81] and North Aberdeen[82], alongside Aurora Energy Services' investment in a skills hub and new fabrication centres[83], were highlighted as key examples of ongoing expansion and diversification within the regional supply chain.

Stakeholders reported that the region has strong manufacturing and fabrication capacity, particularly in secondary steel as pointed out in **Chapter 3**, with numerous SMEs able to supply components. Stakeholders highlighted the importance of undertaking significant operations and maintenance activity locally, as this would enable supply chain clustering and create longer-term local employment opportunities. It was also suggested that O&M bases could create roles particularly attractive to women, such as monitoring, data analysis, and other analytical positions, offering a route to greater gender diversity in the sector.

Stakeholders identified opportunities to formally collaborate with the Clean Energy Cluster[84] to build a more granular understanding of regional supply chain capacity to support targeted supply chain development and stimulate local demand. The importance of ensuring local benefits through employment and skills development was emphasised, for example the forthcoming Aberdeenshire Investment Zone[85] was highlighted as an opportunity to align future investment with local business capability, innovation, and long-term workforce needs. Stakeholders also recommended encouraging tier 1 suppliers to use local recruitment channels and to support local SMEs through Clean Industry Bonus (CIB)[86] initiatives that facilitate entry into the renewables supply chain.

Key Takeaway: **Supply Chain Opportunities**

Stakeholders highlighted growth of the sector and future supply chain opportunities, especially for nacelles, floating foundations, towers and blades and anchors and moorings. The SEAP supports local employment, and skills development, reflecting ongoing expansion and diversification within the regional supply chain. Recommendations are linked to regional initiatives, such as the Aberdeenshire Investment Zone, and the Clean Energy Cluster Forum to maximise impact.

5.2.4 Community Benefit and Collaboration

Existing community benefit mechanisms, such as the various ETZ Funds and the Community & Coast Fund[87], were recognised as examples of good practice. There was support for exploring a more coordinated approach to managing community benefits, potentially through collaboration between

[79] The Scottish Government. International Trade and Investment. Available at: Attracting and supporting investors - International trade and investment - gov.scot
[80] ORE Catapult (2024). Port and Manufacturing Infrastructure Investment Models. Available at: Port Infrastructure and Manufacturing Investment Models - Floating Offshore Wind Centre of Excellence
[81] Fraserburgh Harbour. Masterplan. Available at: Harbour Information: Harbour Masterplan | Fraserburgh Harbour Commissioners
[82] Port of Aberdeen. Port of Aberdeen: Leading Scotland's offshore wind future. Available at: Port of Aberdeen: Leading Scotland's offshore wind future - Port of Aberdeen
[83] Aurora Energy (2024) Aurora Secures Funding from The Scottish National Investment Bank. Available at: Aurora Secures Funding from The Scottish National Investment Bank
[84] The Clean Energy Cluster. Available at: The Clean Energy Cluster
[85] UK Government (2025) Investment zones to bring jobs and cash to Scotland. Available at: Investment zones to bring jobs and cash to Scotland - GOV.UK
[86] UK Government (2024) Contracts for Difference (CfD) Allocation Round 7: Clean Industry Bonus framework and guidance. Available at: Contracts for Difference (CfD) Allocation Round 7: Clean Industry Bonus framework and guidance - GOV.UK
[87] ETZ. Community & Coast Programme. Available at: ETZ Ltd | Community & Coast

community councils, to simplify access and ensure equitable distribution of funding. It was acknowledged, however, that such an approach remains an aspiration at this stage.

Stakeholders also observed that funding and initiatives can be concentrated at a regional or national level, with limited visibility or accessibility at the local scale, with programmes often struggling to deliver tangible benefits within local communities.

Some stakeholders were supportive of exploring the Offshore Wind Stimulus Fund suggested by MarramWind Ltd, to help local SMEs prepare for upcoming offshore wind opportunities. They also noted that mechanisms such as the North East Small Business Fund and pre-employment grants are valuable precedents that could be expanded.

In terms of communication, stakeholders emphasised the importance of maintaining accessible channels for residents, businesses, and community groups. Some stakeholders invited further discussions on how the recommendations in this study could be refined to maximise local benefit, including opportunities to host follow-up meetings and workshops. Tools such as community newsletters, online dashboards, and local information sessions were identified as effective means of sharing updates and promoting engagement.

