

# **Socio-Economic Assessment of the Tealing – Westfield Overhead Line 400kV Upgrade**

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A report to Scottish and Southern Electricity Networks (SSEN)  
November 2024





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# 1.

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## Executive Summary

The Tealing – Westfield Overhead Line 400kV Upgrade could deliver a total of £49.2 million Gross Value Added (GVA) and 498 years of employment across Scotland.

Investment in Scotland's energy infrastructure is essential for advancing the nation towards a sustainable future, strengthening its economic foundation, and paving the way for the realisation of Scotland's ambitious energy goals. As energy generating capacity continues to grow, particularly in the north of Scotland, it is essential to develop new, and upgrade existing, grid infrastructure to distribute this increased energy generation from both onshore and offshore renewables across the rest of the UK.

As part of this investment, SSEN is delivering the East Coast 400kV Phase 2 Project, which includes multiple onshore reinforcement projects along the east coast. This project will facilitate the transportation of clean energy from source to demand across the country, of which the Tealing – Westfield Overhead Line 400kV Upgrade (the Proposed Development) will play a fundamental role.

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**The Proposed Development could generate £3.4 million GVA and support 34 years of employment across Angus, and Perth and Kinross.**

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In addition to its strategic role, the Proposed Development is expected to support significant employment and economic activity during its development and construction. Under the core scenario, it was estimated that the total investment by SSEN in the Proposed Development could generate:

- **£3.4 million GVA and 34 years of employment** across **Fife, Angus, and Perth and Kinross**; and
- **£49.2 million GVA and 498 years of employment** across **Scotland**.

Under SSEN's community wealth building statement of intent, the scale of the economic impacts from the Proposed Development could be maximised, under the ambition scenario, through several initiatives to increase the contracts awarded to businesses within the regional and Scottish economies. This would increase the proportion of the economic benefits that would be retained within these economies and could generate:



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- **£8.5 million GVA** and **84 years of employment** across **Fife, Angus, and Perth and Kinross**; and
  - **£49.2 million GVA** and **498 years of employment** across **Scotland**.

The Proposed Development will also look to minimise any negative impact on tourism and recreation within the local area. Following a comprehensive assessment, the overall impact on tourism and recreation has been determined to be negligible. This means that the Proposed Development is not expected to disrupt local tourism activities, nor will it significantly affect visitor numbers or the recreational use of the surrounding area. This ensures that the local tourism sector continues to thrive while contributing to the region's economic growth.



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## 2.

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# Introduction

BiGGAR Economics was commissioned by SSEN to assess the potential economic impacts from the development and construction of the Proposed Development.

## 2.1 SSEN Transmission

SSEN Transmission is responsible for the electricity transmission network in northern Scotland. They maintain and invest in the high voltage electricity transmission network that consists of underground and subsea cables, overhead lines on wooden poles or steel towers, and electricity substations. Their primary goal is to ensure the provision of safe and reliable electricity supply to communities and do so through the onboarding of a combined mix of renewable energy sources.

## 2.2 Project Background

Given the rate and scale of increased generating capacity development, additional export routes will be required and SSEN has identified the need to upgrade the existing overhead line between Tealing and Westfield, necessitating the development of the Proposed Development.

The Proposed Development is a key component of the wider East Coast 400kV Phase 2 Project, as shown in Figure 2-1. This project includes several onshore reinforcement initiatives along Scotland's east coast and will support the distribution of increased energy generation from onshore and offshore renewable developments across northern Scotland. Ultimately, these projects will facilitate the transportation of clean energy from source to demand across the UK, contributing to Scotland and the UK's Net Zero agenda.



**Figure 2-1: East Coast 400kV Phase 2 Projects**



Source: SSEN (2024). East Coast 400kV Phase 2 Project Map.

## 2.3 Report Structure

The remainder of this report is structured as follows:

- Section 3 considers the economic impact of the Proposed Development;
- Section 4 sets out the economic impacts generated by the Proposed Development in the strategic and socio-economic context of the region;
- Section 5 sets tourism in the area in context and considers the relationship between the Proposed Development and the local tourism economy;
- Appendix A provides the methodology for estimating the economic impact of the Proposed Development; and
- Appendix B includes a list of local tourist attractions.



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## 3. Economic Impacts

The Proposed Development could generate £49.2 million GVA and support 498 years of employment across Scotland.

### 3.1 Capital Investment

The development and construction of the Proposed Development will involve substantial capital investment, covering the manufacturing, construction, and installation of overhead lines and underground cabling. A portion of this investment, proposed by SSEN, will be allocated to local, Scottish, and UK companies, leading to increased turnover within these regions.

SSEN has provided a high-level breakdown of the investment, and where necessary, detailed assumptions were made regarding how this expenditure might be distributed across different categories. For each category, assumptions were made about the proportion of contracts that could be secured in each area, along with the relevant sectors for each contract. These estimates were informed by SSEN's experience with similar projects and BiGGAR Economics' expertise in the sector.

The economic impact analysis outlined in this chapter is based on the creation of two supply chain expenditure scenarios, which make assumptions on the location of businesses which are awarded contracts during the development and construction of the Proposed Development. The two scenarios are:

- core scenario: based on the minimum level of content that could realistically be achieved locally. This can be considered as a worst-case scenario; and
- ambition scenario: the potential local economic benefits that could be realised from the full implementation of a local supply chain development plan.

While the total investment remains the same in both scenarios, the ambition scenario retains a larger share of the expenditure within the regional and Scottish economies. The following section presents the economic impact that could be generated under the core scenario.

### 3.2 Economic Impact: Core Scenario

An Input-Output economic model was developed to estimate the economic impact of the Proposed Development. The first step was to consider the direct GVA supported by the Proposed Development. To estimate this, turnover by contract category was divided by a sectoral turnover per GVA ratio, as sourced from the Scottish Annual



Business Statistics<sup>1</sup> and the UK Annual Business Survey<sup>2</sup>. Sectoral allocation of contract categories was based on a mapping of each contract against a level 2 Standard Industrial Classification (SIC) code<sup>3</sup>.

It was estimated that the development and construction of the Proposed Development could generate £2.8 million direct GVA in the combined study area of Fife, Angus, and Perth and Kinross, £29.9 million direct GVA in Scotland, and £48.6 million direct GVA across the UK.

