Loch Liath Wind Farm

Socio-Economic Statement

For

Statkraft

Final Report

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Executive Summary

Introduction

MKA Economics was appointed by Statkraft to write an **independent socio-economic assessment** of **Loch Liath Wind Farm**. Loch Liath Wind Farm is a proposal for a 13-turbine wind farm development, to the west of the Great Glen and Loch Ness, and with the closest turbine being located approximately 13 kilometres south-west of Drumnadrochit.

The Local Economy

In summary, the socio-economic baseline assessment confirms a **number of trends** for the local and regional economies, some of which **threaten the long term economic sustainability** of Highland and the local area.

It is clear that Highland continues to face a wide range of economic challenges. Although it has experienced increasing population levels in recent times, the Highland population is forecast to **decrease by 1.0% over the period to 2043**, compared to a predicted 2.5% growth nationally. It is also a rapidly ageing population, with significant increases in those aged over 65 years old. It has a **lower proportion of working age residents**, and this threatens the future economic prospects of the area.

Highland was one of only six local authorities to witness **worsening deprivation levels**, and this continues to be a worrying trend for the Highlands. There are wards in Inverness which are in among the most deprived 5% in Scotland.

However, on the positive side, **unemployment at the regional level and local level has recovered well** from the pandemic induced economic slowdown and unemployment rates are below the Scottish and GB levels.

The local and regional areas are **dependent on the tourism economy** and recreational activities and assets, and although this is a valuable employer, the economic value and wages in this sector are lower than other sectors and more seasonal in nature. **New investment in key economic sectors,** such as renewables, can help reposition the local economy which continues to be adversely affected by a reliance on a narrow range of seasonal sectors.

It is also acknowledged that although the tourism sector is important, it tends to be **seasonal and is also a low wage and a low value sector**. An over dependence on a low wage and highly seasonal economic sector limits the opportunity for future economic growth.

Policy Fit

There are a number of key policies which bear particular relation to the Loch Liath Wind Farm. In terms of the environment. The Scottish Government policies on climate change are beneficial in making the case for the Loch Liath Wind Farm, as it will aid in expanding Scotland's renewable energy capacity and generation, and contribute towards a net zero economy by 2045, whilst helping to offset emissions from carbon-intensive energy generation technologies such as fossil fuels.

Loch Liath Wind Farm will also contribute towards the aims of the new **National Strategy for Economic Transformation** (NSET), fostering community investment and innovation in renewable technology, including wind and battery storage, and doing so in a manner which support Community Wealth Building principles, and guidance around community benefits.

Importantly, it will be developed in line with **National Planning Framework 4** (NPF4), which sets out strong in-principle support for renewable energy proposals with one of the factors to be considered in assessing schemes being the extent to which proposals maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities (Policy 11c NPF 4).

Loch Liath Wind Farm seeks to support a community wealth building ethos, and this is already underway in developing a Memorandum of Understanding regarding community benefit and investigating community ownership with the local development trust (Soirbheas) which represents the host community council.

Socio-Economic Impact and Net Economic Benefit

Loch Liath Wind Farm will deliver a wide range of socio-economic and wider benefits and, in this way, maximises net economic benefits for the local community. This is consistent with NPF4. NPF4 establishes as a requirement for renewable energy proposals that:

> *'they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business, and supply chain opportunities.'*

It is estimated that the following benefits will arise as a result of Loch Liath Wind Farm:

- **Pre-development investment** and planning fees, benefitting a range of Scottish-based companies and organisations;
- **55 construction related PYEs**, translating to a **GVA effect of £4.52** million and a **salary effect of £2.11 million** as a direct result of employment onsite during the 18 month construction of Loch Liath Wind Farm.
- The potential creation of **three FTEs**, £105k in GVA terms and £53.8k in salary terms from the operation of the Proposed Development. Over the 35 year lifetime of the Loch Liath Wind Farm this equates to a **GVA effect of £3.7 million** and a salary effect of **£1.9 million.**

In addition, Statkraft has committed to:

- Furthering their joint working and funding relationship with **University of the Highlands** and Islands, by developing **new scholarships** (STEM and construction skills) dedicated to Loch Liath. This will follow the existing model of scholarships established by Statkraft, with a student receiving funding for their entire period of study. These scholarships will generate further economic and employability benefits to the area.
- The Applicant is committed to investigating opportunities for **Shared Ownership of Loch Liath Wind Farm** for communities surrounding the development.
- **Community Benefit Funding of £429,000 per annum**[1] and around £15.0 million (2024 prices) over the proposed 35-year operational life, and working with Soirbheas to ensure the effective and efficient distribution of community funding.
- **Upgrading a local footpath** the upper sections of the Meall Fuar-mhonaidh.
- Working with Highlands and Island Enterprise (HIE) and the private sector provider to maximise the provision of **superfast broadband** in the region and the economic benefits from broadband. Statkraft completed an initial study into broadband to assess opportunities to enhance broadband coverage locally. This study was updated in 2023 following engagement with the local community council, including their input in to the study scope.
- Statkraft is also committed to a series of **'meet the buyer'** events post planning and prior to construction with a view to putting in place a programme which recognises the benefit of using local contractors.

[1] Based on 13 turbines with a rated power of 6.6MW per turbine

The benefits associated with Loch Liath Wind Farm will go beyond supporting economic activity and employment during the construction and operational phases. In particular, community benefits through ongoing strategic links with UHI, community shared ownership and a substantial annual community benefit funding arrangement, it will provide a stream of income for the local community to be reinvested and deliver against its priorities and ambitions.

On this basis, it can be concluded that Loch Liath Wind Farm maximises net economic impact.

1 Introduction

Introduction

1.1 MKA Economics was appointed by Statkraft to write an independent socio-economic assessment of the proposed Loch Liath Wind Farm. Loch Liath Wind Farm is a proposal for a 13-turbine wind farm development, to the west of the Great Glen and Loch Ness, and with the closest turbine being located approximately 13 kilometres south-west of Drumnadrochit. The wind farm will consist of turbines at a combination of 180m and 200m tip heights. If consented, the project will generate 85.8 MW, enough energy to power 78,000 Scottish households every year.

1.2 This socio-economic statement considers the potential socio-economic benefits that could accrue from the proposal through the construction and operational phases.