Key Takeaway: **Community Benefit Delivery**

Stakeholders highlighted the value of existing community benefit mechanisms but called for a more coordinated and locally accessible approach to maximise impact. The SEAP encourages a coordinated approach to managing community benefits. Tools such as newsletters, online dashboards, and local information sessions are highlighted.

6. Recommendations

Recommendations for MarramWind have been developed to address the findings from the social and economic profiling, supply chain capability mapping, policy review and SCDS assessment, and stakeholder engagement exercises, as presented above. These recommendations for action are presented below Table 8, grouped by theme, to support businesses and communities within the study areas for the project. Some of the actions relate to MarramWind's existing commitments while others represent additional commitments. Where existing commitments have been considered, the recommendations have focused on tailoring these to prioritise the local and regional study areas for the Project.

Table 8 Socioeconomic Action Plan – Actions, Opportunities and Challenges

Theme	Challenges and opportunities	Recommendation/action	#
Recommendations to tailor existing SCDS non-financial commitments			
Supporting the supply chain	Larger firms dominate engineering, consultancy and legal contracts, while SMEs are mainly active in specialist environmental survey work. (Challenge 8). Scotland lacks serial production facilities, has a fragmented supply chain, and ports are privatised. (Challenge 9). The Regional study area has considerable expertise in development and project management, with several established suppliers providing engineering and consultancy and legal services (Opportunity 7). Key manufacturing facilities are concentrated near ports, and SMEs in the regional study area have limited direct experience in floating offshore wind manufacturing but could support larger contracts (Opportunity 8). Scotland has strong expertise in installation and commissioning. (Opportunity 9). Scotland has strong O&M capabilities, particularly in the regional study area around Aberdeen, leveraging the established oil and gas supply chain. Ports are a key enabler for O&M. (Opportunity 10).	An 'Offshore Wind Stimulus Fund' (OWSF) will be established by MarramWind to invest in infrastructure and facilities in Scotland that will manufacture and service offshore wind projects as well as support companies, including SMEs, to innovate and upskill. The supply chain analysis in this report has identified potential specialisms that could be targeted. This will need further work and engagement with suppliers to establish which specialisms require support and, where relevant, there should be a focus on supporting the supply chain located in the regional study area for the project.	1
		New entrants to the market and SMEs more generally will be supported with upskilling particularly in relation to the skills and process of putting together tenders and delivering contracts in the offshore wind sector. Organisations that can support with upskilling include the Clean Industry Cluster, innovation organisations such as the ORE Catapult, and industry-led initiatives such as OWGP. Further engagement with SMEs (with a focus on those located in the regional study area) will be required to establish priorities for where this support should be targeted. The Aberdeenshire Investment Zone could provide an opportunity to meet the workforce needs of the offshore wind sector by targeted funding and incentives, workforce training and initiatives, and fostering industry and education collaborations.	2
		MarramWind will work with suitable partners such as SE, HIE, the Clean Energy Cluster and the Forth & Tay Offshore cluster to identify key Scottish suppliers with the potential to fulfil subcontracted scopes of work. MarramWind will host	3

		supplier events to connect Tier 1 suppliers to sub-contractors. A survey with suppliers in the Northeast of Scotland should also be undertaken to measure current capacity and readiness for offshore wind. Working with the Clean Energy Cluster and the councils (Moray, Aberdeenshire, Aberdeen City and Highland), an annual supply chain report could be published, mapping project needs against local supplier capacity and publishing outcomes with recommended actions. The supply chain analysis in this report has identified potential opportunities for subcontracting. There will be a need to engage with partners, including enterprise agencies, agencies to ensure there is a focus on engaging suppliers located within the regional study area.	
		MarramWind should consider setting targets for Tier 1 suppliers that focus on supporting their use of Scottish supply chain companies in the regional study area. This could include encouraging Tier 1 suppliers to use local recruitment channels and to leverage Clean Industry Bonus (CIB) initiatives to support local SMEs.	4
Additional recommended actions			
Supporting the supply chain	The workforce is likely to require reskilling and adaptation to meet specific demands of offshore wind, recognising skill shortages in the industry particularly in electrical engineering, marine operations, and project management (Challenge 6). In terms of the regional study area, Aberdeenshire attracts relatively few working-age migrants despite strong inward migration to the wider region, posing challenges for	Consider the introduction of a Northeast Small Business Fund with grants to support businesses in high demand sectors (e.g., electrical engineering, digital specialisms, projects management and marine logistics). The fund with a focus on the regional study area for the project could provide grants to suppliers to upskill their workforce. This proposal is based on Baillie Wind Farm, operated by Statkraft, which will contribute £25,000 per annum towards a business fund throughout its 25-year operating period. The fund's mission is to promote economic growth in the area by	5