**Table 3-1: Core Scenario – Direct GVA by Contract Category (£m)**

		Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Development		1.0	7.7	9.3
Overhead Lines	Manufacturing	-	-	12.8
	Construction	1.1	11.4	11.5
	Installation	0.7	10.5	14.4
Underground Cables	Manufacturing	-	-	0.2
	Construction	0.0	0.2	0.2
	Installation	0.0	0.2	0.2
<b>Total Direct GVA</b>		<b>2.8</b>	<b>29.9</b>	<b>48.6</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

Similarly, the direct employment generated by each of the contract categories was estimated by dividing the turnover of each contract by the relevant sectoral turnover per job ratio. It was estimated that the development and construction of the Proposed Development could support 28 direct years of employment in the combined study area of Fife, Angus, and Perth and Kinross, 299 direct years of employment in Scotland, and 496 direct years of employment across the UK.

<sup>1</sup> Scottish Government (2023), Scottish Annual Business Statistics 2021.

<sup>2</sup> UK Government (2024), UK Annual Business Survey 2022.

<sup>3</sup> Office for National Statistics (2009), UK Standard Industrial Classification of Economic Activities 2007 (SIC 2007).





**Table 3-2: Core Scenario – Direct Employment by contract Category (Years of Employment)**

		Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Development		11	85	108
Overhead Lines	Manufacturing	-	-	141
	Construction	9	88	91
	Installation	8	122	151
Underground Cables	Manufacturing	-	-	2
	Construction	0	1	1
	Installation	0	2	2
<b>Total Direct Employment</b>		<b>28</b>	<b>299</b>	<b>496</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

To estimate the indirect (supply chain) and induced (staff spending) impacts, it was necessary to multiply the direct GVA and direct employment supported by each contract category by the relevant sectoral GVA and employment Type 1 and Type 2 economic multipliers<sup>4</sup>.

It was estimated the GVA impact associated with the multiplier effects could generate £0.6 million GVA in the combined study area of Fife, Angus, and Perth and Kinross, £19.3 million GVA in Scotland, and £79.6 million GVA across the UK.

**Table 3-3: Core Scenario – Multiplier GVA (£m)**

	Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Indirect GVA	0.4	10.9	41.5
Induced GVA	0.3	8.4	38.1
<b>Total Multiplier GVA</b>	<b>0.6</b>	<b>19.3</b>	<b>79.6</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

It was estimated the employment impact associated with the multiplier effects could support 6 years of employment in the combined study area of Fife, Angus, and Perth

<sup>4</sup> More details on the methodology are provided in the Appendix A: Methodology.



and Kinross, 199 years of employment in Scotland, and 767 years of employment across the UK.

**Table 3-4: Core Scenario – Multiplier Employment (Years of Employment)**

	Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Indirect Employment	4	114	390
Induced Employment	2	85	378
<b>Total Multiplier Employment</b>	<b>6</b>	<b>199</b>	<b>767</b>

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

The combined direct, indirect, and induced impacts of the development and construction of the Proposed Development are estimated to generate a total of £3.4 million GVA and 34 years of employment in the combined study area of Fife, Angus, and Perth and Kinross, £49.2 million GVA and 498 years of employment in Scotland, and £162.9 million GVA and 1,608 years of employment across the UK.

**Table 3-5: Core Scenario – Total GVA (£m) and Employment Impact (Years of Employment)**

	Combined Fife, Angus, and Perth and Kinross	Scotland	UK
<b>Total GVA</b>	<b>3.4</b>	<b>49.2</b>	<b>128.2</b>
<b>Total Employment</b>	<b>34</b>	<b>498</b>	<b>1,263</b>

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

### 3.3 Maximising Economic Impact

The scale of the economic impacts from the development and construction of the Proposed Development could be maximised. The recommendations outlined include both sectoral guidance and suggestions to maximise impact in both the short and long term.

#### 3.3.1 Sectoral Guidance

Grid infrastructure plays a crucial role in delivering clean, affordable energy and is key to achieving a just transition to net zero. In addition to reducing emissions, energy developments offer significant potential for driving local economic growth. However, to fully realise these local benefits, developers and stakeholders must actively aim for a high level of local content in their projects.



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To support this objective, guidance has been developed, offering strategies for developers to maximise local economic benefits. A key resource is RenewableUK's Local Supply Chain in Onshore Wind: Good Practice Guide. While this is aimed at onshore wind, the principles are applicable to grid infrastructure. It provides the following recommendations:

- maximise local presence and start early: begin identifying potential local suppliers as early as possible by engaging and maintaining visibility in the community;
- leverage partnerships: collaborate with local business groups and authorities to enhance opportunities;
- act as an enabler: use information on local suppliers to ensure primary contractors prioritise local opportunities;
- provide timely information: adopt an iterative communication process with businesses, allowing them time to adapt and respond to opportunities;
- communicate technical requirements early: this allows local businesses time to upskill or form consortia where necessary; and
- demonstrate local content in planning: where feasible, include a clear commitment to local content in planning submissions and perform post-project audits.

While these principles are broadly applicable, developers can amplify their local economic impact by implementing more targeted actions, depending on whether the interventions are short- or long-term.

Some of these initiatives can be integrated quickly, delivering immediate benefits to the local content of the Proposed Development. Others require more time and engagement across a wider range of stakeholders, but they offer the potential for substantial future benefits.

### **3.3.2 Maximising Economic Benefits in the Short Term**

In the short term, the focus should be on areas with the greatest potential for regional content, particularly within construction and installation contracts. Key actions include:

- prioritising regional and Scottish content during the Tier 1 tendering process;
- collaborating with Tier 1 suppliers to open opportunities for new entrants in the sector, especially businesses with experience in other industries that could transition to these contracts;
- developing an online portal to advertise all contracts associated with the Proposed Development; and
- engaging local communities to identify job opportunities that could be filled by local workers during the construction phase.

### **3.3.3 Maximising Economic Benefits in the Long Term**

In the long term, efforts should focus on building a local supply chain in areas where current capacity is limited within the local area, and Scotland as a whole. Gathering



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data can help establish a baseline, enabling future projects to set higher targets for local content. Key long-term actions include:

- integrating Scottish content requirements into the Tier 1 tender process, encouraging suppliers to estimate the proportion of Scotland-based content. While this need not be a scored element, it can promote early-stage consideration of local content;
- formalising reporting requirements for Tier 1 suppliers to track their use of local and Scottish content;
- requiring Tier 1 contractors to support local skills development through initiatives such as apprenticeships; and
- evaluating the effectiveness of both developer and Tier 1 contractor engagements to inform and improve future projects.

### 3.4 Economic Impact: Ambition Scenario

Implementing these recommendations is expected to result in an increase in contracts awarded to businesses within the regional and Scottish economies. This would increase the proportion of the economic benefits that would be retained within these economies.

