



Nadara Limited

Millennium East Wind Farm

An extension to Millennium Wind Farm

Socio-economic Statement (SES)

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RSK



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ABBREVIATIONS

THC	The Highland Council
km	Kilometres
MW	Megawatts
m	Metres
SES	Socio-economic Statement
GVA	Gross Value Added
EIA	Environmental Impact Assessment
ECU	Energy Consents Unit
CEMP	Construction Environmental Management Plan
s36	Section 36
HwLDP	Highland-wide Local Development Plan
RQF	Regulated Qualifications Frameworks
NVQ	National Vocation Qualifications
CAPEX	Capital Expenditure
OPEX	Operational Expenditure

1 INTRODUCTION

- 1.1.1 Nadara Limited (formerly Renantis and hereafter referred to as “the Applicant”) is proposing to submit an application for consent to construct the Millennium East Wind Farm (hereafter referred to as “the Proposed Development”), as an extension to the existing Millennium Wind Farm.
- 1.1.2 The Proposed Development is located entirely within the administrative area of the Highland Council (THC) local planning authority. The Site¹ is located to the east of the existing Millennium Wind Farm, in the hills approximately 7.5 kilometres (km) west of Fort Augustus, 8 km north of Invergarry and 14 km south-west of Invermoriston.
- 1.1.3 The Proposed Development would involve the construction and operation of eight wind turbines (three with tip heights of up to 200 metres (m), and five with tip heights of up to 180 m) and associated infrastructure. Each turbine is likely to generate approximately 6.2 Megawatts (MW) of electricity. The total installed capacity of the Proposed Development is expected to be approximately 50 MW.
- 1.1.4 This Socio-economic Statement (SES) presents the findings of a socio-economic assessment which considers the potential socio-economic effects associated with the development, construction and operation of the Proposed Development. This includes consideration of employment generation and economic benefits.

¹ Refers to everything within the Site Boundary, which describes the red-line boundary.

2 LEGISLATION AND POLICY

2.1 Relevant Legislation

- 2.1.1 Currently, there is no specific legislation relevant to socio-economics. Therefore, this assessment is informed by the applicable planning context, guidance on best practice, as well as professional experience and industry standards.

2.2 Policy

- 2.2.1 National and local renewable energy and climate change targets, energy policies and planning policies are all material considerations when determining a s36 Application. The current policy context is supportive of renewable energy proposals that achieve a balance between environmental considerations and contributing to net-zero objectives, including a just transition. The acceptability of the Proposed Development, including consideration of socio-economic factors, has been considered in the stand-alone Planning Statement submitted in support of the s36 Application. This section identifies the planning policies that have informed the methodology for the SES.

National Context

National Performance Framework

- 2.2.2 The National Performance Framework (2023a) sits at the top of the policy hierarchy in Scotland, with all other policies and strategies designed to meet its purpose and outcomes. The purpose of the National Performance Framework is:

“To focus on creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing, and sustainable and inclusive economic growth”.

- 2.2.3 The National Performance Framework sets out 11 outcomes, underpinned by 81 indicators, which combine to give a better picture of how the country is progressing towards these goals.

- 2.2.4 The 11 national outcomes relate to people, and state:

- children and young people: grow up loved, safe and respected so that they realise their full potential
- communities: live in communities that are inclusive, empowered, resilient and safe
- culture: are creative and their vibrant and diverse cultures are expressed and enjoyed widely
- economy: have a globally competitive, entrepreneurial, inclusive and sustainable economy
- education: are well educated, skilled and able to contribute to society
- environment: value, enjoy, protect and enhance their environment

- fair work and business: have thriving and innovative businesses, with quality jobs and fair work for everyone
- health: are healthy and active
- human rights: respect, protect and fulfil human rights and live free from discrimination
- international: are open, connected and make a positive contribution internationally
- poverty: tackle poverty by sharing opportunities, wealth and power more equally.

National Strategy for Economic Transformation

- 2.2.5 In March 2022, the Scottish Government published the National Strategy for Economic Transformation (2022a), which sets out its ambition for the next decade, to create a wellbeing economy where society thrives across economic, social and environment factors. This strategy recognises that Scotland has substantial energy potential and that it has developed a growing green industrial base. This provides a strong foundation for securing new market opportunities arising from the just transition to Net Zero and will need continuing investment and support.

Draft Energy Strategy and Just Transition Plan

- 2.2.6 The Draft Energy Strategy and Just Transition Plan (2023b) emphasise how Scotland can leverage its renewable energy resources and drive economic development. Onshore wind development plays a pivotal role in realising this vision and objectives. The Plan restates the ambitious targets, set in the Onshore Wind: Policy Statement (2022b), for expanding onshore wind capacity to 20 Gigawatts (GW) by 2030. This expansion would strengthen Scotland's energy security and support job creation, economic growth and the transition away from fossil fuels. Both documents recognise the importance of maximising community benefits and ownership of renewable energy projects, ensuring that local communities actively participate in Scotland's Net-Zero energy future.

National Planning Framework 4

- 2.2.7 The Fourth National Planning Framework (NPF4) (2023c) is Scotland's national spatial strategy, setting out the principles to be applied to planning decisions, regional priorities and national developments.

- 2.2.8 As one of the National Developments supporting the delivery of sustainable places, the 'Strategic Renewable Electricity Generation and Transmission Infrastructure' strategy plays a crucial role in enhancing energy security and facilitating Scotland's transition to a low-carbon economy. In NPF4, it is stated that this strategic policy:

'Supports electricity generation and associated grid infrastructure throughout Scotland, providing employment and opportunities for community benefit, helping to reduce emissions, and improving security of supply.'

- 2.2.9 National developments reflect Scotland's priorities for sustainable development and inclusive growth. The expansion of the renewable energy industry is a key National Development.

Within the context of socioeconomics, the Proposed Development aligns with the guidance outlined in Policy 11 – Energy, and Policy 25 – Community wealth building.

- 2.2.10 Policy 11 – Energy, of the National Planning Framework provides a robust framework for supporting renewable energy developments, emphasising the need to accelerate the transition to low-carbon energy systems while ensuring that projects are sustainable, environmentally responsible, and aligned with national climate targets. According to NPF4’s policy 11(a), all forms of renewable technologies, including onshore wind and energy storage, will be supported. This is subject to the test outlined in Policy 11(c), which states:

“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”.

- 2.2.11 However, in the recent letter published by the Chief Planner entitled ‘Planning – work programme update: Chief Planner and Ministerial letter – September 2024’ (2024a), it was made clear that community benefits are a voluntary arrangement. The letter states:

“The Scottish Government is clear that community benefits are a well-established and integral part of onshore renewable energy developments in Scotland, supported by the Scottish Government’s Good Practice Principles. We are, however, clear that these are voluntary arrangements that sit independent of our planning and consenting systems, and NPF4 policy 11(c) does not alter this.”

- 2.2.12 Policy 25 – Community Wealth Building, of the National Planning Framework promotes community wealth building by encouraging local investment, economic resilience, and inclusive growth, ensuring that the benefits of development projects, including renewable energy initiatives, are shared equitably within local communities, fostering long-term sustainability and social well-being.

- 2.2.13 According to NPF4’s policy 25 (a), Developments which contribute to local or regional community wealth building strategies and are consistent with local economic properties will be supported. In addition, Policy 25 (b) states:

“b) Development proposals linked to community ownership and management of land will be supported.”

- 2.2.14 To comply with NPF4, the Proposed Development will support employment and create opportunities for local businesses at both the construction, and operation and maintenance phases. This report provides an estimate of net socio-economic effects, and a list of commitments intended to maximise the local benefits from the Proposed Development. There is no specific guidance on maximising net economic impact in the context of NPF4.

Onshore Wind Sector Deal and Onshore Wind Policy Statement

- 2.2.15 Scottish renewable energy policy, including the Onshore Wind Sector Deal (2023d) and the Onshore Wind: Policy Statement (2022b), sets out the commitment from Scottish Government and the onshore wind sector to reach 20 GW of onshore wind by 2030, ensuring the maximisation of benefits to Scotland. These documents highlight the increased potential

of onshore wind for a low-carbon and prosperous future, driving economic growth, creating better job opportunities, and benefitting communities in Scotland.

- 2.2.16 These documents demonstrate the Scottish Governments support for strengthening domestic supply chains, developing sector-specific skills and improving the circular economy of the industry as a means of socio-economic development. These documents highlight the potential of onshore wind industry to support this socio-economic development through reducing reliance upon international imports and increasing the opportunities for the local workforce.

Scottish Government Good Practice Principles for Community Benefits from Onshore Renewable Energy Developments

- 2.2.17 The Scottish Government's Good Practice Principles for Community Benefits from Onshore Renewable Energy Developments (2018) outlines voluntary guidelines for delivering meaningful community benefit schemes. These benefits, typically financial contributions of the value equivalent to £5,000 per MW annually, may also include in-kind support or shared ownership opportunities.