	workforce retention and attraction of entrepreneurial talent (Challenge 2). However, Aberdeenshire leads in business counts across key sectors (of all sizes) – including manufacturing, electricity, and professional, scientific and technical – highlighting a strong capacity to support offshore energy and supply chain growth (Opportunity 4).	supporting new and existing businesses and developing a skills base to meet new challenges.	
		Liaise and work with initiatives to support the growth of the supply chain particularly from a workforce development perspective within the regional study area. These could include collaborating with partners on supply chain programmes such as the Fit for Offshore Renewables (F4OR) Island programmes[88] or the Launch Academy[89].	6
Promoting fair employment	Deprivation hotspots exist within both the local and regional study areas for the project, particularly in relation to barriers preventing local people from taking up work or training (Challenge 3). Additionally, there is a qualification gap owing to a lower proportion of those in the study areas (compared with the national average) with degree-level qualifications and higher rate of individuals with no formal qualifications. This presents a barrier to accessing high-skilled roles and limited readiness for working on projects related to offshore wind (Challenge 4). The regional study area for the project faces potential challenges in sustaining long-term employment, with retention rates below the national average (Challenge 5). However, there are higher economic activity rates and lower claimant counts overall which indicate an engaged workforce (Opportunity 3). Apprenticeship uptake, particularly in Aberdeenshire, and initiatives like the Energy Engineering Foundation	Look into the feasibility of offering pre-employment grants (e.g. £200) to anyone moving into a new job and an additional grant (e.g. £500) towards living costs for anyone starting college/university. These grants could be made available to people living within the regional study area for the project. Grants of this amount have been provided by SSE as part of the Connect2Renewables (C2R) employment support and delivered in partnership with South Lanarkshire Council to help unemployed people who live within 10km of an onshore wind farm to get into work.	7
		Look into the potential for MarramWind and its suppliers to support flexible working to alleviate barriers to employment, such as caring responsibilities.	8
		Commit to an appropriate number of apprenticeships, training opportunities and jobs across the sector and related industries for those living within the regional study area for the project. This could also include funding scholarships for pursuing a renewable-related degree.	9

[88] Created by the Offshore Renewable Energy (ORE) Catapult, in partnership with the developers of four major Scottish offshore wind farm projects – MachairWind, Spiorad na Mara, Stoura and Arven – the Fit for Offshore Renewables (F4OR) Island programme will offer fully-funded, expert support to help eligible companies succeed in the offshore wind industry, both at home and abroad.
[89] The Launch Academy is a technology accelerator programme and provides early-stage companies with wraparound support to help them further develop, then fully commercialise, products and services targeting the UK's offshore wind market.

	Pathway suggest there is a growing talent pipeline (Opportunity 1). The development of the renewables and related industries supply chain offers an opportunity to create more local jobs in an area indicative of a dispersed labour market as evidenced by travel to work patterns (Opportunity 5).	Initiatives to support could include Moray Pathways Local Employability Partnership as well as collaboration with organisations such as the National Energy Skills Accelerator (NESA). There may also be opportunities to support UK and Scottish Government retraining programmes, such as the Oil & Gas Training Transition Fund.	
		Guarantee interviews for applicants (living in the regional study area for the project) who meet minimum job specification criteria and are from the most deprived postcodes or are facing barriers to employment. Support existing interview guarantee schemes such as that led by Aberdeen City Council and programmes linked to Just Transition Funding.	10
		Support Scotland-wide programmes such as “No One Left Behind” and “Fair Start Scotland”[90] (through a regional study area lens) by identifying gaps and opportunities working with partners such as Scottish Enterprise, Highlands and Islands Enterprise, the Clean Energy Cluster and the Forth & Tay Offshore cluster.	11
		Set targets for employment of under-represented groups (living within the regional study area for the project) for MarramWind’s suppliers.	12
Providing skills and training	There are barriers to employment across Scotland, including a lack of work experience while qualifications are relatively lower when comparing the regional study area with national averages (Challenge 4 and 5). Educational gaps and gender disparities are evident across the regional study area for the project as employment in traditionally male-dominated sectors including manufacturing, construction, and transport / logistics	Engage with schools within the local study area for the project. Activities may potentially include: • School visits (e.g., Mintlaw and Peterhead), site tours, presentations, and the establishment of a scholarship programme to inspire interest in renewable energy and support educational development. This could include joining up with field-based learning initiatives such as the OREC Cable Testing Facility and Aberdeen Port, ETZ’s	13