The economic impact analysis of the ambition scenario follows an identical modelling process as the core scenario, but with a greater proportion of the development and construction expenditure apportioned to the regional and Scottish economies.

Estimates based on the same method indicate that under the ambition scenario, the development and construction of the Proposed Development could generate £6.9 million in direct GVA within the combined study area of Fife, Angus, and Perth and Kinross, £29.9 million in Scotland, and £61.6 million across the UK.



**Table 3-6: Ambition Scenario – Direct GVA by Contract Category (£m)**

		Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Development		1.9	7.7	9.3
Overhead Lines	Manufacturing	-	-	25.6
	Construction	2.8	11.4	11.5
	Installation	2.1	10.5	14.4
Underground Cables	Manufacturing	-	-	0.3
	Construction	0.0	0.2	0.2
	Installation	0.0	0.2	0.2
<b>Total Direct GVA</b>		<b>6.9</b>	<b>29.9</b>	<b>61.6</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

Similarly, under the ambition scenario it was estimated that the development and construction of the Proposed Development could support 69 direct years of employment in the combined study area of Fife, Angus, and Perth and Kinross, 299 direct years of employment in Scotland, and 638 direct years of employment across the UK.

**Table 3-7: Ambition Scenario – Direct Employment by contract Category (Years of Employment)**

		Combined Fife, Angus, and Perth and Kinross	Scotland	UK
Development		21	85	108
Overhead Lines	Manufacturing	-	-	281
	Construction	22	88	91
	Installation	24	122	151
Underground Cables	Manufacturing	-	-	3
	Construction	0	1	1
	Installation	0	2	2
<b>Total Direct Employment</b>		<b>69</b>	<b>299</b>	<b>638</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.

It was estimated under the ambition scenario that the GVA impact associated with the multiplier effects could generate £1.5 million GVA in the combined study area of



Fife, Angus, and Perth and Kinross, £19.3 million GVA in Scotland, and £101.3 million GVA across the UK.

**Table 3-8: Ambition Scenario – Multiplier GVA (£m)**

	<b>Combined Fife, Angus, and Perth and Kinross</b>	<b>Scotland</b>	<b>UK</b>
Indirect GVA	0.9	10.9	52.6
Induced GVA	0.7	8.4	48.8
<b>Total Multiplier GVA</b>	<b>1.5</b>	<b>19.3</b>	<b>101.3</b>

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

It was estimated under the ambition scenario the employment impact associated with the multiplier effects could support 15 years of employment in the combined study area of Fife, Angus, and Perth and Kinross, 199 years of employment in Scotland, and 970 years of employment across the UK.

**Table 3-9: Ambition Scenario – Multiplier Employment (Years of Employment)**

	<b>Combined Fife, Angus, and Perth and Kinross</b>	<b>Scotland</b>	<b>UK</b>
Indirect Employment	9	114	486
Induced Employment	6	85	484
<b>Total Multiplier Employment</b>	<b>15</b>	<b>199</b>	<b>970</b>

Source: BiGGAR Economics Analysis. Totals may not sum due to rounding.

The combined direct, indirect, and induced impacts under the ambition scenario of the development and construction of the Proposed Development are estimated to generate a total of £8.5 million GVA and 84 years of employment in the combined study area of Fife, Angus, and Perth and Kinross, £49.2 million GVA and 498 years of employment in Scotland, and £162.9 million GVA and 1,608 years of employment across the UK.



**Table 3-10: Ambition Scenario – Total GVA (£m) and Employment Impact (Years of Employment)**

	<b>Combined Fife, Angus, and Perth and Kinross</b>	<b>Scotland</b>	<b>UK</b>
<b>Total GVA</b>	<b>8.5</b>	<b>49.2</b>	<b>162.9</b>
<b>Total Employment</b>	<b>84</b>	<b>498</b>	<b>1,608</b>

Source: BIGGAR Economics Analysis. Totals may not sum due to rounding.



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## 4.

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# Impact in Context

The Proposed Development will generate economic opportunities across Fife, Angus, and Perth and Kinross, and has the opportunity to drive progress towards the strategic priorities of the region.

## 4.1 Key Socio-Economic Indicators

Since the Proposed Development runs through several local authorities, this section considers the socio-economic structure of the following study areas:

- Combined Fife, Angus, and Perth and Kinross; and
- Scotland.

Given the nature of the Proposed Development, it is important to note that while the socio-economic analysis considers the broader context of the surrounding areas, the Proposed Development itself is confined to a narrow corridor running through these study areas. As such, the socio-economic structure may vary within the wider study areas compared to the immediate vicinity of the Proposed Development.

### 4.1.1 Population Estimates

In 2022, Fife, Angus, and Perth and Kinross had a combined population of 644,600, accounting for 11.8% of Scotland's total population of 5,479,900.

The working-age population (aged 16 to 64) across Fife, Angus, and Perth and Kinross accounted for 61.0% of the population, lower than the proportion across Scotland as a whole (63.8%).

In the same year, 22.5% of the population across Fife, Angus, and Perth and Kinross, was over the age of 65, exceeding the national average of 19.6%.





**Table 4-1: Population Estimates, 2022**

	<b>Combined Fife, Angus, Perth and Kinross</b>	<b>Scotland</b>
<b>Total</b>	<b>644,600</b>	<b>5,479,900</b>
0-15	16.5%	16.6%
16-64	61.0%	63.8%
65+	22.5%	19.6%

Source: ONS (2023), Population Estimates – Local authority based by five-year age band.

#### **4.1.2 Population Projections**

National Records of Scotland provide population projections at the local authority and Scottish geographic levels. While information is not available at the electoral ward level, current population estimates and future trends at the local authority level can be used to form a view of more localised trends.

Over the period of 2022 to 2043, the population of Fife, Angus, and Perth and Kinross, is expected to decrease by 2.9%, a decline of approximately 19,000 people. In contrast, the population of Scotland is projected to increase by 1.7%, to approximately 5.6 million.

Over the same period, the share of the working-age population across Fife, Angus, and Perth and Kinross, is projected to fall by 4.7 percentage points (equivalent to the reduction of approximately 40,800 people), while the share of those aged 65+ is projected to increase 6.8 percentage points.

Scotland is predicted to follow a similar but less marked trend, with the share of the working-age population projected to decrease by 3.5 percentage points, and the share of those aged 65+ projected to rise by 5.3 percentage points.

These demographic trends suggest that a declining working-age population will have to support an increasingly ageing population, and it is therefore crucial for Fife, Angus, and Perth and Kinross to attract and retain working-age individuals.