- 2.2.18 It is acknowledged by the Scottish Government that future community benefits packages will be more flexible. However, the document states that:

"The Scottish Government would encourage the renewables industry to offer a package of benefits that is of the equivalent value to £5,000 per MW".

- 2.2.19 This document also encourages active engagement with communities, ensuring benefits align with local priorities and are managed sustainably, often through community trusts. The focus is on long-term impact, supporting national objectives such as net-zero goals and rural development. These principles promote collaboration, flexibility, and community-led decision-making to maximize local advantages from renewable energy projects.

Local Context

Highland-wide Local Development Plan

- 2.2.20 The Highland-wide Local Development Plan (HwLDP) (2012a) was adopted by THC in 2012. Relevant policy criteria are taken forward in the Local Development Plan's Policy 67 Renewable Energy Developments and supporting supplementary guidance, Onshore Wind Energy: Supplementary Guidance (OWESG) (2017). The OWESG outlines that wind energy proposals within the Highlands should:

- research into the potential effects of wind farms on tourism and recreation
- illustrate the potential for socio-economic benefits to be derived from development proposals. A key aspect of this will be engaging with local communities to better understand local needs and issues
- identify the potential for effects on industries for which Highland's landscape is important – for example tourism and recreation

- highlight the potential for secondary effects for tourism and recreation, such as a change in land use that causes adverse effects, for example, a change from forestry to a wind farm, or where there are potential benefits like improved public access in the area. It is important to consider the impact of proposed wind energy development not only on existing land uses, but also those permitted, or which are included as specific proposals in the Local Development Plan (LDP).

Highland Outcome Improvement Plan

- 2.2.21 In line with the Community Empowerment (Scotland) Act 2015 (2015), THC formed a community planning partnership, Highland Community Planning Partnership, which is responsible for preparing and publishing a local outcome improvement plan. The Highland Outcome Improvement Plan (HOIP) (2024) set out strategic priorities for the region between 2024-2027 to improve the quality of life for people living across the Highlands.
- 2.2.22 The objective of the HOIP is to become a strategic plan and framework for the Highlands, and in doing so to maximise the utilisation of resources and opportunities whilst helping to reduce inequalities existing throughout local communities. To achieve this, three strategic priorities have been identified:
- People – Enable people to live independently, safe and well within their community
 - Place – Work in partnership to develop sustainable and resilient local communities
 - Prosperity – Creating opportunities for all people and places to thrive economically.
- 2.2.23 Based on the principles outlined in the HOIP, the development of the Highland's renewable energy industry could contribute to the strategic priorities set out by the Highland Community Planning Partnership. This is particularly relevant when considering the agreed principles for "Place" and "Prosperity" which state:
- Place
 - *"We will ensure just transition and support to communities to adapt to climate change will be considered when promoting sustainability and resilience."*
 - Prosperity
 - *"We will integrate and align our people, investment and financial resources to maximise opportunities for Highland."*
 - *Innovation and technology will be central to evolving service delivery and support across Highland."*
 - *We will strengthen our partnership by encouraging involvement from our business and social enterprise sectors."*

Community Wealth Building Strategy

- 2.2.24 THC adopted their Community Wealth Building Strategy (2024) to set out a three-year vision for embedding THC's community wealth building strategy into the planning process.
- 2.2.25 The proposed vision for the strategy is stated as:

“Retain greater wealth and maximise spending within and for the communities of the Highlands”.

2.2.26 To achieve this, the Community Wealth Building Strategy sets out five key objectives which promote community wealth building. The objectives of relevance to renewable energy developments and how they can maximise local benefits are:

- Objective 2: Fair Employment – As part of their strategy to develop a future workforce, THC are committed to working with public and private sector partners to coordinate employment opportunities so that they can sustain communities, develop growth in key clusters, sectors and geographical areas to grow and retain talent
- Objective 3: Land and Property – THC will look to collaborate with developers, businesses and communities to create and cultivate a true sense of local ownership and realise a just transition that benefits are shared equitably while tackling the climate and biodiversity emergency
- Objective 4: Financial Power – THC recognises that by working together to maximise the outcomes of community benefit funding from renewables, the renewables industry, public sector agencies and communities, have the potential to realise significant and long lasting, social and economic benefits for Highland communities. This also includes prioritising internal investment in the local supply chain.

2.2.27 Whilst only at the draft stage, the Community Wealth Building Strategy is intended to align with planning policy and work in tandem with other strategy documents acting as expressions of local community aspirations.

Community Benefit Policy

2.2.28 The Highland Council Community Benefit Policy (2013) outlines how communities and developers can collaborate to ensure that local areas maximise community benefits from new developments, and that these funds are channelled into maximising community wealth building.

2.2.29 The Community Benefit Policy is guided by four principles for all renewable energy developments:

- community plans are developed to guide expenditure
- communities invest Community Benefit to generate sustainable income
- communities are enabled to invest Community Benefit in service provision and asset management and acquisition
- community Benefit is available to local communities and to communities across Highland.

2.2.30 With a more specific focus on onshore wind developments, the Community Benefit Policy sets out THC’s position on the provision of the equivalent of £5,000 per MW of installed turbine capacity per annum and the decision-making process for how funds are allocated across local communities. The Applicant has a long-standing record of supporting local communities through community benefit funding. Community benefit funding from the existing Millennium Wind Farm to the Fort Augustus and Glenmoriston Community Company and Glengarry Trust has enabled transformational projects and opportunities for the local community, including low-cost housing and a medical centre. In addition, the Great Glen

Energy Co-operative has allowed local residents to invest in the wind farm, and continues to provide annual returns to its members while supporting local initiatives, such as a £18,000 contribution in 2024 to the Loch Ness Hub for electric hire bikes, helping to reduce car use in the area. Moving forward, the Applicant intends to provide at least £5,000 per MW per annum into a community benefit fund, in line with standard industry practice, for the operational lifetime of the Proposed Development. The community benefit fund will also be extended to cover the community of Dalchreichart as well as Fort Augustus and Invergarry.

The Highland Council Social Value Charter

- 2.2.31 At a meeting on 27 June 2024², THC adopted a Social Value Charter (SVC) which aims to maximise the opportunities and social value of renewable energy projects in the local community. The SVC includes a nine-point plan which articulates the expectations of the Highland area for any renewables and green energy developments, with the following stated aims:
- “Embed an approach to community wealth building into Highland;
 - Maximise economic benefits from our natural environment and resources;
 - Engage and involve relevant stakeholders to understand how we can continually improve our impact; and
 - Unlock economic opportunities for the area”.
- 2.2.32 The SVC encourages developers to consider how projects can improve local economic outcomes through the opportunities inherent to renewable energy construction and operation, as well as the inclusion of further measures such as community benefits that support local economic development and/or projects in line with relevant policies and plans such as, the Highland Investment Plan, Highland Project Bank, Highland Outcome Improvement Plan, Community Planning Partnerships, and Community Wealth Building Strategy.
- 2.2.33 As stated above, community benefit remains a voluntary arrangement, and the SVC remains under discussion between public and private stakeholders in the renewables industry. The Applicant has already been involved in positive and ongoing discussions about the SVC and related opportunities to maximise local community benefits in the future.

Additional action plans and strategies

- 2.2.34 In addition to the above relevant policy, legislation, strategies, plans and guidance, this assessment has considered the following documents as applicable:
- National:
 - Programme for Government 2019 to 2020 (2019).
 - Local:
 - The Highland Council Net Zero Strategy (2023).

² Full report is detailed under ‘Item 10: Social Value Charter for Renewables Interest’. Accessed via the following link: https://www.highland.gov.uk/meetings/meeting/5003/highland_council

- Action Plan for Economic Development in Highlands (2012b).
- Highlands and Islands Enterprise 2023 - 2028 Strategy (2023).

3 APPROACH TO ASSESSMENT

3.1 Purpose of Assessment

- 3.1.1 In a scoping report submitted to the Energy Consents Unit (ECU) in January 2024, it was proposed that a socio-economic assessment would be conducted and included as a chapter within the Environmental Impact Assessment (EIA) Report. However, following further consultation, it was proposed that socio-economics, tourism, recreation and land-use be scoped out of the EIA Report. This was based on evidence which indicated that significant effects in EIA terms are unlikely to occur. Instead, RSK proposed that a standalone SES would be provided to consider the anticipated effects of the Proposed Development, including employment generation and other economic effects, whilst meeting the relevant policy considerations.
- 3.1.2 The consultation process confirmed the approach to the SES, as shown in **Table 3.1**. It was confirmed with the ECU, that the SES would focus solely on the socio-economic effects of the Proposed Development, whilst the visual effects on local tourism and recreation assets would be covered within **Chapter 5: Landscape and Visual** of the EIA Report.
- 3.1.3 Accordingly, the scope and approach of this SES is focused on evaluating on the socio-economic effects likely to arise during the construction and operational phases of the Proposed Development.

3.2 Consultation

- 3.2.1 The scoping consultation received by the ECU and THC indicated that the consultees were satisfied with the intended approach to socio-economics detailed in the consultation following the receipt of scoping responses. See **Table 3.1** for the further information of response receive and actions taken by the Applicant.