[90] The Scottish Government’s "No One Left Behind" aims to create a more inclusive, person-centred, and flexible employability system that supports people of all ages – especially those facing barriers to work such as health conditions, disabilities, or long-term unemployment. ”Fair Start Scotland” is the Scottish Government’s first fully devolved employment support service aimed to help people who face barriers to employment – such as disabilities, health conditions, or long-term unemployment risks – to find and sustain fair and meaningful work.

	remains skewed towards males, and females are more likely to have no qualifications (Challenge 4 and 5). However, there is a local focus on skills development in industries relevant to the offshore renewables and the wider sector with high enrolment in relevant modern apprenticeship starts especially in Aberdeenshire (Opportunity 4).	pilot work experience week, programmes such as Developing the Young Workforce, Powering Futures, and the Newton Rooms led by the Science Skills Academy. • Supporting STEM Programmes such as Young Engineers & Science Clubs, the NESCol Schools Technology College, and the This is Engineering campaign.	
		Work with relevant stakeholders such as Skills Development Scotland and / or NESCoL to explore the potential to introduce internships and work experience placements targeted at people within the regional study area who are facing barriers to employment Support initiatives such as the Energy Transition Skills Hub's outreach vehicle (the Energy on the Move programme), which visits schools to make Just Transition skills and training more accessible.	14
		Liaise and work with the Energy Transition Skills Hub, which invests in initiatives led by further education colleges, charities, community groups and skills bodies to help people into employment, develop vocational skills, and support energy startups.	15
		Commit to an appropriate number of reskilling of under-represented groups (living within the regional study area) for the supply chain.	16
Supporting and enhancing communities	More than 1 in 10 residents in the regional study area live within the most deprived national deciles, with challenges in access to services, crime, housing affordability, and education. Concentrations of deprivation are most pronounced in Peterhead and Fraserburgh, where multiple forms of deprivation, including income, education, and crime are apparent, together with challenges regarding transport connectivity (Challenge 3).	Establish a community benefit fund and/or community grants for the onshore infrastructure to support communities and organisations in the local and regional study areas for the project. Work with local communities to determine the best use of the fund/grants. Develop an approach to management and coordination of the fund and a plan to liaise with nearby projects or partners to coordinate community benefits. Learn from existing mechanisms such as the ETZ Funds and the Community & Coast Fund.	17

	A considerable number of potential suppliers are based in deprived areas increasing potential to maximise the wider socio-economic value of fulfilling a contract. There is an ageing population in the local and regional study area, with an older age profile and potentially more vulnerable population compared to Scotland overall (Challenge 1).		

7. Commitments and next steps

7.1 Commitments to action

MarramWind Ltd has taken the key findings and recommendations from the SEAP research and used them to create a series of commitments to actions, which appear in **Table 9** below. These commitments form part of the onshore and offshore consent applications for MarramWind Offshore Wind Farm, which include development, finalisation and implementation of the SEAP as an embedded environmental measure for the Project. The SEAP actions are iterative in nature and will be subject to further development as the Project makes progress towards construction and operation, thus enabling the actions to be better tailored to the specific needs and opportunities arising from the Project. They will also be refined via ongoing engagement with key stakeholders, which will include potential beneficiaries and delivery partners.

The actions listed in Table 9 will be delivered at different stages of the MarramWind's lifecycle, and as such, are contingent on the Project achieving certain milestones towards construction and operation. Conditions for delivery are specified with the description of the commitment, with most intended for delivery post-consent and subject to the Project securing planning permission. Other key milestones for the Project include reaching a Financial Investment Decision (FID) to proceed with construction and the Commercial Operations Date (COD) of the windfarm or one of its phases. Each commitment links to one or more of the recommendations outlined in **Table 8** and, where relevant, to MarramWind's existing SCDS commitments and / or objectives defined in the Aberdeenshire Council's Energy Development Charter.