Approach

1.3 This report presents the findings from the socio-economic assessment of Loch Liath Wind Farm, the objectives of which are to:

- present an understanding of the local economy through the completion of a socio-economic audit;
- outline the strategic fit and alignment with socio-economic and renewable energy policies and priorities;
- estimate impacts for employment, income and Gross Value Added (GVA) through the construction and operational phases;
- provide narrative commentary on any key wider socio-economic impacts; and
- independently demonstrate and verify the net economic benefits in line with relevant spatial policies, nationally including the NPF4 Policy 11 (Energy) has a focus on benefit maximisation. At the regional level this includes the Highland Council's Community Wealth Building Strategy and their Social Value Charter for Renewables Investment.

2 The Local Economy

Introduction

2.1 This socio-economic baseline assessment outlines the socio-economic characteristics of Highland, and where statistics are available the Aird and Loch Ness Ward (where the site is located) are reviewed. This draws on a range of statistics which are drawn from various datasources, notably the latest Office of National Statistics (ONS) releases which are presented on Nomsweb[2].

The Local Economy

2.2 The headline socio-economic baseline findings are presented below. This is based on a review of the latest datasets from the Office of National Statistics (ONS). The summary findings include:

- The population of Highland in mid-2021 was 238,060, the 7th largest of 32 Council areas in Scotland;
- Between 2001 and 2021 the Highland population increased by 13.9%, compared to a Scotland-wide increase of 8.2%;
- People aged 65 to 74 years in Highland increased by 57.3% in the 20 years between 2001 and 2021;
- People aged 75+ in Highland increased by 60.6% in the 20 years between 2001 and 2021;
- The Highland population is forecast to decrease by 1.0% over the period to 2043, compared to a predicted 2.5% growth nationally;
- Highland is expected to see a 78.3% increase in the number of people aged over 75 years in the period to 2043, compared to 70.6% nationally;
- 60.6% of the regional population is of working age, compared to 63.5% and 62.9% at the Scottish and Great Britain (GB) levels respectively;
- The region has a higher proportion of people who 'want a job' (27.4%) compared to the Scottish (16.5%) and the GB (17.3%) levels;
- Unemployment (August 2024) in Highland is lower (2.3%) than both the Scottish (3.4%) and the GB (4.3%) levels;

[2] https://www.nomisweb.co.uk/

- Wages are lower in Highland, with a gross weekly pay of £664, compared to £703 at the Scottish level and £683 at the GB level;

- The region has a higher proportion of skilled trade; caring, leisure and service; process plant and machine operatives; and elementary occupations than the Scottish and GB levels;

- Regionally there are fewer people employed in professional, associate professional, technical, sales and customer service occupations than the national level;

- Highland was one of only six local authorises to witness a worsening deprivation levels, and this continues to be a worrying trend for the Highlands. There are wards in Inverness which are in among the most deprived 5% in Scotland; and

- Claimant count unemployment rate of the Aird and Loch Ness Ward was 1.8% in August 2024, this is lower than the regional and Scottish levels.

Tourism

2.3 An overview of the Highland tourism economy, drawn from the Scottish Government's Growth Sector Database[3], is summarised below:

- Sustainable tourism (which is one of the six growth sectors defined in the Scottish Government's Growth Sector Database) employed 18,000 people across the Highlands in 2022 and the sector generated £278 million in GVA in 2021. These figures are likely to have been adversely affected by the Covid-19 pandemic, with GVA still around 10% below that reported in 2019. The statistics for 2022 and 2023 are not available, however, it has been reported by third party sources that tourism continues to recover from the Covid-19 pandemic;

- GVA generated by sustainable tourism in the Highlands was approximately 8.3% of the value added by the sustainable tourism sector in Scotland (£3.4 billion) and employment was 7.9% of total employment in the sustainable tourism sector (229,000). The tourism sector is relatively more important in Highland than on average in Scotland and the GVA per head is also higher at the Highland level (£18,558) compared to the Scottish level (£16,165);

- The tourism sector is an important employer in Highland as a whole. All of the largest tourist attractions, as reported by VisitScotland[4], in the Highlands are more than 100 miles from the Proposed Development. This includes Urquhart Castle and Loch Ness by

[3] Growth Sector Database, Scottish Government, 2024

[4] Tourism in the Highlands, VisitScotland, 2019

Jacobite, which are the most popular attraction in the Highlands, both located on Loch Ness;

- Loch Ness itself is a significant tourist attraction in the area and at its closest point, is approximately 8km from the closest turbine of the Proposed Development. The nearest settlement is Invermoriston which is approximately 7km to the south of the closest turbine, close to the shores of Loch Ness; and

- The most visited attractions in Highland according to VisitScotland are Urquhart Castle, Glenfinnan Monument, Glencoe Visitor Centre, Glenmore Forest Park and Loch Ness by Jacobite (which operates out of various sites in Loch Ness, including the Clansman Harbour). With the exception of Urquhart Castle and the Clansman Harbour, each of the attractions is more than 15km away and therefore outside the 15km study area for the assessment of potential effects on tourism, with three being over 50km away. Urquhart Castle and Loch Ness by Jacobite are both on Loch Ness.

2.4 The other most visited attractions in the region which are located within the 15km study area but for which detailed information on visitor numbers is not available, are noted below. These include:

- A number of attractions at Fort Augustus, approximately 13km from the closest turbines (including the Caledonian Canal Centre and Loch Chambers, Cruise Loch Ness at Fort Augustus (start point for cruises approximately 13km from closest turbines, with tours cruising the loch), and the Clansman Centre;

- Glen Affric, 10-15km from closest turbines (see further detail below); and

- Nessieland and the Loch Ness Centre & Exhibition, just outside Drumnadrochit, approximately 13km from closest turbines.

2.5 Facilities in the area closest to the Loch Liath Wind Farm are found in Invermoriston, Foyers, Drumnadrochit and Fort Augustus and include a selection of local shops and cafés, adventure activities such as kayaking and canoeing, visitor attractions including loch cruises and several B&Bs, hotels and self-catering accommodation providers.