Table 3.1: Consultation responses

Scoping Consultee	Comments received / issues received	Action required / taken
The ECU Emailed response: 4 October 2024	The ECU are content with your proposed approach that socio economics, tourism, recreation, and land-use issues can be scoped out of the EIA, on the basis that the evidence indicates significant effects are unlikely to occur from the proposed Development and instead a SES being submitted alongside the application. Also, a Planning Statement that fully considers the proposed Development in the context of planning and other policy objectives being prepared and forming part of the planning application documentation.	A socio-economic statement (SES) looking solely at the economic impacts has been prepared and is included in this report. The scope of the SES is summarised in Section 3.3 . Assessment of the visual impact on tourism assets and the recreational receptors are

Scoping Consultee	Comments received / issues received	Action required / taken
		to be assessed in Chapter 5: Landscape and Visual .
The Highland Council (THC) (Scoping: 13 March 2024)	We consider that Socio-Economic, Tourism and Recreational impacts should have their own chapter in the EIAR to ensure that these matters are appropriately addressed and not lost in other assessments. The EIAR should estimate who may be affected by the development, in all or in part, which may require individual households to be identified, local communities or a wider socio-economic groupings such as tourists and tourist related businesses, recreational groups, economically active, etc. The application should include relevant economic information connected with the project, including the potential number of jobs, and economic activity associated with the procurement, construction, operation and decommissioning of the development. In this regard wind farm development experience in this location should be used to help set the basis of likely impact. This should set out the impact on the regional and local economy, not just the national economy. Any mitigation proposed should also address impacts on the regional and local economy.	The ECU case officer has confirmed that socio-economic can be scoped out of the EIA as significant effects are not likely and that a stand-alone Socio-economic Statement (SES) is acceptable to be submitted with the application. This SES considers the potential socio-economic effects associated with the development, construction and operation of the Proposed Development. This includes consideration of employment generation and economic benefits at a local, regional and national level. Section 3.3 of this report includes further justification on the rationale for excluding certain aspects of the Proposed Development's socio-economic effects from this assessment. Assessment of the visual impact on tourism assets and the recreational receptors are to be assessed in Chapter 5: Landscape and Visual.

3.3 Scope of Assessment

Receptors/matters scoped into assessment

Net socio-economic effects during construction and operation

- 3.3.1 The assessment considers the potential net employment and economic effects (direct, indirect and induced) during the construction and operational phase of the Proposed Development.

- 3.3.2 To evaluate the economic impact from project expenditure during construction and operation, an input-output model was used to calculate the direct, indirect and induced effects of localised economic activity on the overall economy. Each of these effects can be described as follows:
- Direct effects - describes when the socio-economic effects are directly attributable to the Proposed Development, such as supporting jobs and companies involved in the Proposed Development.
 - Indirect effects – describes when the Proposed Development generates socio-economic benefits for indirect sectors such as benefits for suppliers and contractors.
 - Induced effects – describes when the socio-economic benefits felt directly and/or indirectly are re-distributed to additional parties, such as construction workers spending wages in local businesses.
- 3.3.3 The model generates the Gross Value Added (GVA) to the economy and the 'job years' of employment supported within the economy. These metrics are used as economic indicators of the socio-economic impacts of the Proposed Development at a regional and national level and are defined as follows:
- GVA – used to measure the contribution to an economy of an individual producer, industry, sector or region.
- 3.3.4 Job years - Describes the total number of 12-month (1 year) periods worked on a project across all employees. (i.e. 50 job years could be either 2 employees working for 25 years each or 5 employees working for 10 years each). Socio-economic effects outside of the proposed study areas, characterised in **Section 3.4**, have not been considered within this assessment.

Impact on Road Users

- 3.3.5 The impacts of the Proposed Development on the local road networks and traffic volumes have been considered within **Chapter 10: Traffic and Transport**. Whilst there would be temporary increases in traffic volumes on the A87, A82, A830 and A887 during the delivery of turbine components and other construction materials on Site, with appropriate mitigation measures in place, these effects are predicted to be not significant. Full details of the traffic and transport impacts of the Proposed Development are discussed in **Chapter 10: Traffic and Transport**, and measures identified within this EIAR would be detailed in a Construction Traffic Management Plan (CTMP) which would be required through an appropriately worded planning condition after consent is granted. This CTMP would be based on the outline CTMP which is submitted with the EIAR as **Technical Appendix 10.1**.

Receptors / matters scoped out of assessment

- 3.3.6 As this assessment focuses exclusively on socio-economic effects, it does not consider access, recreational, or tourism assets/receptors or the tourism economy. Visual effects on specific recreational and tourism assets are instead addressed in **Chapter 5: Landscape and Visual**.

- 3.3.7 The rationale for excluding certain aspects of the Proposed Development's socio-economic effects from this assessment is outlined below, providing explanations for their omission from detailed consideration in the SES.

Tourism Economy

- 3.3.8 Tourism and recreation assessments focus on the tourism economy, as defined by the spending of visitors and the employment supported by the sector. For a change in spending to take place, it is necessary that, because of a wind farm development, visitors change their behaviour. This may result, for instance, in deciding not to visit the area, not recommending the area or not visiting again. In turn, this decision has to lead to a fall in the employment and spending by visitors at a given attraction or accommodation provider.
- 3.3.9 As recorded in visitors' surveys, visitors tend to spend time in a given area for a range of reasons. These include, for instance, scenery and landscape; history and culture; and the place's reputation.
- 3.3.10 The interaction between the susceptibility to change of an attraction and the extent to which it will be impacted by the development determine the wind farm's relative impact. For these changes to have an effect, it is then required that they have an impact on the tourism economy, through reduced spending and a reduction in the employment supported by the sector.
- 3.3.11 Over time, a series of studies have considered the relationship between wind farm developments and the tourism economy.
- 3.3.12 A study of the 'Economic impacts of wind farms on Scottish tourism' (2008) undertaken by the Moffat Centre at Glasgow Caledonian University. The study was based on what could happen and found that, although there may be minor effects on tourism providers and a small number of visitors may not visit Scotland in the future, the overall effect on tourism expenditure and employment would be very limited. The report went on to state that:
- "The negative impact of wind farms on tourism at the national level is small, and any reduction in employment in tourism will be less than the numbers currently directly employed in the wind power industry."*
- 3.3.13 Since this study, wind farms have become a more common feature in Scotland and any negative effects on the tourism economy because of their existence would now be apparent.
- 3.3.14 In 2021, BiGGAR Economics produced a report analysing the relationship between the construction of onshore wind farms and tourism employment at the national, regional and local level (BiGGAR Economics, 2021)
- 3.3.15 Nationally, the report found that, while Scotland had experienced a significant increase in onshore wind energy (with the number of turbines increasing from 1,082 in 2009 to 3,772 in 2019) employment in tourism-related sectors had increased by 20 %. At the local authority level, those which had seen the largest increase on onshore wind energy also experienced increases in tourism employment equal to, or greater than other areas across Scotland.

- 3.3.16 The report included case studies of 44 onshore wind farms constructed between 2009 and 2019. This included an updated analysis of 28 wind farms included in an earlier report (BIGGAR Economics, 2017) constructed prior to 2015, and 16 additional wind farms constructed between 2015 and 2019. The study reported on changes in tourism-related employment in the small areas within 15 km of each wind farm. Of the 28 wind farms previously analysed, the surrounding local areas of 18 experienced an increase in tourism employment above the Scottish average in the years following the construction. Of the 16 local areas surrounding the additional 16 onshore wind farms, 11 experienced increases in tourism employment which outperformed the Scottish average. These results suggested that tourism employment in local areas across Scotland changed independently of wind farms found in the area.
- 3.3.17 The report concluded that, there was no pattern or evidence suggesting that the development of onshore wind farms in Scotland had any negative effects on the tourism economies of the country, local authority areas or the immediate areas surrounding wind farms.
- 3.3.18 These conclusions are not unexpected given that:
- there are high levels of public support for renewable energy (BEIS, 2022);
 - as wind farms are well-established in Scotland, tourists might already expect to see wind farms when visiting Scotland, especially rural Scotland;
 - the factors that determine the success of the tourism sector do not include the presence or otherwise of an onshore wind farm; and
 - issues that influence tourism include the ability and willingness to travel, economic performance (and so whether tourists have disposable income available for leisure trips), exchange rates, the quality of the overall tourism product, the effectiveness of destination marketing and the quality and value for money of the services offered by tourism businesses.
- 3.3.19 Based on the evidence outlined in this section, no further assessment of the Proposed Development's effect on tourism related economic or employment benefits is assessed within this SES.