Table 9 Commitments to action made by ScottishPower Renewables for MarramWind Offshore Wind Farm

Theme	Title	Description of Commitment	Rational for Commitment
Supporting the Supply Chain	Northeast Scotland Offshore Wind Stimulus Fund	MarramWind Ltd will ringfence at least £500,000 of the Project's Offshore Wind Stimulus Fund (OWSF) to support upskilling, innovation and business growth for supply chain companies in the Northeast of Scotland. This funding will be made available subject to the Project achieving planning consent and is intended to be used before Phase 1 of wind farm becomes fully operational (Phase 1 COD). The funding will be used to support the delivery of activities described elsewhere within this table, including a Supply Chain Development Programme.	Addresses recommendation 1 of the SEAP and enables delivery of recommendations 2, 5 and 6. Supports delivery of MarramWind's existing SCDS commitment to launch OWSF. Aligns with the proactive procurement objective specified within Aberdeenshire Council's Charter for Energy Development.
	Supply Chain Development Programme	MarramWind Ltd will develop and implement a Supply Chain Development Programme to help SMEs build the necessary skills and capabilities to win work in offshore wind. The programme will focus on supporting and enhancing pre-existing programmes where possible. The MarramWind project team will reach out to a	Addresses recommendation 2 of the SEAP and aligns with recommendations 5 and 6. Supports delivery of MarramWind's existing SCDS commitment to support SME upskilling.

	range of regional and national stakeholders over the course of 2026 and 2027 to inform the design of the programme and explore delivery options. The programme will be implemented subject to the Project achieving planning consent and is intended to commence within 12 months of a consent determination.	Aligns with the Proactive Procurement objective specified within Aberdeenshire Council's Charter for Energy Development.
Local Contracting Pilot	MarramWind Ltd will run develop and run a local contracting pilot to engage with local SMEs to test the accessibility of the Project's procurement routes and provide constructive feedback. The Pilot will form part of the Supply Chain Development Programme and help inform the development of SME support for upskilling. The Pilot will be run subject to the Project achieving planning consent and is intended to be undertaken once MarramWind's contracting approach for phase 1 is further developed and the likely opportunities for local SMEs are better known.	Addresses recommendation 2 of the SEAP and aligns with recommendation 1. Aligns with the Proactive Procurement objective specified within Aberdeenshire Council's Charter for Energy Development.
Improving Supply Chain Visibility	MarramWind Ltd will support efforts to improve the visibility of Scottish offshore wind supply chain capabilities. This will include working with partners at a national and regional level, such as the Scottish Offshore Wind Energy Council, Clean Industry Cluster, and the Peterhead Developers Forum, to support the mapping of current capabilities and highlight opportunities for future supply chain expansion. The MarramWind project team are already working with partners on a number of actions in this area and will seek to build on these efforts as the Project progresses towards construction and operation.	Addresses recommendation 3 of the SEAP and enables delivery of recommendation 4. Aligns with the Proactive Procurement objective specified within Aberdeenshire Council's Charter for Energy Development.
Meet the Buyer Programme	MarramWind Ltd will develop and run a Meet the Buyer Programme aligned with the project's work packages and key subcontracting opportunities. This will include at least one supplier-facing event held in the Northeast during the subcontract procurement phase. The delivery of the programme is subject to the Project achieving planning consent and making good progress towards Phase 1 FID, with event(s) being held shortly before and / or shortly after FID, dependant on the nature of the contracting opportunities.	Addresses recommendation 4 of the SEAP. Supports delivery of MarramWind's existing SCDS commitments. Aligns with the Proactive Procurement objective specified within Aberdeenshire Council's Charter for Energy Development.