**Table 4-2: Population Projections, 2022-2043**

	Combined Fife, Angus, Perth and Kinross		Scotland	
	2022	2043	2022	2043
<b>Total</b>	<b>644,600</b>	<b>625,600</b>	<b>5,479,900</b>	<b>5,574,800</b>
0-15	16.5%	14.4%	16.6%	14.8%
16-64	61.0%	56.3%	63.8%	60.3%
65+	22.5%	29.3%	19.6%	24.9%

Source: ONS (2023), Population Estimates – Local authority based by five-year age band; National Records of Scotland (2020), Population Projections for Scottish Areas (2018-based).

#### **4.1.3 Industrial Structure**

As illustrated in Table 4-3, in 2022 the highest proportion of employment across Fife, Angus, and Perth and Kinross was in wholesale and retail trade, accounting for 14.4% of total employment. Employment in this sector was higher than in Scotland as a whole (12.8%).

Of those working in Fife, Angus, and Perth and Kinross, 6.0% were employed in the construction industry, compared to the Scottish average of 5.6%. This sector is one of the primary areas of opportunity for contracts associated with the construction phase of the Proposed Development.

The electricity, gas, steam and air conditioning sector, which may support some of the installation works, employs a significantly larger proportion of the population across Fife, Angus, and Perth and Kinross (1.5%), compared to Scotland as a whole (0.7%).

The share of employment in the professional, scientific and technical activities sector, usually associated with project development activity, is underrepresented across Fife, Angus, and Perth and Kinross (5.0%), compared to the Scottish average (7.4%).



**Table 4-3: Industrial Structure, 2022**

	<b>Combined Fife, Angus, Perth and Kinross</b>	<b>Scotland</b>
Wholesale and retail trade	14.4%	12.8%
Human health and social work activities	13.8%	15.1%
Accommodation and food service activities	9.2%	8.2%
Manufacturing	9.1%	6.6%
Education	8.9%	8.4%
Public administration and defence	6.2%	6.2%
Construction	6.0%	5.6%
Agriculture, forestry and fishing	5.9%	3.4%
Professional, scientific and technical activities	5.0%	7.4%
Administrative and support service activities	4.8%	7.8%
Transportation and storage	4.0%	4.0%
Arts, entertainment and recreation	3.1%	2.9%
Other service activities	2.2%	1.7%
Information and communication	2.0%	3.1%
Financial and insurance activities	1.9%	3.1%
Electricity, gas, steam and air conditioning supply	1.5%	0.7%
Real estate activities	1.1%	1.4%
Water supply activities	0.7%	0.7%
Mining and quarrying	0.1%	1.0%
<b>Total Employment</b>	<b>249,000</b>	<b>2,622,000</b>

Source: ONS (2023), Business Register and Employment Survey, 2022.



#### 4.1.4 Economic Activity

In Fife, Angus, and Perth and Kinross, the unemployment rate was 3.1%, lower than the Scottish average of 3.4%. Additionally, the region’s economic activity rate was 77.4%, slightly lower than the rate across Scotland as a whole, which stood at 77.9%.

Table 4-4 also shows that the median annual gross wage for residents in Fife, Angus, and Perth and Kinross was £27,036, which is slightly below the national average of £27,683.

**Table 4-4: Labour Market Indicators, 2022**

	Combined Fife, Angus, Perth and Kinross	Scotland
Economically Active (%)	77.4%	77.9%
Unemployment Rate (%)	3.1%	3.4%
Median Annual Gross Wage (resident analysis)	£27,036	£27,683

Source: ONS (2024), Annual Population Survey Oct 2022-Sept 2023; ONS (2024), Annual Survey of Hours and Earnings – resident analysis (data for 2022).

#### 4.1.5 Education

As illustrated in Table 4-5, across Fife, Angus, and Perth and Kinross, 50.0% of people have achieved at least a National Vocational Qualification Level 4 (NVQ4) qualification, equivalent to a higher education certificate. This is the same as the share across Scotland as a whole.

The proportion of people who have achieved no qualifications across the region (5.9%) is lower than across Scotland as a whole (7.8%).

**Table 4-5: Qualification Levels, 2022**

	Combined Fife, Angus, Perth and Kinross	Scotland
NVQ4+	50.0%	50.0%
NVQ3+	65.9%	64.8%
NVQ2+	81.6%	79.6%
NVQ1+	89.9%	86.4%
Other Qualifications	4.2%	5.8%
No Qualifications	5.9%	7.8%

Source: ONS (2023), Annual Population Survey Jan 2022 – Dec 2022.



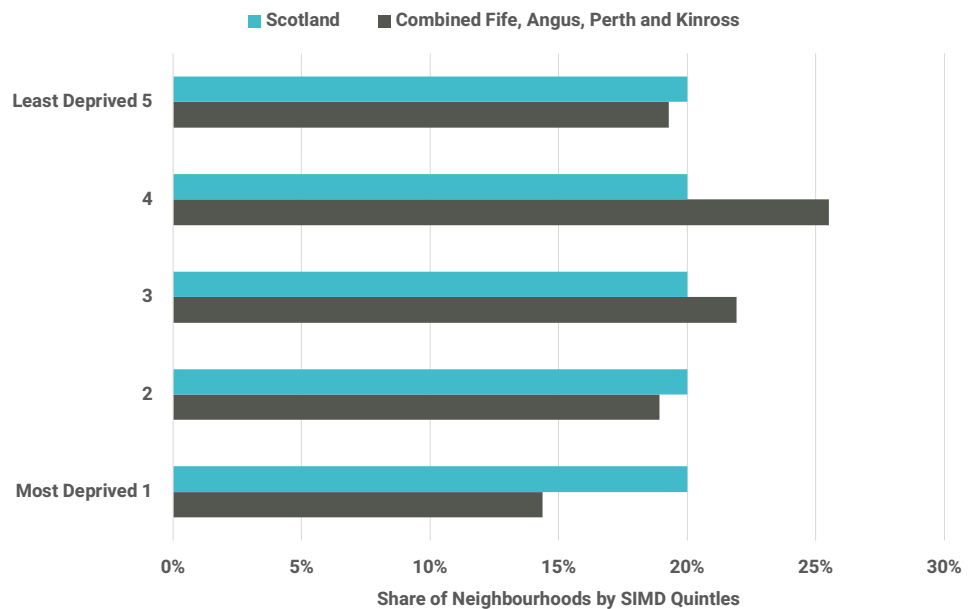
#### 4.1.6 Scottish Index of Multiple Deprivation

The Scottish Index of Multiple Deprivation (SIMD) is a relative measure of deprivation which ranks small areas across seven dimensions: income, employment, education, health, access to services, crime and housing. These areas can be ranked based on which quintile (fifth of the distribution) they belong to, with a small area in the first quintile being in the 20% most deprived areas in Scotland.