Access (Direct recreational impacts)

- 3.3.20 During construction, there could be temporary direct impacts affecting accessibility of recreational routes within the Site.
- 3.3.21 In accordance with the Construction (Design and Management) Regulations 2015 (2015), notices would be placed in prominent locations around the Site to outline areas of restricted access, as well as information such as details of alternative arrangements, routes.
- 3.3.22 Measures for ensuring public safety during construction would be secured by the Construction Environmental Management Plan (CEMP), and periods of exclusion would be kept to the minimum necessary for safe working. The CEMP would set out measures to ensure that recreational users are informed of the construction work and directed into safe areas where there would be no conflict with plant and machinery. Therefore, it is not considered that there is potential for significant direct effects on recreational receptors during construction.

- 3.3.23 Furthermore, it is acknowledged that the HwLDP requires an Access Management Plan for Major developments (The Proposed Development does not classify as a Major development, but a Plan is usually expected for National developments by THC). It is not considered that an Access Management Plan is required as part of the s36 application and this could be controlled through a planning condition as required. It is considered that the reasoning above and the final design detail that will be submitted with the application will provide sufficient information, including existing public, non-motorised public access footpaths, bridleways and cycleways on the Site, together with proposed public access provision, both during construction and after completion of the development (including links to existing path networks and to surrounding area, and access points to water) to understand the likely access impacts and mitigation measures proposed.

Wider economic effects

- 3.3.24 Wider economic benefits have not been considered in the assessment, as they are more speculative and reliant upon local businesses responding to the opportunities available.
- 3.3.25 Furthermore, regarding the potential benefits to the supply chain, the Proposed Development provides opportunities for the involvement of suppliers from the Highlands and Islands, and wider Scotland. The range of activities that suppliers can be involved in include research and development, design, project management, civil engineering, component fabrication and/or manufacture, installation and maintenance. There is expertise in all of these areas in the wider region, although a full wind energy supply chain covering all aspects of wind turbine component manufacture has not yet been developed within the region or indeed within Scotland as a whole. In Scotland, there are currently several wind turbine manufacturing plants in Inner Moray Firth, and in the Highlands.
- 3.3.26 A key contextual consideration has been, with an increasing number of wind farm schemes either operational, under development or having gained consent in Scotland, the commercial viability, and job prospects amongst Scottish supply chain firms has improved. Cluster benefits in the industry increase where firms are supported by the spending of other firms within the renewables sector. The net effect is to increase business and employment opportunities within Scotland's renewable energy sector, boosting the performance of regional and national economies.
- 3.3.27 In addition, during the construction process, there would be opportunities for those employed to develop skills that would be of benefit to the local economy and local businesses in the longer term. Further, employment generated through the Proposed Development would contribute to diversifying the local economy and help support the retention of the working age population within the Highlands.

Effects on Community Services

- 3.3.28 Given the relatively short-term construction programme and limited construction workforce it is unlikely that there would be a significant impact on the demand for housing, health or educational services so effects on community services during construction have been scoped out. Furthermore, once constructed, only a small workforce would be involved in the

operation and maintenance of the Proposed Development and therefore, it is unlikely that any additional demands on community services would be created by the Proposed Development.

Decommissioning effects

- 3.3.29 As decommissioning is likely to constitute a reversal of the activities undertaken during the construction phase, it is considered that the likely effects on land use, recreation and tourism would be the same during the decommissioning of the Proposed Development.
- 3.3.30 In relation to employment and economic effects, while there have been recent studies, including Zero Waste Scotland's 'The future of onshore wind decommissioning in Scotland' (2023), there is still an absence of data regarding the likely decommissioning expenditure involved. Furthermore, as the operational life of the Proposed Development is expected to be up to 35 years, it is recognised that standard industry practice, policies and guidance will change, meaning that no descriptive decommissioning plans can be prepared at this stage. On this basis, it is proposed that the effects of decommissioning are scoped out of this assessment.

Land use

- 3.3.31 The footprint of the Proposed Development would only comprise a small percentage of the overall site. Furthermore, through the proposed measures outlined in **Chapter 6: Ecology** and the Outline Biodiversity Enhancement Management Plan (**Technical Appendix 6.7**) of the EIAR, there would be no net loss of resources onsite and the land would be managed more sustainably with no adverse impacts on current land use.

3.4 Assessment Methodology

Guidance

- 3.4.1 There is no specific guidance available on the methods that should be used to assess the socio-economic impacts of a proposed renewable energy development. The approach taken is based on an input-output model that is commonly used for assessments of this nature and is consistent with Scottish Government's 'Draft Advice on Net Economic Benefit and Planning' (2016).

Study areas

- 3.4.2 The study areas for this assessment are based on pre-defined regional areas and administrative geographies. The baseline description and assessment of socio-economic impacts considers the following areas:
- the Highlands (regional study area)
 - Scotland (national study area).

Baseline determination

- 3.4.3 Baseline conditions have been determined using desk-based survey techniques, including publicly available statistics and information. Data sources referred to in undertaking this assessment are referenced in full in this assessment. No specific field survey has been undertaken regarding potential socio-economic effects.

Desk-based assessment

Input – Output Model Methodology

- 3.4.4 To evaluate the socio-economic impact from project expenditure during both the construction and operation of the Proposed Development, an input-output model was used to calculate the direct, indirect and induced effects of localised economic activity on the overall economy and job creation for the Highlands and Scotland.
- 3.4.5 The socio-economic impact of the construction phase was then estimated for each study area. The proportion of each type of contract that might be secured in each of the study areas was estimated using assumptions which were based on the average from RenewableUK's research (2015; 2021), analysis of the industries and professions available in each study area and RSK's previous experience undertaking socio-economic analysis for other wind energy projects, particularly those in the Highlands.
- 3.4.6 The GVA per head for civil engineering related projects in the Highlands and Scotland was used to calculate the economic effect of new jobs. These GVA figures were sourced from the Scottish Annual Business Statistics datasets (Scottish Government, 2024b). The economic impact assessment also accounts for additionality factors and multiplier effects to provide a net economic impact figure at the regional and national levels.
- 3.4.7 Having applied the multiplier and additionality factors to the model, the sum of direct, indirect and induced benefits could be estimated. These values are provided as the total GVA and employment supported by the Proposed Development's construction and operational phases.
- 3.4.8 A similar model and methodology were used for the co-located renewable technologies of the Proposed Development, with the analysis drawing on the experience of deployment of this technology elsewhere across Scotland and the UK.

Difficulties and Uncertainties

- 3.4.9 There can be lags in the publication of economic statistics used for the baseline since the organisations that publish the data require time to collect, analyse and publish statistics. Throughout the report, the most recent statistics available from these sources have been used to ensure robustness of the assessment.

4 EXISTING BASELINE

4.1 Population

- 4.1.1 Based on mid-year population estimates by the National Records of Scotland for the year 2022, the Highlands population was 235,710 or 4.4 % of Scotland's total population of 5,490,100 (National Records of Scotland, 2024, 2022).
- 4.1.2 The total population for each area was disaggregated into different age groups in **Table 4.1**. In general, the proportion of the Highlands population considered to be of 'working age' (i.e. between 16 – 64 years old) is approximately 4.3 % less than that of Scotland as a whole. Furthermore, the Highlands has a higher proportion of the total population aged 65+, when compared to the national population.

Table 4.1: Population by age group^{3,4}

Age group (years)	the Highlands		Scotland	
	Number of people	% of total population	Number of people	% of total population
0-15	37,245	15.8	894,695	16.3
16-64	142,307	60.4	3,549,877	64.7
65+	56,158	23.8	1,045,528	19.0
Total Population	235,710	100.0	5,490,100	100.0

4.2 Population Projections

- 4.2.1 Population trends (as shown in **Table 4.2**) project that the Highlands population will decline. As estimated by the Office for National Statistics, between 2018 – 2043 the population of the Highlands is projected to reduce by around 1 %, from 235,540 to 233,250 (National Records of Scotland, 2020). This trend contrasts those observed at the national level, where the Scottish population is expected to increase by approximately 2.5 % (National Records of Scotland, 2020).
- 4.2.2 The proportion of the Highlands's residents projected to be characterised as of 'working age' is expected to increase. By 2043, it is expected that approximately 59 % of the Highlands's population will be of working age, compared to approximately 63 % across the whole of Scotland.

³ Source: National Records of Scotland (2024), Highland Council Area Profile – mid 2022 Population Estimates by Council Area in Scotland.

⁴ Source: National Records of Scotland (2024), Mid-2023 Population Estimates Scotland.

- 4.2.3 The proportion of residents aged 65 years and over is expected to increase by 2043 to approximately 27.8 % of the total population in the Highlands from a current figure of 22.7 %, whilst the proportion of the Scottish population is expected to reach 22.8 % from a current figure of 19 %.