	Tier 1 Local Content Measures	MarramWind Ltd will include commercial provisions for our tier 1 suppliers to maximise their engagement with local companies to raise awareness of subcontracting opportunities. This will include requiring tier 1s to support local Meet the Buyer Events and report on their use of local contractors. MarramWind's Tier 1 tender processes will include technical evaluation criteria on local supply chain engagement and reporting, subject to the Project achieving planning consent and proceeding towards FID.	Addresses recommendation 5 of the SEAP. Supports delivery of MarramWind's existing SCDS commitments. Aligns with the Proactive Procurement objective specified within Aberdeenshire Council's Charter for Energy Development.
Promoting Fair Employment	Supporting a Diverse and Inclusive Workforce	MarramWind Ltd will support the development of a diverse, inclusive workforce for MarramWind Offshore Wind Farm. ScottishPower has an established policy on Equality and Diversity that applies to the employees of its subsidiaries, including SPR and MarramWind Ltd, as well as job applicants, agency staff, contractor's consultants or any person working on behalf of a ScottishPower client. MarramWind Ltd will work with its tier 1 contractors, particularly those responsible for the operations and maintenance (O&M) of the wind farm, to promote equality and diversity, help eliminate discrimination and create equality of opportunities for all. MarramWind Ltd will also seek to work with 3rd party employment support providers, which may include Fair Start Scotland and No One Left Behind, to address barriers that may prevent people from a range of background from accessing employment opportunities at the Project's O&M base. MarramWind Ltd's commitment to diversity and inclusion is ongoing, but actions to support a workforce diversity at the Project's O&M base are contingent on the Project achieving planning consent and proceeding towards FID and will be progressed when the Project's employment requirements are better known.	Addresses recommendation 11 of the SEAP and aligns with recommendation 12. Aligns with the Equality objective specified within Aberdeenshire Council's Charter for Energy Development.
	Supporting Flexible Employment	MarramWind Ltd will support flexible working opportunities at the Project's operations & maintenance base. Operational staff employed directly by SPR will be offered flexible working opportunities in line with the company's Hybrid Working Model, which offers most SPR employees the opportunity to work flexibly within their contractual working hours and subject to operational	Addresses recommendation 8 of the SEAP and aligns with recommendation 12. Aligns with the Equality objective specified within Aberdeenshire Council's Charter for Energy Development.

		requirements. MarramWind will also work with the Project's tier 1 contractors to encourage their use of flexible employment options for relevant operational roles. This commitment is subject to the Project achieving FID and will be progressed once the employment opportunities arising from the operations & maintenance are better known.	
	Guaranteed Interviews for Local People	MarramWind Ltd will enable guaranteed interviews to people local to the wind farm's operational base who meet minimum job requirement. MarramWind will seek to work with regional partners, including Aberdeenshire Council, to support pre-existing interview guarantee schemes. This commitment is subject to the Project achieving FID and will be progressed once the employment opportunities arising from the operations & maintenance are better known.	Addresses recommendation 10 of the SEAP and aligns with recommendations 8 and 9. Aligns with the Fair Employment objective specified within Aberdeenshire Council's Charter for Energy Development.
Providing Skills and Training	Local Trainee Pathways	MarramWind Ltd will work with education institutes and agencies in the Northeast of Scotland to support apprenticeships and / or work experience placements associated with both the construction and operations of the wind farm. This commitment is subject to the Project achieving planning consent and proceeding towards FID and will be progressed once the employment opportunities arising from the wind farm are better known.	Addresses recommendation 9 of the SEAP and aligns with recommendation 13. Aligns with the Fair Employment objective specified within Aberdeenshire Council's Charter for Energy Development.
	O&G Workforce Transition Programme	MarramWind Ltd will to work with regional and / or national partners to develop a programme that actively support the transition of the Northeast workforce from the oil & gas sector into long-term, sustainable offshore wind carers. The programme will focus on supporting and enhancing pre-existing programmes where possible. This commitment is subject to the Project achieving planning consent and proceeding towards FID.	Addresses recommendation 15 of the SEAP and aligns with recommendation 16. Supports delivery of MarramWind's existing SCDS commitments. Aligns with the Fair Employment objective specified within Aberdeenshire Council's Charter for Energy Development.
	STEM Engagement and Career Inspiration	MarramWind Ltd will work with regional partners and stakeholders, such as Aberdeenshire Council, the Peterhead Developers Forum and Developing Young Workforce, to develop	Addresses recommendation 13 of the SEAP and aligns with recommendation 14.