2.6 The North Coast 500 (NC500) is a 516-mile scenic route around the north coast of Scotland, starting and ending at Inverness Castle. It is not a single road, but a series of existing roads that form a loop around the northern Highlands. The route was launched in 2015 and links many features in the north Highlands of Scotland in one touring route has driven an increase in visitor numbers in recent years. NC500 is an important driver of tourism in the local area, increasing its profile across Scotland, the UK and internationally. The stretch of the route is not in close proximity to the Loch Liath Wind Farm or Loch Ness, the closest location is the access and egress from Inverness Castle, where the NC500 begin and ends.

2.7 The main tourism facilities within the area are located within the population centres around Loch Ness and are primarily self-catered cottages and lodges. These include:

- Invermoriston - the village of Invermoriston is located approximately 7km to the south of the closest turbine of the Proposed Development. VisitScotland lists 13 accommodation providers in the village, primarily self-catering facilities and a B&B;

- Foyers - on the opposite side of Loch Ness, approximately 10km from the closest turbine of the Loch Liath Wind Farm is the village of Foyers which VisitScotland lists as hosting six accommodation providers;

- Drumnadrochit - the village is approximately 13km to the east of the closest turbine of the Proposed Development. Drumnadrochit is very popular for accessing loch ness and the story of the Loch Ness Monster, with a well-known visitor centre as noted above. VisitScotland lists almost 60 accommodation providers in Drumnadrochit including five hotels, two campsites, two hostels and several self-catering properties; and

- Fort Augustus - the village of Fort Augustus is located approximately 13km to the south-west of the closest turbine of the Loch Liath Wind Farm and serves as a base for visitors exploring the Great Glen. VisitScotland lists 70 accommodation providers in Fort Augustus including four hotels, two campsite / hostel facilities and several B&Bs and self-catering facilities.

2.8 In addition to the accommodation providers within these settlements, there are some accommodation providers in rural locations within 15km of the Proposed Development.

2.9 The tourism sector in the Great Glen and wider Highland area is an important employer and visitors come from all over the world to see Loch Ness and other attractions. The key attractions in the area are mainly outdoor activities and tourism activity is predominantly seasonal in character. The tourism sector near the Loch Liath Wind Farm is similarly seasonal with many of the hotels closed over the winter months. Further details on recreational activities which are a key draw for tourist, are detailed below.

Recreation

2.10 It should also be noted that a number of the visitor attractions noted above are also considered relevant to recreation, for example Glen Affric, which is a National Nature Reserve (NNR)) and National Scenic Area (NSA). Glen Affric is popular with visitors and with walkers, providing the opportunity to visit a diverse range of habitats including woodlands, lochs, moorlands, ancient pinewoods (including one of the largest ancient Caledonian pine woods in Scotland). A diverse range of species of animal can also be found in Glen Affric, including osprey, black-throated diver, otter and red deer. There are a number of facilities for visitors within Glen Affric, including car parks with picnic tables and a number of waymarked paths.

2.11 The Great Glen Way is a long-distance path, promoted as one of Scotland's Great Trails, and connects the west and east coast of Scotland passing through the Highlands. The walking path follows the western shore of Loch Ness approximately 5km east of the nearest turbine. The South Loch Ness Trail passes from Fort Augustus to Inverness, broadly following the eastern shore of Loch Ness approximately 10km east of the nearest turbine. The Great Glen Way and South Loch Ness trail form the Loch Ness 360° Trail, a promoted circular route that circumnavigates Loch Ness.

2.12 The Affric Kintail Way passes approximately 70km between Drumnadrochit and Morvich, passing west from the Great Glen Way through Glen Urquhart before passing on a north-east to south-west alignments through Glen Affric. The route formerly followed the A831 through Glen Urquhart, however in 2019 changes to the route were granted planning permission, with plans to implement realignment of the route in phases. The route will be realigned to follow the lower slopes of the glen, where it will pass through forestry to the north-east of Buntait before crossing the A831 near Millness towards forestry at Kerrow Wood. The route passes through Glen Urquhart 3.6km north of the nearest turbine.

2.13 The Caledonia Way cycle route runs from Campbeltown to Inverness, and passes to the east of Loch Ness approximately 9.8km east of the nearest turbine.

2.14 There are a number of other Core Paths and Rights of Way in the vicinity of the Site, there is varying degrees of visibility from these lesser known routes, and none cross-cut the Proposed Development. A short section of HI71 overlaps with the access to the Proposed Development, however this is already used to access the operational Bhlaraidh Wind Farm, and will also be used for construction and operation of the consented Bhlaraidh Wind Farm Extension.

2.15 The Great Glen Canoe Trail is a water-based route connecting Fort William to Inverness via the Caledonian Canal, Loch Lochy, Loch Oich and Loch Ness. The route is considered one of Scotland's Great Trails and passes approximately 7km to the east of the nearest turbine on a south-west to north-east alignment through Loch Ness and is estimated to have approximately 4,000 users per annum. A number of boat cruises and tours also bring recreational receptors and visitors to the waters of Loch Ness.

2.16 In addition to the marketed routes, trails and water based routes there are other core paths and Rights of Way, notably including HI71 which overlaps for a short section with the existing Bhlaraidh Wind Farm access which will be used to access the Loch Liath Wind Farm during construction and operation. HI52, HI53, HI67, HI70 are also within 5km of the Proposed Development.

2.17 Another notable path is the Meall Fuar-mhonaidh path, of which the upper section is proposed to be upgraded by the Applicant as part of proposed enhancement measures

associated with the Proposed Development. Meall Fuar-mhonaidh is a popular local hill, the view from which formed a key component of the design of the Proposed Development.

2.18 Each of these routes is presented in Figure 13.1 of the Environmental Impact Assessment (2023 EIA Report), and summarised in Table 2.1.

Table 2.1: Recreational Routes within 15km of the Proposed Development

Recreational Route	Approximate Nearest Distance to the Turbines (km)	Description
HI52, HI53, HI67, HI70 and HI71	2km	Selection of core paths
Affric Kintail Way	5km	Cannich to Altbeith (Section 2 and Section 3)
Loch Ness 360° Trail	5km	Invermoriston Section
Great Glen Way	5km	Includes the Loch Ness 360° Trail and the South Loch Ness Trail
Meall Fuar-mhonaidh	7km (approximate distance to summit)	Path to summit
Great Glen Canoe Trail	7.5km	Water based route on Loch Ness
South Loch Ness Trail	10km	South side of Loch Ness
The Caledonian Way	10km	SUSTRANS route of south of Loch Ness
Trail of Seven Lochs	10km	South side of Loch Ness

Summary

2.19 In summary, the socio-economic baseline assessment confirms a number of trends for the local and regional economies, some of which threaten the long term economic sustainability of Highland and the local area.