Table 4.2: Population projections from 2018-2043 at the Regional and National Scale⁵

Age group (years)	the Highlands		Scotland	
	% of total population in 2043	Change in proportion of population from 2018 to 2043	% of total population in 2043	Change in proportion of population from 2018 to 2043
0-15	13.5	-2.1	14.2	-2.1
16-64	58.7	-2.9	63.0	-1.7
65+	27.8	5.1	22.8	4.2

4.3 Employment by Industry

- 4.3.1 The employment structure of the Highlands, and Scotland, as reported by is displayed in **Table 4.3**. As reported by the Office for National Statistics labour market profile for the Highlands, the largest employer in the Highlands is in Human health and social work activities which employs approximately 17.7 % of the total workforce. This is slightly higher than when compared to Scotland, where approximately 16.2 % of the workforce work within this sector (Office for National Statistics, 2024).
- 4.3.2 Furthermore, when comparing the distribution of the Highlands workforce to Scotland across sectors, the following industries employ a higher proportion of the total workforce:
- Construction;
 - Utilities;
 - Water Supply; sewage, waste management and remediation activities;
 - Wholesale and retail trade; repair of motor vehicles and motorcycles;
 - Transportation and storage;
 - Accommodation and food services; and
 - Arts, entertainment and recreation.

Table 4.3: Employment by industry⁶

Industry	the Highlands (%)	Scotland (%)
Mining and quarrying	0.4	1.0

⁵ Source: National Records of Scotland (2020), Population Projections for Scottish Areas (2018-based).

⁶ Source: Office for National Statistics (2024), Labour Market Profile – Highland – Employee jobs (2023).

Manufacturing	5.3	7.0
Electricity, gas, steam and air conditioning supply (Utilities)	0.9	0.8
Water supply; sewage, waste management and remediation activities	2.2	0.8
Construction	6.2	5.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	14.2	13.3
Transportation and storage	5.3	4.6
Accommodation and food service activities	13.3	8.8
Information and communication	2.0	3.2
Financial and insurance activities	0.7	3.3
Real estate activities	1.3	1.4
Professional, scientific and technical activities	5.3	7.3
Administrative and support service activities	5.3	7.0
Public administration and defence; compulsory social security	5.3	6.5
Education	8.0	8.5
Human health and social work activities	17.7	16.2
Arts, entertainment and recreation	3.5	2.80
Other service activities	1.3	1.70
Agriculture, forestry and fishing	n/a	n/a
Total Employment	98.2*	99.3*

*Percentages are presented as stated at source, errors may be due to exclusion of sectors, miscalculation or rounding errors.

4.4 Supply Chain

Business Size

- 4.4.1** Recent robust baseline data relating to the local supply chain is not available and so the statistics outlined in **Table 4.4** shows the proportion of businesses within the Highlands and Scotland based on the number of employees.
- 4.4.2** The proportion of private sector registered businesses in the Highlands that are micro-sized (0-9 employees) is 88.4%, which is similar to the national figure of 88.1 % (Office for National Statistics, 2024). This trend is consistent across all business sizes, with the Scottish Economy having a greater proportion of large businesses when compared to the Highlands.

Table 4.4: Size of businesses⁷

Business Size (number of employees)	the Highlands		Scotland	
	Number of businesses	Proportion of total businesses (%)	Number of businesses	Proportion of total businesses (%)
Micro (0 – 9)	9,580	88.4	159,639	88.1
Small (10 – 49)	1,085	10.0	18,030	9.9
Medium (50 – 249)	150	1.4	2,895	1.6
Large (250+)	25	0.2	705	0.4
Total Number of Businesses	10,840	100.0	181,269	100.0

Employment by occupational group

4.4.3 Current employment by occupational group in the Highlands and Scotland as reported by the Office for National Statistics (2024), is displayed in **Table 4.5**. This provides an indication of the wider supply chain. Employment rate by occupational groups which are relevant to the construction and operation of the Proposed Development include:

- Professional occupations (22.1 %), which is lower than at a national level (26 %);
- Associate professional and technical (12.5 %), which is lower than the national level (15.5 %);
- Skilled trades occupations (11 %), which is higher than the national level (9.3 %); and
- Process plant and machine operatives (8.2 %), which is higher than the national level (5.4 %).

Table 4.5: Employment by occupational group⁸

Occupational group	the Highlands (Numbers)	the Highlands (%)	Scotland (%)
Managers, directors and senior officials	12,500	10.9	8.3
Professional occupations	25,400	22.1	26.0
Associate professional & technical	14,300	12.5	15.5
Administrative & secretarial	9,900	8.6	9.5
Skilled trades occupations	12,700	11.0	9.3
Caring, leisure and other service occupations	12,100	10.5	9.4

⁷ Source: Office for National Statistics (2024), Labour Market Profile – Highland – UK Business Counts (2023).

⁸ Source: Office for National Statistics (2024), Labour Market Profile – Highland – Employment by Occupation (July 2023 – June 2024).

Occupational group	the Highlands (Numbers)	the Highlands (%)	Scotland (%)
Sales and customer service occupations	n/a	n/a	6.3
Process plant & machine operatives	9,400	8.2	5.4
Elementary occupations	18,600	16.2	9.8
Total	114,900	100	100

4.5 Economic Activity

- 4.5.1 As shown in **Table 4.6** the unemployment rate in the Highlands for 2023 was 0.9 % lower than the rate observed across Scotland.
- 4.5.2 Furthermore, when looking at the economic activity rate, the Highlands had a 1.4 % higher proportion of its working-age population employed when compared to Scotland.
- 4.5.3 In addition, based on 2023 statistics, the Highlands has a similar wage economy to Scotland, with residents of the Highlands receiving a lower gross weekly pay (when considering full-time workers only) of £733 compared to £740 across Scotland.

Table 4.6: Economic activity rates and gross weekly pay⁹

Economic activity	the Highlands	Scotland
Economic activity rate (%)	78.5	77.1
Unemployment rate (%)	2.8	3.7
Gross Weekly pay (£)	733.2	740.0

4.6 Skills and Qualifications

- 4.6.1 The percentage of the region's population holding qualifications under Regulated Qualifications Frameworks (RQF) and National Vocation Qualifications (NVQ) when compared to nationally is provided in **Table 4.7**.
- 4.6.2 The definitions for each of these categories, as outlined by the Office for National Statistics, are as follows:
- RQF/ NVQ1 – intermediate 1 national qualification (Scotland) or equivalent.
 - RQF/NVQ2 – intermediate 2 national qualification (Scotland) or equivalent.
 - RQF/NVQ3 – 2 or more higher or advanced higher national qualifications (Scotland) or equivalent.
 - RQF/NVQ4 – HND, Degree and Higher Degree level qualifications or equivalent.

⁹ Source: Office for National Statistics (2024), Labour Market Profile – Highland – Labour Supply (July 2023 – June 2024).

- 4.6.3 According to the Office for National Statistics, in 2023, the Highlands had a lower proportion of people holding RQF / NVQ4+ equivalent qualifications (48.7 %) compared to Scotland as a whole (55.1 %). Similar trends are observed at all qualification levels, where the Highlands have a lower proportion of the population holding the respective qualifications when compared to Scotland. Furthermore, the proportion of people within the Highlands who have no qualifications is approximately 0.5 % lower than Scotland.

Table 4.7: Level of Qualifications achieved¹⁰

Qualifications	the Highlands (%)	Scotland (%)
No qualifications	8.7	8.2
Other qualifications	n/a	3.9
RQF/NVQ 1+	85.8	87.9
RQF/NVQ 2+	84.7	87.1
RQF/NVQ 3+	70.9	73.7
RQF/NVQ 4+	48.7	55.1

4.7 Summary of Existing Baseline

- 4.7.1 The Highlands has a higher proportion of residents aged over 65 compared to the Scotland (**Table 4.1**). This trend is expected to remain unchanged, as shown in **Population trends** (as shown in **Table 4.2**) project that the Highlands population will decline. As estimated by the Office for National Statistics, between 2018 – 2043 the population of the Highlands is projected to reduce by around 1 %, from 235,540 to 233,250 (National Records of Scotland, 2020). This trend contrasts those observed at the national level, where the Scottish population is expected to increase by approximately 2.5 % (National Records of Scotland, 2020).
- 4.7.2 The proportion of the Highlands's residents projected to be characterised as of 'working age' is expected to increase. By 2043, it is expected that approximately 59 % of the Highlands's population will be of working age, compared to approximately 63 % across the whole of Scotland.
- 4.7.3 The proportion of residents aged 65 years and over is expected to increase by 2043 to approximately 27.8 % of the total population in the Highlands from a current figure of 22.7 %, whilst the proportion of the Scottish population is expected to reach 22.8 % from a current figure of 19 %.
- 4.7.4 Table 4.2, with population projection for 2043 estimating that whilst both the Highlands and Scotland's populations are expecting to become older, the proportion of residents aged 65 and older in the Highlands will continue to be greater than that of the Scottish population as a whole. Finally, based on current population projections, it's estimated that the working

¹⁰ Source: Office for National Statistics (2024), Labour Market Profile – Highland – Qualifications (January 2023 – December 2023).

population will account for approximately 59 % of the Highlands population, compared to 63 % across Scotland by 2043.