		a STEM engagement and career inspiration programme for primary and secondary education. The programme will include participation in careers fairs and delivery of STEM workshop, coordinated with other energy developers where possible, so as to enhance existing provision in the Northeast. MarramWind Ltd's commitment to supporting STEM engagement is ongoing, but the implementation of a programme is subject to the Project achieving planning consent and proceeding towards FID.	Supports delivery of MarramWind's existing SCDS commitments. Aligns with the Fair Employment objective specified within Aberdeenshire Council's Charter for Energy Development.
	Supporting Better Outcomes for Care Leavers	MarramWind Ltd will seek to work with a range of regional partners and / or national partners to develop a STEM engagement and career programme designed to improve the life chances for children and young people in the social care system across Aberdeen City and Aberdeenshire. This will form part of MarramWind's broader STEM Engagement and Career Inspiration programme but will include additional interventions aimed at helping care experienced children and young people to build workforce skills and confidence. MarramWind Ltd's commitment to supporting STEM engagement is ongoing, but the implementation of a programme is subject to the Project achieving planning consent and proceeding towards FID.	Addresses recommendation 13 of the SEAP and aligns with recommendation 14. Supports delivery of MarramWind's existing SCDS commitments. Aligns with the Fair Employment and Equality objectives specified within Aberdeenshire Council's Charter for Energy Development.
Supporting and Enhancing Communities	MarramWind Community Benefit Fund	MarramWind Ltd will establish a community benefit fund to support projects and priories identified by communities local to the wind farm's onshore infrastructure. MarramWind will engage with community groups and other stakeholders to inform the focus and administration of the fund, which will launch around the time the wind farm becomes operational and is thus subject to the wind farm becoming operational. This funding may be used to support delivery of additional SEAP recommendations, such as the establishment of a Northeast small business fund (recommendation 5) and pre-employment grants (recommendation 7), should this align with the wishes of local stakeholders when the community benefit fund is implemented.	Addresses recommendation 17 of the SEAP and aligns with recommendations 5 and 7.

Ongoing Communications and Engagement	MarramWind Ltd will continue to keep communities and stakeholders appraised of progress with the wind farm project throughout the development period and into construction. The project will launch a dedicated newsletter and take part in at least one event per annum in Aberdeenshire, at which members of the public can meet and ask questions of the MarramWind project team. Delivery of this commitment is ongoing.	Aligns with recommendation 17 of the SEAP.
Transparent Reporting	MarramWind Ltd will report on progress made towards the development, implementation and delivery of the Socioeconomic Action Plan commitments on an ongoing basis. It is envisaged that annual progress reporting on the delivery of SEAP actions would commence within 12-18 months of the Project achieving planning consent, unless otherwise agreed with consenting bodies. MarramWind Ltd will also produce an updated version of the SEAP providing more detail on how SEAP actions will be delivered within 12-18 months of the Project achieving planning consent, after which the SEAP will be maintained and updated on an as needed basis, unless otherwise agreed with consenting bodies.	Aligns with recommendation 17 of the SEAP.
Supporting Charter for Energy Development in Aberdeenshire and maintaining the SEAP	MarramWind Ltd will continue to engage with Aberdeenshire Council and other relevant regional partners and stakeholder to explore future opportunities to support delivery of the Charter for Energy Development in Aberdeenshire. This will include updating the SEAP as MarramWind progresses towards construction and operation, when decisions are taken regarding the project's design that will enable future SEAP actions to be better tailored to specific opportunities arising from the windfarm. Delivery of this commitment is ongoing.	Aligns with recommendation 17 of the SEAP.

7.2 Next steps

AECOM would like to thank the MarramWind Ltd (ScottishPower Renewables) for commissioning this Socioeconomic Action Plan and for their continued collaboration throughout its development. Special thanks to the project team for their guidance and constructive feedback.

We are also grateful to the stakeholders who participated in engagement sessions, including representatives from Aberdeenshire Council, Moray Council, Highland Council, Peterhead Community Council, Energy Transition Zone, Buchan Development Partnership, Highlands and Islands Enterprise, and Scottish Enterprise. Their insights and feedback were invaluable in shaping the recommendations presented in this Action Plan.