2.20 It is clear from the overview presented in this section that Highland continues to face a wide range of economic challenges. Although it has experienced increasing population levels in recent times, the Highland population is forecast to decrease by 1.0% over the period to 2043, compared to a predicted 2.5% growth nationally. It is also a rapidly ageing population, with significant increases in those aged over 65 years old. It has a lower proportion of working age residents, and this threatens the future economic prospects of the area.

2.21 Highland was one of only six local authorities to witness worsening deprivation levels, and this continues to be a worrying trend for the Highlands. There are wards in Inverness which are in among the most deprived 5% in Scotland.

2.22 However, on the positive side, unemployment at the regional level and local level has recovered well from the pandemic induced economic slowdown and unemployment rates are below the Scottish and GB levels.

2.23 The local and regional areas are dependent on the tourism economy and recreational activities and assets, and although this is a valuable employer, the economic value and wages in this sector are lower than other sectors and more seasonal in nature. New investment in key economic sectors, such as renewables, can help reposition the local economy which continues to be adversely affected by a reliance on a narrow range of seasonal sectors.

3 Socio-Economic Policy Fit

Introduction

3.1 This section presents the economic and market rationale for developing the Loch Liath Wind Farm and setting the policy agenda in which it supports and contributes towards.

Socio-economic Rationale

3.2 The decarbonisation of Scotland's electricity sector has been driven by rich natural resources, a supportive approach to planning, a drive to involve local communities in decisions that affect them, supportive market frameworks, and rapidly declining prices of renewable technology globally - with wind and solar now the lowest cost forms of new generation[5].

National Economic Policy

3.3 The Scottish Government replaced the Scottish Economic Strategy (SES) with the NSET[6] in 2022. This is the Scottish Government's statement of ambition for economic recovery following the Covid-19 pandemic.

3.4 It sets the ambition of the next ten years as a time of huge change and 'extraordinary opportunity' and promotes Scotland as a nation with competitive advantages in the new industries generated by technological change.

3.5 NSET deliberately focuses on five policy programmes with the greatest potential benefit, including to *'strengthen Scotland's position in new markets and industries, generating new, well-paid jobs from a just transition to net zero.'*

3.6 The transition to net zero is seen not just as an environmental imperative but an economic opportunity - one where Scotland will become world leading. The identified opportunities for this competitive advantage include the construction and development of renewable energy.

3.7 The just transition to a net zero economy is a key aspect of Scottish Government climate policy. The Climate Change (Emissions Reduction Targets) (Scotland) 2019 Act embeds the principles of a just transition, which involves reducing emissions in a way which tackles inequality and promotes fair work. The Just Transition Commission is currently working to prepare advice for Scottish Ministers on how to maximise the economic opportunities involved in tackling climate change, whilst minimising the risks.

[5] Electricity Generation Costs, Department for Business, Energy and Industrial Strategy, 2020

[6] National Strategy for Economic Transformation, Scottish Government, 2022

3.8 The overarching strategy for all policies involved in tackling climate change is the Climate Change Plan 2018 - 2032[7] which brings together more than 100 new policies and proposals to support Scotland's green recovery and ensure a just transition to net zero that will:

- support environmentally and socially sustainable jobs;
- support low-carbon investment and infrastructure;
- develop and maintain social consensus through engagement with workers, trade unions, communities, non-governmental organisations, representatives of the interests of business and industry;
- create decent, fair and high-value work in a way which does not negatively affect the current workforce and overall economy; and
- contribute to resource efficient and sustainable economic approaches which help to address inequality and poverty.

3.9 Focusing on a green recovery is the Scottish Government's commitment to transition to net zero emissions in a way that is just, and that delivers a thriving, sustainable economy that works for all of Scotland.

3.10 NPF4[8] sets out clear in principle support for the development of new renewable energy technologies, with the Intent of the overarching energy policy (Policy 11) being:

'To encourage, promote and facilitate all forms of renewable energy development onshore and offshore. This includes energy generation, storage, new and replacement transmission and distribution infrastructure and emerging low-carbon and zero emissions technologies.'

3.11 Importantly for this socio-economic assessment Policy 11 (C) 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.'

3.12 NPF4 has a regional focus including the 'North and West Coast and Islands' area, where the Proposed Development is located. Like other regional areas of Scotland NPF4 discusses key aims and objectives for the 'North and West Coast and Islands' Area under three

[7] Update to the Climate Change Plan 2018 – 2032, Scottish Government, 2021

[8] National Planning Framework 4, Scottish Government, 2024

key themes which are 'sustainable places', 'liveable places' and 'productive places'. For 'North and West Coast' these themes have the following priorities:

> *'To deliver **sustainable places**, Regional Spatial Strategies and Local Development Plans should maximise the benefits of renewable energy whilst enhancing blue and green infrastructure, decarbonising transport and building resilient connections.'*

> *'To deliver **liveable places**, Regional Spatial Strategies and Local Development Plans in this area should support coastal and island communities to become carbon neutral, thus contributing to net-zero commitments and reducing fuel poverty.'*

> *To deliver **productive places**, Regional Spatial Strategies and Local Development Plans in this area should seize the opportunities to grow the blue and green economy, recognising the world-class environmental assets that require careful management and the opportunities to develop skills and diversify employment.'*

3.13 NPF4 is clear in its desire to rebalance the 'North and West Coast and Islands' economy to enable it to make a strong contribution towards meeting the country's ambition for a net zero and nature positive country by demonstrating how natural assets can be managed and used to secure a more sustainable future.

3.14 Importantly for the North and West Coast NPF4 promotes a planned approach that can help to target future development in areas of significant economic disadvantage so that new and better jobs are more fairly distributed to help address national, regional and more localised inequality.

3.15 NPF4 mirrors the aim of NSET to focus on green growth to foster economic wellbeing and prosperity and this assessment directly focuses on this aspect and presents an independent assessment of the economic development role which the Loch Liath Wind Farm will bring to the area.

3.16 NPF4 is founded on sustainable economic growth principles and is related to the NSET which confirms that the planning system should proactively support development that contributes to sustainable economic growth and to create sustainable places.