- 4.7.5 When examining economic activity, the Highlands has a larger proportion of residents economically active. However, as illustrated by **Table 4.6** the economy is a similar wage economy when compared to the national average. This is compounded when comparing employment by occupational group (see **Table 4.6**) where a lower proportion of individuals are classified as working in professional occupations, or associate professional & technical roles, which are relevant groups for the construction and operation of the Proposed Development. Nevertheless, within the Highlands there is shown to be a higher proportion of people employed in skilled trades and process plant and machine operative occupations compared to Scotland, which are important groups for the onshore wind sector.
- 4.7.6 Furthermore, whilst both the Highlands and Scotland's working population are concentrated in human health and social work activities; wholesale and retail trade; and accommodation and food service activities, the Highlands are more reliant on these industries, with approximately 45 % of the working population employed in this sector compared to 38 % in Scotland (see **Table 4.3**). The onshore wind sector offers employment opportunities across a variety of other industries and could therefore be an important sector helping to increase the diversity of the Highland economy.
- 4.7.7 Overall, the trends summarised here demonstrate that whilst employment rates are greater in the Highlands compared to Scotland as a whole, employment opportunities tend to be in a less diverse group of industries. The lack of high-value jobs and diversity in employment opportunities is also expected to lead to a reduction in the working age population of the Highlands, and this could be due to the challenges for working-age residents of the Highlands to remain in the area and find skilled employment locally. The expansion of the onshore wind sector offers a potential avenue to improve opportunities for the individuals currently within roles important for the industry, whilst helping to diversify the regional economic base and encourage young people to remain in the area. The creation of high-skilled, well-paying jobs in this sector could help mitigate depopulation trends by supporting a more varied employment landscape.

5 PREDICTED IMPACTS

5.1 Construction Phase

Total CAPEX

- 5.1.1 The Proposed Development consists of up to eight turbines, with a generating capacity approximately 50 MW.
- 5.1.2 The CAPEX for the construction of the Proposed Development per MW has been estimated using multiplier factors developed by industry reports regarding the cost per MW for each technology. The construction and development costs for turbines is estimated at £1,496,091 per MW based on the construction and development costs outlined by BiGGAR Economics on behalf of RenewableUK (2015).
- 5.1.3 Based on the generating capacity of the Proposed Development the total CAPEX for the Proposed Development is estimated to be approximately £73.46 million. The total CAPEX is split between various contract categories, as shown in **Table 5.1**.

Table 5.1: Construction spend by contract type¹¹

Contract Type	Percentage of contract (%)	Total (£ million)
Development and Planning	4.4	3.23
Turbines	70.0	51.42
Civil Works	20.5	15.06
Electricity Works	5.1	3.75
Total	100	73.46

CAPEX for each study area

- 5.1.4 The economic impact of the construction phase was estimated for the Highlands and Scotland. To do this, it was necessary to estimate the proportion of each contract type which might be secured in each study area. The assumptions used were based on the average from RenewableUK (2015) and BVG Associates (2017), and RSK's previous experience undertaking socio-economic analyses, particularly those in the Highlands. The splits for each contract type and the CAPEX this would generate for the economy are shown in **Table 5.2**. It is estimated that the Proposed Development would provide contracts to the Scottish economy worth approximately £30.3 million, with £9.5 million of this being available in the Highlands.

¹¹ RenewableUK (2015), Onshore Wind: Economic Impacts 2015.

Table 5.2: Development and construction expenditure for the Highlands and Scotland¹²

Contract Type	The Highlands		Scotland	
	Percentage (%)	CAPEX (£ million)	Percentage (%)	CAPEX (£ million)
Development and Planning	13.0	0.4	59	1.9
Turbines	12.0	6.2	36	18.5
Civil Works	12.0	1.8	36	5.4
Electricity Works	12.0	0.5	36	1.4
Total		8.9		27.2

Gross GVA and employment

- 5.1.5 Having estimated the size of contracts which could benefit the Highlands and Scotland, the GVA and short-term employment that these contracts could support was calculated. Each contract was assigned to an industrial sector, based on its Standard Industry Classification Code (2022), and relevant local and national turnover per employee, and GVA / turnover ratios were calculated using the Scottish Annual Business Statistics datasets (2024b). These ratios are summarised in **Table 5.3**.

Table 5.3: GVA / turnover ratio and turnover per employee (construction phase)

Contract type	Turnover per employee (£)		GVA / Turnover Ratio	
	The Highlands	Scotland	The Highlands	Scotland
Development and planning	85,639	144,032	0.68	0.55
Turbines	126,545	165,256	0.48	0.38
Civil works	150,513	175,417	0.38	0.39
Electricity works	150,513	175,417	0.38	0.39
Average	128,302	165,030	0.48	0.43

Gross GVA

- 5.1.6 As shown in **Table 5.4**, it is estimated that the construction and development contracts associated with the Proposed Development could generate approximately £10.71 million GVA across Scotland, with £4.11 million GVA directly within in the Highland economy.

Table 5.4: Gross GVA per contract type

Contract Type	the Highlands (£ million)	Scotland (£ million)
Development and Planning	0.29	1.05

¹² RenewableUK (2015), Onshore Wind: Economic Impacts 2015.

Turbines	2.96	7.03
Civil Works	0.69	2.11
Electricity Works	0.17	0.52
Total	4.11	10.71

Employment

- 5.1.7 The number of direct jobs supported by spending on contracts for the Proposed Development was calculated by dividing the CAPEX by the turnover per job ratio for the relevant sector. In this way, as shown in **Table 5.4**, it was estimated that during construction phase, the Proposed Development could generate approximately 179.4 job years for Scotland, with approximately 68.7 job years being directly created in the Highlands.

Table 5.5: Gross job years per contract type

Contract type	The Highlands (years)	Scotland (years)
Development and Planning	4.9	15.2
Turbines	48.8	123.4
Civil Works	12.0	32.6
Electricity Works	3.0	8.1
Total	68.7	179.4

Net GVA and employment

- 5.1.8 The GVA and job years generated by the Proposed Development represents the gross employment and economic impacts. To understand the potential net impacts, a number of additionality factors, including leakages¹³ and displacement¹⁴, had to be considered. These were outlined in **Table 5.6**. To account for the additionality factors, commuting data was reviewed to determine the proportion of workers likely to be involved in the construction of the Proposed Development based outside of the Highlands and Scotland. Regarding

¹³ Leakage - the proportion of project outcomes that benefit individuals or organisations located beyond the relevant area of impact. This was defined using the Office for National Statistics Census data (2011) to determine the percentage of workers whose workplace was located within the regional and national study areas, and who were residents of each study area.

¹⁴ Displacement defines the estimated economic activity that would be diverted from other businesses within a given study area because of the Proposed Development. For this assessment the displacement values for the regional study areas were set as 5 %, whilst the national displacement value was 15 %. This is assumed to be satisfactory as the values were sourced from previous Wind Farm applications and has been routinely used in socio-economic assessments submitted to the ECU.

displacement, analysis assumed that displacement would be 5% for the regional study area, with higher levels of displacement (15%) assumed at the national level.

Table 5.6: Additionality factors for each study area

Additionality factor	Regional (%)	National (%)
Leakages	4.3	1.1
Displacement	5.0	15.0

- 5.1.9 Whilst leakage and displacement can act to reduce the value of the revised Proposed Development to the economy, expenditure in construction contracts is also expected to generate ‘knock-on’ effects across the economy. It will be associated with further rounds of expenditure along the supply chain and with the spending of the wages and salaries of those involved in the construction. These are referred to as indirect and induced impacts.
- 5.1.10 To estimate the indirect and induced impacts, it is necessary to apply the relevant Type II GVA and employment multipliers (shown in **Table 5.7**) from the Scottish Government Supply, Use and Input-Output Tables (2023e) to the estimated gross GVA and direct employment figures. The definition for each of the multipliers is defined as follows:
- Employment multipliers are expressed as ‘full time equivalent’, are the ratio of direct plus indirect (plus induced if Type II multipliers are used) employment changes to the direct employment change.
 - GVA Multipliers can be used to calculate the change in GVA for the economy as a whole and is defined as the ratio of direct, indirect (plus induced as Type II multipliers are used) GVA changes to the direct GVA.
- 5.1.11 For both multiplier effects, only Type II multipliers were used as these account for the induced effects of the Proposed Development.
- 5.1.12 Since the multipliers refer to sectoral interactions occurring at the level of the Scottish economy, it was necessary to adjust them to reflect the lower multiplier effects felt at the regional and local level. The employment and GVA multipliers were therefore set at 65 % of the Scottish value for the Highlands.