As shown in Figure 4-1, Fife, Angus, and Perth and Kinross are made up of 835 small areas, of which 14% are in the most deprived quintile, and 19% are in the least deprived quintile. Most of the small areas in Fife, Angus, Perth and Kinross are clustered in the middle of the distribution, with 19% in the second quintile, 22% in the third, and 26% in the fourth.

Larger shares of small areas in the least deprived quintiles may indicate favourable economic conditions for the Proposed Development, as it suggests that the region is more likely to have the necessary infrastructure and services to support growth and development. However, there are still neighbourhoods across the region falling within the most deprived quintile. By generating economic activity and social benefits, the Proposed Development holds the potential to contribute to more inclusive and equitable growth.

**Figure 4-1: SIMD Distribution of Study Areas**



Source: Scottish Government (2020), Scottish Index of Multiple Deprivation 2020.

#### 4.1.7 Fuel Poverty

Scottish legislation defines a household as being in fuel poverty when more than 10% (or 20% for extreme fuel poverty) of income is required to pay for heating<sup>5</sup>. As illustrated in Table 4-6, fuel poverty statistics have been segregated by local authority

<sup>5</sup> Scottish Government (2021). Home Energy and Fuel Poverty.



due to the notable differences between Fife, Angus, and Perth and Kinross. A combined rate is also provided to offer a broader context of the surrounding areas.

Whilst the latest available data has been used, it is likely, given the rise in energy prices beginning in 2022, that there has been a further increase in the number of households that are in fuel poverty.

The proportion of people living in fuel poverty in 2019 was 22% in Angus, 25% in Perth and Kinross, and 24% in Fife, giving a combined rate of 24%. This is slightly below the Scottish average of 25%.

The proportion of people living in extreme fuel poverty also varied across the regions, with 10% in Angus, 18% in Perth and Kinross and 11% in Fife. This results in a combined rate of 12%, which aligns with the national average.

Residents aged 65 and older are particularly vulnerable to fuel poverty, as they are more likely to be living on a fixed income, spending long periods of time at home, and living in substandard housing. Given that the population demographics in the region show that this age group is overrepresented and is projected to increase over the next two decades, fuel poverty is likely to be an ongoing issue across Fife, Angus, and Perth and Kinross.

**Table 4-6: Fuel Poverty, 2019**

	Angus	Perth and Kinross	Fife	Combined Fife, Angus, Perth and Kinross	Scotland
Fuel Poverty	22%	25%	24%	24%	25%
Extreme Fuel Poverty	10%	18%	11%	12%	12%

Source: Scottish Government (2021), Scottish House Condition Survey: Local Authority Analysis 2019.

#### **4.1.8 Community Wealth Building**

Both segregated and combined community wealth building indicators have been provided in Table 4-7 to provide a more comprehensive overview of the regions in which the Proposed Development is located.

Perth and Kinross has 14 social enterprises per 10,000 residents, compared to 10 in Angus and 7 in Fife, resulting in a combined rate of 9 per 10,000 across all regions. This is below the Scotland-wide rate of 11, indicating a need for more locally owned businesses with a social purpose to help retain wealth locally.



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With respect to land ownership, the land owned by communities across all three regions is 0.06%<sup>6</sup>. This rate varies across the region, with 0.02% in Angus, 0.09% in Perth and Kinross, and 0.07% in Fife. Whilst these rates are comparable to many other local authorities, this is below the Scottish average and could limit the potential for wealth to be retained in the community.

The gender pay gap also varies significantly across the three regions, with a gap of 16.0% in Angus, 15.6% in Perth and Kinross, and a negative gap of -2.5% in Fife. Additionally, 19.3% of employees in Angus earn below the real living wage, compared to 11.7% in both Fife and Perth and Kinross. These statistics illustrate that there may be limited opportunities for fair employment in the region, particularly in Angus.

Furthermore, of those living in Angus, only 9.4% feel that they have an influence over local decisions, compared to 26.4% in Perth and Kinross, 25.5% in Fife, and 17.8% of people across Scotland<sup>7</sup>.

Whilst this data doesn't fully cover the CWB pillars, it does suggest that there is an opportunity to develop CWB in conjunction with local anchors institutions across Fife, Angus, and Perth and Kinross.

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<sup>6</sup> Community Ownership in Scotland 2022, Scottish Government (2022) - <https://www.gov.scot/publications/community-ownership-in-scotland-2022/documents/>

<sup>7</sup> Wellbeing Economy Monitor: Excel Tool – Updated July 2023 - <https://www.gov.scot/publications/wellbeing-economy-toolkit-supporting-place-based-economic-strategy-policy-development/documents/>



**Table 4-7: Community Wealth Building Indicators**

	Angus	Perth and Kinross	Fife	Combined Fife, Angus, Perth and Kinross	Scotland
Social enterprises per 10,000 of the population (2021)	10	14	7	9	11
Community land ownership (2022)	0.02%	0.09%	0.07%	0.06%	2.73%*
Gender pay gap (2023)	16.0%	15.6%	-2.5%	5.2%	8.7%
Employees earning below the real living wage % (2023)	19.3%	11.7%	11.7%	13.1%	10.1%
Influence over local decisions (2022)	9.4%	26.4%	25.5%	22.8%	17.8%

Source: Community Ownership in Scotland 2022, Scottish Government (2022); Wellbeing Economy \*(0.13% excl. Outer Hebrides) Monitor: Excel Tool.

By addressing each of the five CWB pillars through initiatives such as prioritising local procurement and investing in skills development, SSEN can help to maximise the economic benefits of the Proposed Development and retain long-lasting wealth within local communities.

#### 4.1.9 Wellbeing

One way of gauging the social welfare of a local area is through calculating the Wellbeing-Adjusted Life Years, known as WELLBYs. WELLBYs are calculated by multiplying life expectancy of an area by its average self-reported life satisfaction on a 0 to 10 scale<sup>8</sup>. WELLBYs can be compared and contrasted across Scotland and the UK.

Underpinning this approach is the 2021 World Happiness Report, Layard and Oparina<sup>9</sup>, which makes the case that people want to experience lives that are both long and happy. With that in mind, they advocate that a society should aim to maximise the number of WELLBYs across their population both now and in the

<sup>8</sup> BiGGAR Economics (2023). Toward a Wellbeing Economy: The Distribution of Wellbeing in the UK.