Information on the development, implementation and delivery of the SEAP will be made available via the MarramWind website, which is available to view here: https://www.marramwind.co.uk

Stakeholders who wish to discuss the SEAP are invited to contact the MarramWind project team at: stakeholder@marramwind.com

Appendix A

Criterion	Score	Definition
Scottish supply track record	1	No Scottish capability
	2	Scottish capability, but no/limited success in offshore wind – 1 project or multiple in a similar sector
	3	Scottish capability, with some/moderate success in offshore wind - 2 commercial scale projects supplied
	4	Scottish capability, with considerable success in offshore wind - > 3 commercial scale projects supplied and multiple markets and evidence of supply to at least one GW scale project
Supply chain and technology maturity[91]	1	Global supply chain is mature
	2	Technology deployed at utility scale but supply chain still developing
	3	Technology deployed but at demonstration scale only
	4	Technology not deployed at full scale
Market readiness for commercial scale projects	1	Existing capacity or investment plans are not in existence or are at an early stage
	2	Companies have investment plans that are pending final investment decision that would enable them to supply a commercial scale project
	3	One company has either existing capacity or has made the final investment decision on an investment in new capacity that will enable it to supply a commercial scale project
	4	Two or more companies have existing capacity or have made the final investment decision on an investment in capacity that will enable them to supply a commercial scale project
Availability of Scottish expertise in parallel sectors	1	Scotland has no significant industrial expertise
	2	Scotland has relevant industrial expertise but is unlikely to be competitive in the offshore renewable energy sector
	3	Scotland has strong expertise in relevant parallel sectors but would require a shift in relevant company strategies to enter the offshore renewable energy market
	4	Scotland has world class expertise in sectors analogous to offshore renewable energy that can be readily exploited or is already applying significant expertise to the market
Logic of Scottish supply	1	There is no significant logic for Scottish supply to Scottish projects
	2	There is a limited logic for Scottish supply to Scottish projects
	3	There is a good logic for Scottish supply to Scottish projects
	4	There is strong logic for Scottish supply to Scottish projects
Scottish investment risk	1	Investments in Scotland can only be made with long-term confidence in the market and with public sector financial support
	2	Investments in Scotland need long-term confidence in the market
	3	Investment in Scotland can be triggered by framework contracts or two or more commercial scale orders
	4	Investment in Scotland is not needed or can be made with a single commercial scale order in the market

[91] The degree of maturity relates to how accessible a market is to new entrants: in more mature markets, entry is typically harder, and in less mature markets, there are generally greater opportunity for new entrants.

Glossary

Term	Definition
SEAP	Socioeconomic Action Plan – a framework developed to maximise the social and economic performance of MarramWind offshore wind farm.
SCDS	Supply Chain Development Statement – commitments made by MarramWind Ltd regarding supply chain investment and development.
NPF4	National Planning Framework 4 – the Scottish Government's statutory development plan influencing national planning decisions.
SIMD	Scottish Index of Multiple Deprivation – data tool used to identify deprived areas across Scotland.
OWSF	Offshore Wind Stimulus Fund – a fund established to support infrastructure and SMEs in the offshore wind sector.
SMEs	Small and Medium-sized Enterprises – businesses with fewer than 250 staff and turnover less than £44m.
CIB	Clean Industry Bonus – UK Government financial framework to support investment in shorter and cleaner supply chains.
SOWEC	Scottish Offshore Wind Energy Council – Scottish public-private sector partnership to support Scottish offshore wind growth.
OWIC	Offshore Wind Industry Council – UK public-private sector partnership to support UK offshore wind growth.
FA	Foundation Apprenticeship – education programme providing work-based learning for school pupils.
STEM	Science, Technology, Engineering and Maths – key disciplines required for offshore wind sector roles.
GVA	Gross Value Added – measure of economic output and productivity.
EPCI	Engineering, Procurement, Construction and Installation – contract model used in large infrastructure projects.
DESNZ	Department for Energy Security & Net Zero – UK Government department overseeing energy policy.
HIE	Highlands and Islands Enterprise – regional development agency supporting economic growth.
SE	Scottish Enterprise – national economic development agency.
STUC	Scottish Trade Union Congress – the national trade union centre in Scotland advocating for workers' rights and social justice.
ORE Catapult	Offshore Renewable Energy Catapult – innovation centre supporting offshore renewable technologies.
Meet the Buyer	Events designed to connect suppliers with contractors and developers to facilitate procurement opportunities.

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