3.17 Loch Liath Wind Farm directly supports this vision through new investment and employment in renewable energy generation which supports the vision of moving Scotland's economy towards net zero.

Regional Economic Policy

3.18 The assessment also sets out how the Loch Liath Wind Farm aligns with the principles of The Highland Council's (THC) Community Wealth Building Strategy 2024 - 2027[9] and their Social Values Charter for Renewables Investment[10].

3.19 The Community Wealth Building Strategy sets out a three year vision for taking forward and embedding a THC approach to Community Wealth Building in all aspects of the Council's activities and investments. The vision is to:

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

3.20 Communities across the Highlands face a range of social, economic and environmental challenges. These will not be solved by traditional approaches to economic development which are based on the presumption that as the economy grows, wealth is generated for all. Community Wealth Building provides an alternative approach and a practical response that aims to keep wealth within a local area. It is often described as a people centred approach to economic development and aims to ensure every area and community can participate in, and benefit from, economic activity.

3.21 The more recent Social Values Charter for Renewables Investment sets out the community benefit expectations Highland has for companies wishing to invest in renewables in the Highlands. This Charter is designed to set out what the area expects from renewables investment alongside what the public / private / community sector partners will do to support and enable this contribution.

3.22 It aims to:

'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. Unlock economic opportunities for the area'

3.23 The Highlands is witnessing unprecedented levels of public and private sector infrastructure investment over the next 20 years combined with numerous energy companies planning to invest in the Highland area.

3.24 In light of this, the Council has agreed to establish a Social Value Charter for Renewables Investment, which sets out the community benefit expectations from developers

[9] Community Wealth Building Strategy 2024 – 2027, The Highland Council, 2024

[10] Social Values Charter for Renewables Investment, The Highland Council, 2024

wishing to invest in renewables in this area and what the Highland partnership – public, private and community – will do to support and enable this contribution.

3.25 The Charter, agreed by Council, aims to 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.

3.26 The Proposed Development has been developed in line with the ethos and principles of the Social Values Charter for Renewables Investment.

Summary

3.27 In summary, there are a number of key policies and strategies which bear particular relation to Loch Liath Wind Farm.

3.28 Loch Liath Wind Farm will make a positive contribution to the delivery of net zero targets and also contribute towards the aims of NPF4 (Energy) and NSET, fostering investment and innovation in renewable technology.

3.29 The central focus of NPF4 and NSET at the national level and the Community Wealth Building Strategy and Social Values Charter at the local level, is community wealth building. All projects seeking planning in local areas should embrace and help facilitate community wealth building. This assessment has been completed to set out how the Loch Liath Wind Farm can help deliver community benefits and embraces community wealth building principles.

4 Socio-Economic Impact Assessment

Introduction

4.1 Loch Liath Wind Farm can benefit the Highland and Scottish economies in a number of different ways. This section sets out an assessment of the socio-economic impacts of the wind farm across a range of key indicators. It also presents an overview of secondary research on tourism behaviours to wind farms.

Socio-economic Overview

4.2 According to a BVG associates report[11] Scotland and the UK capture the majority of the economic value generated by wind farms which are built here. The report suggests that on average, 66% of the total economic value of a wind farm accrues to the UK; 51% of which is in Scotland. Local areas also benefit, with on average, 16.5% of the total value accruing to the local region. Benefits include local employment and service contracts during project operations, direct payments to local economies via land rents, indirect income through business rates and spend on travel, accommodation, and supplies, as well as community benefit packages.

4.3 A study in 2009[12] showed that a significant number of jobs were created in the wind energy sector with a positive relationship between the megawatts (MW) installed and number of jobs. Over 10 years' later, a study into the economic impact of Scotland's renewable energy sector published in 2021[13] found that a significant amount of the full time equivalent (FTE) employment in renewables was supported by onshore wind (8,780) and offshore wind (4,700). In 2019, the report calculated that Scotland's renewable sector had a turnover of £2.8 billion and approximately 6,440 FTEs. The report highlights that the direct employment of renewable activities is mostly in the electricity and gas, construction, and manufacturing industries, however, the spill-over impacts extend into many other sectors. It is suggested that renewable activities support over 3,000 FTE employment in the wholesale & retail sector, 1,600 FTE employment in professional, scientific & technical services, and 1,800 FTE employment in the admin & support services sector.

Construction Effects

4.4 As set out in the EIA, an average workforce of 30 people will be employed during the 18-month construction period for the Loch Liath Wind Farm. Although it is standard practice in economic appraisals to convert temporary employment levels into FTEs, as the construction

[11] Economic benefits from onshore wind farms, BVG Associates, 2017

[12] Direct employment in the wind energy sector: An EU study, Blanco, M.I. and Rodrigues, G., 2009

[13] The Economic Impact of Scotland's Renewable Energy Sector, Fraser of Allander Institute for Scottish Renewables, 2021

phase is short term and temporary employment it is assumed that 35 people being employed for 18 months equates to 45.0 Person Years Employment (PYE). The Developer has encouraged local suppliers to register their interest through their website and during exhibitions.

4.5 Once leakage, displacement and multiplier effects have been accounted for, it is estimated that there will be 55.0 PYEs generated by the construction of the Proposed Development.

4.6 In terms of GVA and salary effects of these new jobs, the assessment has drawn on average GVA per head and salaries for the civil engineering sector in THC from the Scottish Annual Business Statistics. This presents an average annual GVA per head effect of £70,953 and an average annual salary effect of £37,134. In relation to 55.0 PYEs this translates to a GVA effect of £4.52 million and a salary effect of £2.11 million as a direct result of employment onsite during the construction of Loch Liath Wind Farm.

4.7 Wherever reasonably practicable, the Applicant is committed to using local contractors, suppliers, and employees during the construction phase of the Proposed Development. The Highlands has an excellent variety of businesses that have extensive experience and skills in wind farm, energy and renewables development. Some of the employment opportunities during the construction phase of the Loch Liath Wind Farm relate to civil engineering, groundworks, electrical works, steel fixing, plant hire, concrete, and aggregates supply.