Table 5.7: Type II employment and GVA multipliers

Contract type	the Highlands		Scotland	
	Type II employment multiplier	Type II GVA multiplier	Type II employment multiplier	Type II GVA multiplier
Development and Planning	1.23	1.36	1.45	1.56
Turbines	1.38	1.52	1.75	1.80
Civil Works	1.40	1.59	1.80	1.90
Electricity Works	1.40	1.59	1.80	1.90

Contract type	the Highlands		Scotland	
	Type II employment multiplier	Type II GVA multiplier	Type II employment multiplier	Type II GVA multiplier
Weighted Average	1.35	1.51	1.7	1.79

- 5.1.13 Applying the assumptions in **Table 5.6** and **Table 5.7** to the gross employment and economic impacts, the estimate of the likely net employment and economic impacts generated by the Proposed Development could be calculated.
- 5.1.14 As shown in **Table 5.8**, adding up direct, indirect and induced impacts, it was estimated that the construction of the Proposed Development could generate:
- £5.66 million GVA and 92.2 job years in the Highlands; and
 - £16.6 million GVA and 253.3 job years across Scotland.
- 5.1.15 The estimated figures show that the Proposed Development would contribute to the provision of high-quality local employment opportunities during the anticipated 17 – month construction phase and help maximise the value of local expenditure. This is in line with the requirements of the NPF4 Policy 11(c).

Table 5.8: Estimated net employment and economic impacts of the construction phase

Contract type	the Highlands		Scotland	
	Job years	GVA (£)	Job years	GVA (£)
Development and Planning	5.8	0.35	18.3	1.4
Turbines	65.8	4.08	175.4	11.2
Civil Works	16.6	0.99	47.7	3.2
Electricity Works	4.1	0.24	11.9	0.8
Total	92.2	5.66	253.3	16.6

5.2 Operation Phase

Total OPEX

- 5.2.1 The operation and maintenance impacts were estimated as the impacts which would persist throughout the 35-year operational lifetime of the Proposed Development. When the Proposed Development is operational, a team of personnel would have to provide servicing, maintenance, repairs and other operational support. The long-term assessments of the operations and maintenance impacts have been assessed over the 35-year period.
- 5.2.2 Annual OPEX was estimated based on analysis undertaken in the RenewableUK (2015) report, which stated the weighted average cost for wind turbines was £59,867 per MW per annum, which includes:

- Turbine Maintenance;
- Site Maintenance;
- Operational Management;
- Land Agreements;
- Habitat Management costs;
- Non-domestic rates (business rates);
- Community Benefit; and
- Other.

5.2.3 It is estimated that annual operations and maintenance expenditure associated with the Proposed Development's turbines could be worth up to £2.99 million per annum.

5.2.4 Over the 35-year operational lifetime of the Proposed Development it's estimated that there would be a total OPEX of £104.77 million (inclusive of community benefit funding and non-domestic rates).

OPEX for each study area

5.2.5 In order to estimate the economic impact of the operation and maintenance expenditure for Scotland, it was necessary to estimate the proportion of contracts that could be secured in each of the study areas (see **Table 5.9**). The distribution of these contracts was based on assumptions supported by the proportions reported in the 2015 RenewableUK report, the analysis of the industries presents in each of the study areas, as well as RSK's previous experience across more than 10 projects in the Highlands and Scotland.

5.2.6 It was estimated that Scotland could benefit from a Potential Contract value of £1.74 million per annum, with the Highlands accounting for approximately £1.26 million per annum of this total. As shown in **Table 5.9**, over the course of the Proposed Developments operational lifetime the total contract value would be equivalent to £70 million and £49 million for Scotland and the Highlands respectively.

Table 5.9: Operation and Maintenance expenditure by study area

	the Highlands	Scotland
Potential Percentage of contract (%)	42.0	58.0
Potential Contract value per annum (£ million)	1.26	1.74
Total contract value (£ million)	44.1	60.9

Gross GVA and employment

5.2.7 As with the construction phase, the contract values awarded in each of the study areas represented an increase in turnover across those areas. The economic impact of the increase in turnover on GVA and employment in the operational phase was estimated similarly to

construction phase impacts. The average GVA turnover per unit and GVA turnover per employee ratios for each contract type have been calculated from the Scottish Annual Business Statistics datasets (2024b), and is provided in **Table 5.10**. These averaged ratios could then be used to calculate the gross GVA and job years generated by the operational phase of the Proposed Development.

Table 5.10: Estimated average GVA and turnover per employee (operation and maintenance)

Contract type	Turnover per employee (£)		GVA / Turnover ratio	
	the Highlands	Scotland	the Highlands	Scotland
Operation and maintenance	143,412	183,813	0.53	0.51

Gross GVA

- 5.2.8 As shown in **Table 5.11**, it is estimated that the operations and maintenance contracts associated with the Proposed Development could generate approximately £0.92 million GVA across Scotland, with £0.67 million GVA directly within in the Highland economy each year.

Table 5.11: Gross GVA for the operations and maintenance of the Proposed Development

Contract type	the Highlands (£ million)	Scotland (£ million)
Operations and maintenance	0.67	0.92

Gross employment

- 5.2.9 As shown in **Table 5.12**, it is estimated that the operations and maintenance contracts associated with the Proposed Development could generate approximately 11.4 job years across Scotland, with 8.8 years of direct employment for residents within in the Highland economy each year.

Table 5.12: Direct Job years for the operations and maintenance of the Proposed Development

Contract type	the Highlands (years)	Scotland (years)
Operations and maintenance	8.8	11.4

Net GVA and employment

- 5.2.10 As in the construction phase, net impacts on employment and GVA for operation and maintenance has been calculated using additionality factors. This includes leakages and

displacement (both the same as in the construction phase) and GVA and Type II (indirect and induced) employment multiplier values for the relevant industry sectors published on the Scottish Government's Input-Output tables (as identified in **Table 5.13**) Scottish Government (2023e).

Table 5.13: Type II employment and GVA multipliers

Contract type	the Highlands		Scotland	
	Type II Employment multipliers	Type II GVA Multipliers	Type II Employment multipliers	Type II GVA Multipliers
Turbine maintenance	1.52	1.26	1.80	1.40
Site maintenance	1.52	1.26	1.80	1.40
Operational management	1.26	1.39	1.40	1.60
Land agreements	1.35	1.46	1.30	1.70
Weighted Average	1.40	1.33	1.62	1.50

- 5.2.11 Applying the above assumptions to the gross employment and economic impacts provides an estimate of the likely level of net employment economic impacts (see **Table 5.14**).
- 5.2.12 Adding up the direct indirect and induced impacts using the same multiplier methodology conducted for the construction phase, it was estimated that over the Proposed Development's operation life (35 years), the operation and maintenance of the Proposed Development could generate:
- £28.2 million GVA and 390.1 job years for the Highlands; and
 - £39 million GVA and 540.3 job years for Scotland.

Table 5.14: Estimated net employment and economic impacts of the Proposed Development's operational phase

	the Highlands	Scotland
Per annum		
GVA (£ million)	0.8	1.11
Job Years	11.1	15.4
Operation lifetime (35 years)		
GVA (£ million)	28.2	39
Job Years	390.1	540.3

5.3 Community Benefits

- 5.3.1 The Proposed Development would generate a beneficial effect on the local economy through community benefit payments. Aligned with standard industry practice, the Applicant would provide the equivalent of £5,000 per MW of installed turbine capacity per annum, during the operational lifetime of the Proposed Development.
- 5.3.2 The community benefit payments relate to the total installed capacity of the turbines in the Proposed Development which, if consented, would be approximately 50 MW. As such, the community benefit payments could total approximately £250,000 per annum.
- 5.3.3 In total, over the 35-year operational lifetime of the Proposed Development, the community benefit fund would generate approximately £8.75 million for the local economy. It is of note that the community benefit funds are included within the total OPEX generated by the Proposed Development and summarised within **paragraphs 5.2.1 - 5.2.4**.

5.4 Non-domestic Rates

- 5.4.1 The Proposed Development would be liable for non-domestic rates, the payment of which would contribute directly to public sector finances and infrastructure investments supporting the requirements of the NPF4 Policy 11(c).
- 5.4.2 In 2023, the Scottish Assessors Association published guidance on the valuation of onshore wind developments. The rateable value of the Proposed Development was calculated using the expected income per MW, the expected annual net yield¹⁵, the cost of equipment per MW and the decapitalisation rate. The annual liability of the Proposed Development was then calculated by multiplying the estimated rateable value by the Scottish Higher Property Rate of 52.4 pence (Scottish Assessors Association, 2023). In this way, it has been estimated that the Proposed Development would contribute £527,267 per year in non-domestic rates to the Highlands. Over the project's 35-year operational lifetime, it would contribute £18.45 million.

¹⁵ Calculated using the Renewable Energy Foundations renewable generators database. Values for 12 Wind Farm developments with installed capacities of between 50 - 60 MWs were collated and MWh per annum was averaged to provide an estimate for the Proposed Development. In total the average installed capacity of the developments accounted for was 50 MW.

6 SUMMARY OF SOCIO-ECONOMIC EFFECTS

- 6.1.1 Based on the installed capacity of the Proposed Development, the SES found that the following economic and employment benefits could be generated by the Proposed Development.

Construction Phase

- 6.1.2 As illustrated in **Section 5.1**, during the construction phase it is estimated that the Proposed Development could generate up to £16.6 million GVA and 253.3 job years across Scotland, with approximately £5.66 million and 92.2 job years' worth of this total directly benefitting the Highlands.