<sup>9</sup> Layard, R. and Oparina, E (March 2021), Living Long and Living Well: The WELLBY Approach, Chapter 8 of World Happiness Report 2021 (Sustainable Development Solutions Network).





future. That is, maximising a combination of both life expectancy and self-reported wellbeing.

As shown in Table 4-8, the combined life expectancy across Fife, Angus, and Perth and Kinross, is 79.9, one year greater than the Scottish average of 78.9. Additionally, the region reports a combined life satisfaction score of 7.5, which is slightly higher than the national average of 7.4. This gives Fife, Angus, and Perth and Kinross, an overall WELLBY score of 605, which is greater than the Scottish average of 587.

**Table 4-8: WELLBYs**

	Angus	Perth and Kinross	Fife	Combined Fife, Angus, Perth and Kinross	Scotland
Life expectancy (years)	80.4	80.9	79.3	79.9	78.9
Life satisfaction	7.5	7.7	7.4	7.5	7.4
WELLBYs	605	620	586	605	587

Source: BiGGAR Economics (2023). *Toward a Wellbeing Economy: The Distribution of Wellbeing in the UK.*

Self-reported life satisfaction, and consequently WELLBY scores, are dependent upon a variety of factors, including local economic conditions, community vitality and involvement, as well as culture and the natural environment.

While the WELLBY score demonstrates that the quality of life in the region is greater than Scotland as a whole, it is important to consider indicators of wellbeing across each local authority, as illustrated by Table 4-9.

For example, the combined region shows relatively good mental health, with a score of 49.5 on the Warwick-Edinburgh Mental Wellbeing Scale compared to the Scottish average of 48.9. Other wellbeing indicators vary across the local authority areas, including access to green and blue spaces, with 80% of residents in Perth and Kinross living within a 5-minute walk of a green or blue space, compared to 68% in Angus, 77% in Fife, and a Scottish average of 70%.

Other wellbeing indicators across Fife, Angus, and Perth and Kinross are less favourable. For instance, 29% of residents report feelings of loneliness some or most of the time, exceeding the Scottish average of 23%. Additionally, the region's combined greenhouse gas emissions stand at 9.0 tonnes of CO2 per capita, higher than the Scottish average of 7.4 tonnes. As such, improvements to wellbeing within this region are still important.

More generally, with respect to the National Performance Framework, Angus and Perth and Kinross exhibit a particularly strong wellbeing performance on poverty and



community outcomes, whilst Fife performs most strongly on economy, poverty and fair work & business.

**Table 4-9: Wellbeing Indicators**

	Angus	Perth and Kinross	Fife	Combined Fife, Angus, Perth and Kinross	Scotland
Mental health (WEMWBS, 2018-2022)	50.2	50.7	48.8	49.5	48.9
Suicide rates per 100,000 (2022)	11.0	16.1	13.1	13.4	13.9
Good or very good health (2018-2022)	72%	79%	70%	73%	72%
Feelings of loneliness some or most of the time (2022)	19%	20%	36%	29%	23%
Within a 5-minute walk of a green or blue space (2022)	68%	80%	77%	76%	70%
Children living in low-income families (2022)	20.6%	17.9%	23.2%	21.5%	20.8%
Low or no qualifications (2022)	8.2%	7.1%	10.9%	9.5%	9.9%
Very low physical activity levels (2018-2022)	24%	13%	21%	20%	20%
Greenhouse gas emissions (tonnes of CO2 per capita, 2021)	10.9	8.5	8.7	9.0	7.4

Source: Community Ownership in Scotland 2022, Scottish Government (2022); Wellbeing Economy Monitor: Excel Tool, Public Health Scotland, Scottish Health Survey.



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## 4.2 UK Strategic Context

This section outlines the primary strategies that support the UK government's energy ambitions as well as its broader socio-economic objectives. These include:

- Build Back Better: Our Plan to Growth;
- Net Zero Strategy: Build Back Greener; and
- Strategy and Policy Statement for Energy Policy in Great Britain.

Overall, the Proposed Development will support a considerable number of the key priority areas of these national strategies, including:

- supporting the delivery of a just transition;
- enabling Net Zero infrastructure;
- supporting the security of domestic energy production;
- improving the long-term sustainability of the UK's energy systems; and
- enhancing inclusive growth across the regions of the UK.

### 4.2.1 Build Back Better: Our Plan to Growth

In 2021, the UK government introduced its "Build Back Better" economic growth plan, replacing the previous industrial strategy. The plan reflects the evolving economic environment and aims to create growth in both new and emerging industries, as well as in established sectors across the UK. The plan is built on three key pillars of investment – infrastructure, skills, and innovation. The strategy notes that all growth generated must be inclusive and equal and aims to:

- level up the whole of the UK;
- support the transition to Net Zero; and
- support vision for Global Britain.

The strategy highlights opportunities in achieving Net Zero for economic growth and job creation across the country. Additionally, the UK industrial base provides a strong foundation for securing new market opportunities arising from the transition to Net Zero.

### 4.2.2 Net Zero Strategy: Build Back Greener

Following the recommendations made by the UK Climate Change Committee in 2019, the UK Government legislated a Net Zero emissions target for 2050. The UK's Net Zero Strategy<sup>10</sup> sets out policies and proposals for decarbonising all sectors of the UK economy to meet this target.

The strategy consistently emphasises that achieving carbon neutrality across various sectors requires the electrification of economic activity. Whilst this is not true for all industries, the strategy highlights that the supply of electricity will need to

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<sup>10</sup> UK Government (2021) Net Zero Strategy: Build Back Greener.



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increase considerably by 2050 to match demand, with an increasing share from renewables.

The strategy acknowledges that increasing electricity generation will rely on transforming the infrastructure needed to deliver them, including building out a flexible grid. By supporting the electrification of the energy system, the Proposed Development will play a strategic role in providing the transmission infrastructure necessary for the UK to transition to Net Zero.

#### **4.2.3 Strategy and Policy Statement for Energy Policy in Great Britain**

In 2024, the UK Government published the Strategy and Policy Statement for Energy Policy in Great Britain. This statement complements key publications, including the Net Zero Strategy<sup>11</sup>, British Energy Security Strategy<sup>12</sup>, and the Transmission Acceleration Plan<sup>13</sup>. It aims to provide guidance to the energy sector on the actions and decisions needed to achieve the government's policy goals, emphasising areas where a strategic shift in the energy industry is expected.

The statement outlines a series of priorities aimed at achieving three key objectives of Great Britain's energy policy. These priorities are organised under the following headings:

- enabling clean energy and Net Zero infrastructure;
- ensuring energy security and protecting consumers; and
- ensuring the energy system is fit for the future.