4.8 Construction workers may choose to reside in local accommodation which will further benefit the local economy through spending in local hotels, B&B's, shops and restaurants. It is worth noting RenewableUK research which estimated that the expenditure of workers who visit the local area benefit the accommodation and food service sector to the value of around £7,500 per MW constructed. The wider 'knock-on' impacts can in turn support the supply chain of other activities such as the spending habits of retail operations and accommodation providers. Based on the 85.8MW Loch Liath Wind Farm this suggests a further £644k in construction related expenditure in the local areas during the construction phase. Statkraft is reviewing options for worker accommodation in its wider project portfolio, with the potential for local economic gains from business opportunities or creation of new housing units which later pass into the general market.

Operation Effects

4.9 Due to their remote operational control and limited need for servicing, wind farms do not create large numbers of jobs during the operational stage. It is expected that about two FTE staff will be employed to operate the Loch Liath Wind Farm and undertake routine maintenance work during its lifetime (35 years).

4.10 The potential annual direct, indirect and induced job creation of 2.96 FTEs, £105k in GVA terms and £53.8k in salary terms from the operation of the Loch Liath Wind Farm over 35

years. Over the 35 year lifetime of the Loch Liath Wind Farm this equates to a GVA effect of £3.7 million and a salary effect of £1.9 million. There is also the potential for employment and local spending to be generated from projects associated with the community benefit payments which is not accounted for.

Tourism and Recreation Impact Assessment

4.11 There have been a number of research exercises completed regarding the opinions of tourists towards wind farms. A summary of the most relevant and highly regarded research is included in this sub-section.

4.12 The Economic Impacts of Wind Farms on Scottish Tourism study by Glasgow Caledonian University[14] is perhaps the most comprehensive on the impacts of wind farms on tourism in Scotland, incorporating:

- A literature review;
- An intercept survey of tourists currently in the studied areas;
- An internet survey;
- A geographical information system (GIS) study about the effect on accommodation; and
- Economic analysis of the results.

4.13 The study covered the areas of Caithness and Sutherland, Perth Kinross and Stirling, Dumfries and Galloway, and the Scottish Borders. The literature review found that:

- Although a significant number of individuals reported a loss of value, some thought that they enhanced the landscape;
- In Denmark, an established wind farm market, turbines are seen as a positive impact on the landscape;
- Hostility to wind farms decreases over time; and
- There is no evidence to suggest negative economic impacts of wind farms on tourists.

4.14 The research presented findings from a number of surveys, it stated that *'The vast majority (93-99%) of tourists that had seen a wind farm in the local area suggested that the*

[14] Economic Impacts of Wind Farms on Scottish Tourism, Glasgow Caledonian University, 2008

experience would not have any effect on their decision to return to that area, or to Scotland as a whole.'

4.15 Overall, the Glasgow Caledonian University Study concluded that; *'…the findings from both primary and secondary research relating to the actual and potential tourism impact of wind farms indicate that there will be neither an overall decline in the number of tourists visiting an area nor any overall financial loss in tourism-related earnings as a result of a wind farm development.'*

4.16 A subsequent report from the Economy, Energy and Tourism Committee[15] presented a number of findings, including the following points in regard to the relationship between renewable energy targets and tourism objectives:

'While some strongly held localised and anecdotal opinion exists, the Committee has seen no empirical evidence which demonstrates that the tourism industry in Scotland will be adversely affected by the wider deployment of renewable energy projects, particularly onshore and offshore wind.'

4.17 The report also found:

'Whilst care always needs to be taken in terms of the planning process and decisions on the siting of individual projects in areas popular with tourists and in our rural and wild land areas, no one has provided the Committee with evidence, as opposed to opinion.'

4.18 A 2012 report commissioned by the Scottish Government[16] subsequently found that the findings of the Glasgow Caledonian University report were robust, and that there had been no adverse effect on tourism in the areas considered in the original report.

4.19 Since the study by Glasgow Caledonian University was produced in 2012, there has been a significant growth in both the installed capacity of onshore wind energy in Scotland and the tourism economy.

4.20 In 2008, there was 1.7 GW of installed wind energy capacity in Scotland, and by 2024 (Q1), this had increased to 9.6 GW at the end of March 2024[17]. If there were to be negative impacts for the tourism sector associated with the development of onshore wind energy, they would have become apparent in this time period; however, this is not the case and tourism volumes and values have increased over this time period.

[15] Report on the Achievability of Scottish Government's Renewable Energy Targets, Scottish Parliament, 2012

[16] The Impact of Wind Farms on Scottish Tourism, Climate Exchange, 2012

[17] Energy Statistics for Scotland Q1, Scottish Government, 2024

4.21 In 2011, VisitScotland commissioned Wind Farm Consumer Research[18] into attitudes of tourists towards wind farms, which surveyed 2,000 people in the UK and 1,000 people in Scotland, who had visited Scotland recently. Although the majority (86-91%) were in agreement about the importance of the natural scenery and landscape, for most of the respondents (80-83%) their decision to stay in the UK for a short holiday would not be affected by the presence of a wind farm. In general, the respondents did not feel that wind farms ruined the tourism experience.

4.22 In 2021, BiGGAR Economics published research into the relationship between the onshore wind and tourism sectors in Scotland[19]. This study was undertaken to find empirical evidence of a relationship between the development of onshore wind farms and the tourism sector in Scotland. Their analysis of 44 wind farm case studies in Scotland found no evidence of a link between wind farm development and trends in tourism employment. The analysis of trends at the local authority area found no relationship between the growth in the number of wind turbines and the level of tourism-related employment.

4.23 There is a raft of more recent public attitude surveys, including the Department for Energy Security and Net Zero's Public Attitudes Tracker[20] reported in July 2024 that 84% of people said they supported the use of renewable energy such as wind power, solar energy and biomass to provide electricity, fuel and heat. This has increased slightly from 82% in winter 2023, but remains below the autumn 2022 peak (88%).

4.24 A new poll completed by the Diffley Partnership, and as reported in The Scotsman[21], in September 2024 has showed an overwhelming backing for onshore wind farms, with more than three-quarters of people surveyed in Scotland supporting more development to hit the country’s net-zero targets.

4.25 The survey showed support in Scotland for onshore wind farms outstripping opposition to them by 77 per cent to just 8 per cent. A further 12 per cent said they neither supported or opposed, and 4 per cent answered don’t know.