Operational Phase

- 6.1.3 Over the course of the operational phase of the Proposed Development, as illustrated in **Section 5.2**, it is estimated that over the Proposed Development's 35-year operational lifetime, the operations and maintenance costs could generate up to £39 million GVA and 540.3 job years across Scotland, with approximately £28.2 million and 390.1 job years' worth of this total directly benefitting the Highland economy.

6.2 Community Benefits

- 6.2.1 Whilst accounted for in the OPEX for the Proposed Development, summarised in **Table 5.9**, a breakdown of the community benefit fund generated over the 35-year lifespan of the Proposed Development was calculated in **Section 5.3**. Overall, the Proposed Development would provide approximately £250,000 per year to a community benefit fund, equivalent to £8.75 million if the Proposed Development is operational for the full 35-year period.

Non-domestic Rates

Similarly, the OPEX for the Proposed Development, accounts for a general non-domestic rate per MW calculated by BIGGAR Economics on behalf of RenewableUK (2015). However, the specific non-domestic rate payable to THC has been calculated for the Proposed Development. Overall, the Proposed Development would generate approximately £527,267 per year, equivalent to £18.45 million if the Proposed Development is operational for the full 35-year period.

7 MAXIMISING SOCIO-ECONOMIC BENEFITS

- 7.1.1 The socio-economic structure of the Highlands highlights the need for the creation of jobs. This is reflected in the local demographic profile, with an older population and lower labour market outcomes than Scotland. Future demographic pressures are expected to exacerbate these trends, making job creation a priority to retain the existing population and attract more working age people to the area.
- 7.1.2 It is therefore important that the development of the Highlands' renewable energy industry continues as it will have a pivotal role in revitalising local communities by generating sustainable economic growth and promoting community wealth building. Through rapid deployment of the projects needed to deliver Scotland's target of 20 GW installed capacity by 2030 there is the potential for maximising economic benefits for local communities.
- 7.1.3 The Proposed Development would contribute towards the achievement of these national outcomes by investing in renewable energy which can increase productivity in the economy; and by creating jobs in the local area which would contribute to inclusive growth. The Proposed Development also supports sustainability and the transition to Net Zero by increasing the generation of renewable electricity.
- 7.1.4 The expansion of the onshore wind sector in the Highlands could provide an opportunity to diversify the region's economic base and contribute to the retention of young people in the area and is a key topic of numerous national and local policy and planning documents, including NPF4's Policy 25, and the Highlands and Islands Enterprise, 2023-2028 Strategy. Current depopulation trends could be partly offset by high skilled and high paying jobs created by the Proposed Development.
- 7.1.5 The Proposed Development would have a key role providing long-term job opportunities to the Highlands, whilst ensuring that community benefits are reinvested locally. The net-economic benefits as a result of the investment into the construction and operation of the Proposed Development would result in:
- High quality, secure jobs through the demand created; and
 - Supporting local services and contributing to enabling infrastructure through non-domestic rates.
- 7.1.6 While most benefits from wind farms come from the construction and operation of projects, the Proposed Development also provides significant opportunities for maximising local benefits through wider economic benefits. Whether this is realised will depend on the actions of communities, developers and the public sector. The Onshore Wind Sector Deal indicates a willingness on all sides to work together to achieve these benefits. It is considered there are opportunities for the Proposed Development to deliver wider and lasting economic benefits through:
- maximising local supply-chain content;
 - developing future workforce skills; and
 - investment in the local community.

- 7.1.7 The Proposed Development provides opportunities for the involvement of suppliers from the Highlands, and Scotland. The range of activities that suppliers can be involved in include research and development, design, project management, civil engineering, component fabrication and/or manufacture, installation and maintenance. There is expertise in all of these areas in the wider region, although a full wind energy supply chain covering all aspects of wind turbine component manufacture has not yet been developed within the region or indeed within Scotland as a whole.
- 7.1.8 Uncertainties around procurement, development timescales, and detailed project specifications make it impossible to accurately predict the level of local content a project will include before development begins. The Onshore Wind Sector Deal provides a strategic framework, highlighting actions by the Scottish Government to strengthen local supply chains, enhance workforce skills, and promote circular economic principles Scottish Government (2023d). These objectives are integral to the long-term growth of the onshore wind sector and aim to maximize economic benefits at both local and national levels through collaboration between public bodies, developers, training agencies, and businesses. Given these factors, setting a precise threshold for maximised local content is neither feasible nor desirable, as it could unintentionally hinder future opportunities for innovation and growth within the supply chain. Instead, the focus should remain on fostering a flexible and adaptable framework to support continuous improvement and maximisation of economic benefits for local communities and the Scottish economy more widely.
- 7.1.9 During the construction phase, there would be opportunities for those employed by the Applicant to develop skills that would be of benefit to the local economy and local businesses in the longer term. Further, employment generated through the Proposed Development would contribute to diversifying the local economy and help support the retention in the area of the working age population. Support for skills development is a key priority recognised in the national and local policy but can take many forms such as apprenticeships, retraining for those with transferable skills or early engagement with schools. What is important is that any support provided for local skills development reflects the distinct characteristics of the local labour market and has been developed in collaboration with relevant parties.
- 7.1.10 During the procurement process, the Applicant would follow best practice to maximise local content. In 2014, RenewableUK published the “Local Supply Chain in Onshore Wind, Good Practice Guide”. Whilst that report is now more than a decade old, it can still be considered to provide useful good practice advice, including:
- **maximise your local presence and begin early:** start identifying potential suppliers early by being active and visible locally;
 - **partnerships work:** look for partnerships with business groups and local authorities;
 - **the developer’s role is that of an enabler:** use information on potential suppliers to ensure primary contractors maximise local opportunities;
 - **provide the right information, at the right time:** consider adopting an iterative process when communicating with businesses and leave them time to learn and adjust;
 - **communicate technical requirements early:** this would give the opportunity for upskilling or the emergence of consortia to occur; and

- **if you can, demonstrate local content in planning:** where possible include a demonstrable commitment to local content in planning and carry out ex-post auditing.

7.1.11 Furthermore, during the procurement and construction phases, the Applicant would:

- Undertake a purposeful awareness raising programme, such as adverts placed in local newsletter, of career opportunities within the sector, the transferrable nature of the skills developed and that many job categories in this sector would be required for a long time.
- Implement targeted campaign to demonstrate highly skilled jobs for local people, many of which pay well above the average UK salary.
- Build relationships with education and training providers and establishing long-term partnerships to support local labour market development.
- Co-develop solutions and work collaboratively with relevant training/education partners and community bodies to develop bespoke labour market development solutions.
- Encourage local suppliers to participate in the Young Person's Guarantee, a Scottish Government programme that seeks to connect every 16 to 24 years old in Scotland with an opportunity (a job, an apprenticeship, further or higher education, training or volunteering).

7.1.12 While community benefit is not a material planning consideration and therefore, should not be counted towards the maximising of local benefits in the context of NPF4 policy 11 (which is focused on spending and skills as per the focus of the Onshore Wind Sector Deal), there would be local benefits associated with the community benefit proposals in the Proposed Development. In addition, to the direct and indirect economic impact generated throughout the construction and operation investment of the Proposed Development, the Applicant is also committed to paying the equivalent of £5,000/MW of community benefit based on the installed capacity of the wind turbines on Site, which could produce £8.75 million over the lifetime of the project.

7.1.13 The Proposed Development has the potential for maximising local benefits but the most effective way of achieving this is through collaboration between the developer, authorities and host communities. Together these parties should be able to agree a community package that maximises potential benefit and that is fair and achievable.

8 CONCLUSION

- 8.1.1 The SES for the Proposed Development demonstrates that there is potential for the Proposed Development to bring significant economic benefits at local, regional, and national levels. By creating high-quality employment opportunities, both during construction and operation phases, the project addresses demographic and economic challenges in the Highlands, and potentially contributing to the retention of a working-age population in the region. The development aligns with Scotland's renewable energy targets and supports local policies on economic diversification and community wealth building. By contributing to the growth in the renewable energy sector, the project could contribute to the Highlands' long-term economic resilience, creating a positive impact on local supply chains, skills development, and community investment.
- 8.1.2 Additionally, the proposed community benefit fund of £5,000 per MW per annum, totalling approximately £8.75 million over the project's operational life, reinforces the commitment to supporting local communities. This investment, along with the potential for local supply chain engagement and workforce upskilling, demonstrates a clear alignment with the Highlands' socio-economic goals.
- 8.1.3 Overall, the scale of the beneficial community and economic construction and operational effects would be important to the local and national economies, contributing to sustainable economic growth. The Proposed Development meets these requirements and contributes to the rapid deployment of renewable energy technologies to achieve installed capacity targets, considering criteria such as the support of a high local supply chain content, the provision of local employment and skills development opportunities, the contribution to the cost for enabling infrastructure and other interventions, the provision of a community benefit package and the promotion of the continuation of innovative processes to enhance community wealth.

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