The strategy acknowledges that, in order to enable clean energy deployment and meet the demands of a decarbonised energy system, a network infrastructure needs to be built at scale and pace. Additionally, it prioritises building reliable and sustainable network infrastructure that is effectively connected to broader markets.

### **4.3 Scotland's Strategic Context**

The Proposed Development will support several national strategies, including:

- Scotland's National Performance Framework;
- Programme for Government 2024-25: Serving Scotland;
- Scotland's National Strategy for Economic Transformation (NSET);
- National Planning Framework (NPF) 4;
- Green Industrial Strategy 2024; and
- Tourism Strategy: Scotland's Outlook 2030.

Overall, the Proposed Development will support a considerable number of the key priority areas of these national strategies, particularly Scotland's focus of improving sustainability and the transition to Net Zero by:

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<sup>11</sup> Department for Energy Security and Net Zero (2021) Net Zero Strategy: Build Back Greener.

<sup>12</sup> Department for Energy Security and Net Zero (2022) British Energy Security Strategy.

<sup>13</sup> Department for Energy Security and Net Zero (2023) The Transmission Acceleration Plan.



- enabling the increased generation, transmission and utilisation of renewable electricity throughout Scotland and the rest of the UK;
- investing in essential infrastructure;
- generating economic benefit in the form of GVA and job creation;
- supporting wider skills development;
- aiding population attraction and retention through job opportunities;
- developing and utilising the local businesses and supply chain; and
- enhancing inclusive growth in communities.

#### 4.3.1 Scotland's National Performance Framework

The National Performance Framework<sup>14</sup> 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”.

The National Performance Framework is designed to give a more rounded view of economic performance and progress towards achieving sustainable and inclusive economic growth and well-being across Scotland and aims to:

- create a more successful country;
- give opportunities to all people living in Scotland;
- increase the well-being of people living in Scotland;
- create sustainable and inclusive growth; and
- reduce inequalities and give equal importance to economic, environmental and social progress.

The National Performance Framework sets out 11 outcomes, underpinned by 81 indicators, that combine to give a better picture of how the country is progressing towards these goals. As well as Gross Domestic Product (GDP) and employment measures, the Framework's outcomes reflect the desired fabric of communities and culture, education, the environment, health and well-being and measures to help tackle poverty. It is these indicators on which the Scottish Government focuses its activities and spending to help meet the national outcomes.

The 11 national outcomes are that people:

- **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;

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<sup>14</sup> Scottish Government (2023), Scotland's National Performance Framework.



- **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; and
- **poverty:** tackle poverty by sharing opportunities, wealth and power more equally.

#### 4.3.2 Programme for Government 2024-25: Serving Scotland

Published in September 2024, the Programme for Government<sup>15</sup> sets out the Scottish Government's commitments with the purpose of improving people's lives by focusing on four clear priorities, including:

- eradicating child poverty;
- growing the economy;
- tackling the climate emergency; and
- ensuring high quality and sustainable public services.

The programme outlines key initiatives under each of the four priorities, several with relevance to the Proposed Development. In particular, the Scottish Government highlights the economic opportunities associated with the path to Net Zero, and the importance of creating the right enabling environment to support businesses which generate jobs and wealth for communities.

#### 4.3.3 Scotland's National Strategy for Economic Transition

In March 2022, the Scottish Government published the National Strategy for Economic Transformation<sup>16</sup> (NSET), which set out its ambition for Scotland's economy over the next decade. The Scottish Government's vision is to create a wellbeing economy where society thrives across economic, social and environment dimensions, and delivers prosperity for all Scotland's people and places.

To deliver its vision, the strategy outlines six initiatives, including:

- establishing Scotland as a world-class entrepreneurial nation;
- strengthening Scotland's position in new markets and industries, generating new, well-paid jobs from a just transition to Net Zero;
- making Scotland's businesses, industries, regions, communities and public services more productive and innovative;
- ensuring that people have the skills they need to meet the demands of the economy, and that employers invest in their skilled employees;
- reorienting the economy towards wellbeing and fair work; and

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<sup>15</sup> Scottish Government (2024), Programme for Government 2024-25: Serving Scotland.

<sup>16</sup> Scottish Government (2022), Scotland's National Strategy for Economic Transformation.



- creating a culture of delivery.

The strategy highlights Scotland's significant energy potential and its expanding green industrial base. Whilst these characteristics provide a strong foundation for securing new market opportunities arising from the transition to Net Zero, the strategy recognises the need for continued investment and support to maximise the benefits associated with these opportunities.

#### **4.3.4 National Planning Framework (NPF) 4**

The Fourth National Planning Framework (NPF4)<sup>17</sup> is Scotland's national spatial strategy, setting out the principles to be applied to planning decisions, regional priorities and national developments.

The first of six spatial principles to be applied is a just transition that ensures the transition to Net Zero is fair and inclusive, as is rural revitalisation, supporting sustainable development in rural areas. Applying these and other principles is intended to support the planning and delivery of sustainable places, where emissions reduce, and biodiversity is restored and better connected.

As part of the Policy 11(a), all forms of renewable technologies will be supported. This is subject to the test outlined in Policy 11(c), which states that: "development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities".

Policy 11(e) also sets out a number of impacts that should be addressed during project design and mitigation. That list does not include tourism. Whilst not required by NPF4, Chapter 5 of this report considers whether there could be any implications for tourism since it is an important contributor to the local economy.

#### **4.3.5 Green Industrial Strategy**

The Green Industrial Strategy<sup>18</sup>, published by the Scottish Government in September 2024, aims to help Scotland realise the economic benefits of the global transition to Net Zero. The strategy highlights Scotland's strengths and opportunities during the transition and outlines six key enabling factors that the Scottish Government and partners will do to foster a positive environment for investment and growth. These include:

- supporting investment, ensuring an investment-friendly ecosystem;
- investing in strong research and development foundations;
- supporting the development of a skilled workforce;
- helping supply chain businesses to seize opportunities;
- delivering an agile planning and consenting system; and
- delivering required housing and enabling infrastructure.

<sup>17</sup> Scottish Government (2023), National Planning Framework 4.

<sup>18</sup> Scottish Government (2024), Green Industrial Strategy.



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The strategy provides a clear direction and focus, highlighting the importance of prioritising resources and investment. The strategy also emphasises the need for coordinated policies to create the right environment and working collaboratively with partners to maximise economic benefit from the opportunities created by the transition to Net Zero.

#### **4.3.6 Tourism Strategy: Scotland's Outlook 2030**

A collaborative network of industry experts created Scotland's Outlook 2030<sup>19</sup>, which is focused on creating a world-leading tourism sector in Scotland that is sustainable in the long-term.