4.26 The poll also revealed backing for wind farms in local areas, with 75 per cent of respondents either ‘strongly’ or ‘somewhat’ supportive compared to 8 per cent either ‘strongly’ or ‘somewhat’ against. Thirteen per cent were neither supportive nor opposed, and 3 per cent did not know.

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[18] Wind Farm Consumer Research, VisitScotland, 2011

[19] Onshore Wind and Tourism in Scotland, BiGGAR Economics, 2021

[20] Public Attitudes Tracker, Department for Energy Security and Net Zero, 2024

[21] https://www.scotsman.com/news/environment/poll-onshore-wind-farm-scotland-diffley-partnership-labour-party-conference-renewables-4791466

4.27 MKA Economics worked with Visit Inverness Loch Ness (VILN) in 2022 to ascertain the views of local businesses and stakeholders as to the effects of renewable developments around Loch Ness and their effect of tourism. A summary of the findings is included as Appendix 13.2 to 2023 EIA Report. The online survey of local businesses found that only 10% of respondents noted that they were not supportive of wind farms in the Loch Ness area, this is consistent with VisitScotland's own research of consumers, which stated that 90% of visitors were not dissuaded from visiting or revisiting an area which had sight of a wind farm. Only 19% of respondents felt that visitors may be persuaded from visiting an area due to the presence of a wind farm, this is above the national VisitScotland research, suggesting businesses are slightly more nervous than visitors about the impact of wind farms on local tourist trade.

4.28 MKA Economics consulted with the CEO of VILN as part of the research, as well as VisitScotland, Highland Tourism, THC Tourism and a Highland Tourism Ambassador). In summary, the key stakeholders embraced the opportunities afforded by renewable development and investments and recognised the benefits for tourism and community groups as a result of wind farm and renewable infrastructure in the Loch Ness area.

4.29 VILN now have almost 500 tourism business members, of which 85% are accommodation providers. VILN has received considerable positive feedback about renewables, low carbon, the heritage of hydro power and the important role renewables and tourism play locally. This was consistent with the consultations with the other stakeholders.

4.30 Essentially, it validated the national research which noted no significant adverse effects, in fact it was noted that Urquhart Castle numbers increased from 180k per aannum in 2005 to 520k in 2019, whilst wind farms increased locally. Other statistics show that in Scotland the number of turbines increased from 1,082 in 2009 to 3,772 in 2019, and the installed capacity increased from 1.9GW to 8.0GW - while employment in tourism-related sectors in Scotland also grew by 20% during this decade.

4.31 The green economy, net-zero drive and green tourism can work together to bring a number of benefits to the Highland area.

4.32 Overall, the secondary research completed to date confirms that the tourism sector is not adversely affected by onshore wind farms. In fact, the tourism sector has continued to grow across Scotland as more wind farms have been developed. Older surveys have consistently proven there is not direct link that suggests onshore wind has a detrimental effect on the tourism sector, these surveys have been verified by more recent research which have validated this position further.

4.33 Some of the accommodation providers, and food and drink outlets, will also experience a positive impact from hosting contractors during the construction and ongoing maintenance of the Loch Liath Wind Farm.

Wider Economic Impacts

4.34 In addition to the stated economic opportunities during the construction and operational phases, there are also a variety of wider economic impacts which should be noted as having positive effects on the regional and national economies. These are discussed in the following paragraphs.

4.35 ***Supporting policy objectives;*** Loch Liath Wind Farm can play an important role in supporting regional and national policy objectives. Importantly, the wind farm can support the ambitions set out in the national and regional economic strategies as set out earlier in this report, notably a new and significant capital investment, whilst supporting the area's green credentials, supporting local business through supply chain opportunities and thereby creating jobs and offering skills development. It will also play a role in supporting the drive for high value sector growth, increasing wages and reducing the migration of young people.

4.36 ***Local supply chain opportunities:*** Statkraft will host 'Meet the Buyer' events and suitably qualified local firms will be invited to bid for different aspects of construction, such as foundation laying and electrical works. Construction materials, such as aggregates, will be sourced locally wherever possible and local transport and plant hire companies used wherever possible.

4.37 ***Worker expenditure:*** It is worth noting Renewable UK research which estimated that the expenditure of workers who visit the local area benefit the accommodation and food service sector to the value of around £7,500 per MW constructed. This would suggest, based on an 85.8 MW development, that further financial benefits of £643,500 would accrue at the regional level, largely benefiting local accommodation providers. The wider 'knock-on' impacts can in turn support the supply chain of other activities such as the spending habits of retail operations and accommodation providers.

4.38 ***Pre-construction benefits:*** as the development of the Loch Liath Wind Farm is underway in a planning sense, there have already been financial and economic effects to local and national business that have been commissioned to support the development phase. This work is ongoing and there will continue to be financial benefits to companies involved in helping to develop and design the wind farm.

4.39 ***Income effects:*** the economic analysis has focused on the GVA effects of generated employment as this is the 'real' impact on the economy. However, it is worth noting that new employment will generate additional wages and salaries, much of which will be spent in the UK.

4.40 ***Exchequer effects:*** the analysis has not attempted to estimate the additional exchequer effects as result of taxes borne (Corporation Tax, Employer National Insurance and Irrecoverable VAT) and taxes collected (Income Tax, Employee National Insurance and non-

domestic business rates). These are additional financial benefits which will support the regional and national economies.

4.41 ***Effects on landowners:*** there will be a financial transaction to the land owner which may support diversification and/or other spending in the local, regional and national economy.

4.42 ***Perception benefits;*** the employment, economic and financial impacts are enhanced through wider strategic impacts associated with strengthening the perception of the area as a place to live, work, visit and invest.

Community Benefits

4.43 The Applicant has undertaken extensive consultations with the local community, and local community groups during the design of the Loch Liath Wind Farm.

4.44 The outcome of these discussions has helped to formulate a suite of community wealth measures, including:

- Statkraft's own track record and existing links with skills providers and delivering community investments, including funding scholarships with UHI;
- Community Shared Ownership;
- Committing to studies to investigate the potential for superfast broadband;
- Upgrading the upper sections of the Meall Fuar-mhonaidh footpath
- Community Benefit Fund; and,
- A series of Meet the Buyer events for local sourcing

Statkraft, the Applicant

4.45 Statkraft, Europe's largest renewable power generator, has announced a Science Technology Engineering Mathematics (STEM) Scholarship Fund in partnership with the University of the Highlands and Islands (UHI) to support two £3,000 scholarships each year for the duration of a student's course at UHI. From 2025, when all six scholarships will be in place, it will provide a contribution of £18,000 per year, with up to six students at UHI receiving support from Statkraft at any one time and represents a minimum investment of £72,000.

4.46 The Applicant has committed to funding an additional scholarship on similar terms to Statkraft's existing scholarships for a ten-year period from the point of the wind farm becoming operational. Development of this is underway with UHI. This will equate to £3,000 per year for

a duration of 10 years, equating to a £30,000 commitment towards supporting STEM and construction students through their studies.

4.47 Statkraft is proposing to upgrade the upper sections of the Meall Fuar-mhonaidh path, which will enhance access and enjoyment of the area. This is based on an initial walkover undertaken by a trained mountain guide, followed by discussions with THC and a subsequent Red Level Survey of the route. All information gathered highlighted the popular but degraded nature of the existing route and the need for significant work to ensure that the route remained accessible for walkers.

4.48 Without these enhancements, the route is expected to become inaccessible to less experienced walkers and climbers as it continues to degrade. The work undertaken by Statkraft is expected to ensure that the route continues to contribute the leisure and wellbeing of locals and visitors, whilst reducing further habitat degradation. Full details are provided in the Outline Access Management Plan. This is not considered mitigation, but is an enhancement measure which will be taken forward subject to consent being granted for the Proposed Development.

Shared Ownership

4.49 The Applicant is committed to investigating opportunities for Shared Ownership of Loch Liath Wind Farm for communities surrounding the development. By participating in shared ownership of a renewable energy project, communities can share in a range of benefits, including developing a sustainable income stream of which they have control, creating strong partnerships and building resilience in their local area. This pledge directly supports the Scottish Government's own position and guidance[22] on shared ownership of onshore renewables.

Community Benefit Fund

4.50 In addition to community shared ownership, the intended community benefit package for the Loch Liath Wind Farm includes a community benefit fund estimated to provide £429,000 (based £5,000 per MW installed capacity with 13 6.6MW turbines) and an opportunity for the local community to invest in the Loch Liath Wind Farm once operational. This totals over £15 million over the 35 year lifespan of Loch Liath Wind Farm.

4.51 Income streams from this community benefits package are expected to provide long term revenue to support local community initiatives. In development of funds for other projects, Statkraft has been led by the community to create a fund model which works for the local area. The Applicant intends to follow this model for the the Project and will work with local representatives and organisations to do this if the Proposed Development is consented. These could provide positive benefits to the local economy, local facilities and the general quality of

[22] Shared Ownership of Onshore Renewable Energy Developments, Scottish Government, 2019

life for local residents. Projects supported through similar schemes run by Statkraft have seen investment in new business grants, refurbishment of public spaces such as parks and support for initiatives intended to encourage more visitors to the area.

4.52 The mechanism for developing the local community funding programme is being developed with the local development trust (Soirbheas), which represents the Strathglass and Glen Urquhart Community Councils. Soirbheas has developed a local community plan and is experienced in administering community funding. Soirbheas and Statkraft are in the process of agreeing a Memorandum of Understanding to progress the community benefit funding programme.

Meet the Buyer and Local Sourcing

4.53 Statkraft will host 'Meet the Buyer' events and suitably qualified local firms will be invited to bid for different aspects of construction, such as foundation laying and electrical works. Construction materials, such as aggregates, will be sourced locally wherever possible and local transport and plant hire companies used wherever possible.

4.54 The relationships forged with local suppliers help projects to become successes and provide valuable investment in the local area. An example of this supply chain benefits includes work with Blargoans on the Baillie Wind Farm. Statkraft will assess main contracts more favourably if they commit to local sourcing and maximising the opportunity for local sub-contractors and suppliers.

5 Net Economic Benefit

Introduction

5.1 This section summarises the net economic benefits set out in this report.

Net Economic Benefits

5.2 Loch Liath Wind Farm delivers a wide range of economic and wider benefits and, in this way, maximises net economic benefits for the local community. This is consistent with the latest planning policy (NPF4) in Scotland. NPF4 Policy 11 (c) establishes as a requirement for renewable energy proposals that:

> *'they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business, and supply chain opportunities.'*

5.3 This shared experience has been used to develop a comprehensive package of benefits for Loch Liath Wind Farm. Through the delivery of the Loch Liath Wind Farm, it is estimated that:

- Pre-development investment and planning fees, benefitting a range of Scottish-based companies and organisations;
- 55 construction related PYEs, translating to a GVA effect of £4.52 million and a salary effect of £2.11 million as a direct result of employment onsite during the 18 month construction of Loch Liath Wind Farm.
- The potential creation of three FTEs, £105k in GVA terms and £53.8k in salary terms from the operation of the Proposed Development. Over the 35 year lifetime of the Loch Liath Wind Farm this equates to a GVA effect of £3.7 million and a salary effect of £1.9 million.

5.4 In addition, Statkraft has committed to:

- Furthering their joint working and funding relationship with University of the Highlands and Islands, and seeking to develop new scholarships dedicated to Loch Liath;
- The Applicant is committed to investigating opportunities for Shared Ownership of Loch Liath Wind Farm by communities surrounding the development to invest in.

- Working with Highlands and Island Enterprise (HIE) and the private sector provider to maximise the provision of superfast broadband in the region and the economic benefits from broadband. Statkraft completed an initial study into broadband to assess opportunities to enhance broadband coverage locally. This study was updated in 2023 following engagement with the local community council, including their input in to the scope of the study.

- Community benefit funding of £429,000 per annum and around £17.2 million (2024 prices) over the proposed 35-year operational life, and working with Soirebheas to ensure the effective and efficient distribution of community funding.

- Statkraft is also committed to a series of 'meet the buyer' events post planning and prior to construction with a view to putting in place a programme which recognises the benefit of using local contractors.

5.5 The benefits associated with the Loch Liath Wind Farm will go beyond supporting economic activity and employment during the wind farm's construction and its operation. In particular, community benefits will provide a stream of income for the local communities to be reinvested and deliver against its priorities and ambitions.

5.6 On this basis, it can be concluded that Loch Liath Wind Farm maximises net economic impact to local communities and the regional economy.