The strategy is focused on four key priorities: people, places, businesses and experiences. The strategy recognises the effects on tourism of climate change, technological advancements, Brexit and changing consumer behaviour and highlights the need for collaboration between government, communities, and the public and private sectors.

There are six conditions that the strategy has highlighted as being crucial for success:

- using technological advancements and information to understand changes and trends in tourist behaviours;
- ensuring policies are in place that support the vision;
- enabling investment opportunities into Scotland's tourism market;
- improving transport and digital infrastructure;
- greater collaboration between businesses in the industry; and
- positioning Scotland as a great place to live and visit locally and globally.

A main commitment of the strategy is to address the effects of energy demand associated with tourism and make the sector commit fully to Scotland's ambition of becoming a net-zero society by 2045.

The Proposed Development will look to minimise any negative impact on tourism and recreation within the local area, which is assessed within this report.

## **4.4 Regional Strategic Context**

In addition to supporting the national objectives and economic strategies, the Proposed Development will also contribute to the economic aims of stakeholders within Fife, Angus, and Perth and Kinross.

### **4.4.1 Tay Cities Region Economic Strategy 2019-2039**

In 2017, Angus Council, Dundee City Council, Perth and Kinross Council, and Fife Council, published the Tay Cities Region Economy Strategy 2019-2039<sup>20</sup>, setting out a long-term plan for East Central Scotland. The strategy highlights the socio-

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<sup>19</sup> Scottish Tourism Alliance (2020), Scotland Outlook 2030.

<sup>20</sup> Tay Cities (2019), Tay Cities Region Economic Strategy 2019-2039.





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economic challenges facing the region, and the opportunities associated with the growth of the energy sector.

Recognising that the region faces challenges around high unemployment and low wages, the overarching ambition of the strategy is to increase the number of businesses and create higher-paying jobs across the Tay Cities Region. An important aspect of achieving this ambition is to support investment in key infrastructure, helping to generate long term sustainable jobs in advanced manufacturing and the growing industry of renewable energy. The Proposed Development will contribute to these objectives, by generating economic opportunities for the region and supporting well-paid jobs.

## 4.5 Corporate Strategic Context

Advanced under Ofgem's Accelerated Strategic Transmission Investment (ASTI) framework, SSEN Transmission's 'Pathway to 2030' programme will enhance electricity transmission infrastructure across northern Scotland by 2030, contributing to Scotland and the UK's Net Zero ambitions.

### 4.5.1 Accelerated Strategic Transmission Investment (ASTI) Framework

In 2022, Ofgem introduced a new regulatory framework, Accelerated Strategic Transmission Investment (ASTI), to streamline the regulatory process for Transmission Owners, such as SSEN Transmission, to support the accelerated delivery of transmission projects.

The ASTI framework provides a new process with a reduced number of regulatory assessment stages for Transmission Owners and earlier access to funding to support the delivery of necessary onshore transmission projects required to meet the UK Government's 2030 renewable electricity generation ambitions.

Ofgem has identified an initial list of projects to be progressed under the ASTI framework, including SSEN Transmission's Pathway to 2030 Programme<sup>21</sup>.

### 4.5.2 Pathway to 2030 Programme

SSEN is investing over £20 billion, under their Pathway to 2030 programme, to contribute to the delivery of several projects designed to develop and upgrade overhead lines, substations, and subsea links, to meet the 2030 offshore wind connection dates.

The East Coast 400kV Phase 2 Projects, of which the Proposed Development is a part of, is among the projects under the Pathway to 2030 programme and will contribute to the delivery of Scotland and the UK's Net Zero targets for 2030.

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<sup>21</sup> SSEN (2024), Pathway to 2030 Programme (<https://www.ssen-transmission.co.uk/projects/2030-projects/>).



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### 4.5.3 Community Wealth Building (CWB)

CWB is an internationally recognised approach designed to keep wealth circulating locally to ensure more inclusive, resilient, and sustainable local economic development. Acting as a framework for activity, CWB is based on five interlinked pillars:<sup>22</sup>:

- plural ownership of the economy;
- ensuring financial power works for local places;
- fair employment and just labour markets;
- progressive procurement of goods and services; and
- socially productive use of land and property.

SSEN is committed to investing in the energy transition in a way which contributes to society by adding value, supporting jobs and maximises net economic benefits in the areas in which it operates. To embed this framework, SSEN is in the process of publishing a 'Statement of Intent' that incorporates initiatives aligned with the five pillars of CWB, demonstrating a commitment to fostering resilient local economies, reducing inequality, and promoting sustainable development.

## 4.6 Conclusions on Impact in Context

The Proposed Development represents critical investment in Scotland's grid infrastructure, facilitating the transmission of clean energy and contributing to delivering SSEN's corporate strategy, Pathway to 2030. In this way, the Proposed Development aligns with Scotland's national energy strategy and the UK's Net Zero agenda.

At a regional level, the Proposed Development could help to address key strategic priorities for Fife, Angus, and Perth and Kinross, by creating high-quality employment opportunities, diversifying the region's economic base and generating spend in the local economy. Key stakeholders emphasise the need for such opportunities to address challenges in the region, including an ageing and declining population.

To maximise economic benefits and ensure long-lasting wealth within local communities, SSEN could contribute to CWB, under their statement of intent, through initiatives such as prioritising local procurement, investing in skill development and increasing the contracts awarded to businesses within the regional and Scottish economies.

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<sup>22</sup> See Centre for Local Economic Strategies - <https://cles.org.uk/community-wealth-building/how-to-build-community-wealth/>



# 5.

## Tourism Assessment

The impact of the Proposed Development on tourism and recreation has been assessed as negligible.

### 5.1 Local Tourism Context

#### 5.1.1 Sustainable Tourism GVA and Employment

In its 2015 economic strategy<sup>23</sup>, the Scottish Government identified sustainable tourism as one of six key growth sectors where Scotland has a comparative advantage.

In 2021, the sustainable tourism sector across Fife, Angus, and Perth and Kinross, was estimated to generate £350.6 million GVA, accounting for 10.4% of Scotland's total tourism sector value (£3.4 billion GVA).

**Table 5-1: Sustainable Tourism: Employment and GVA, 2021**

	Combined Fife, Angus, and Perth and Kinross	Scotland
GVA (£m)	350.6	3,365.8
Employment	22,000	209,000

Source: Scottish Government (2023), Growth Sector Database.

#### 5.1.2 Visitors

While specific data on visitor numbers and spending in Angus is unavailable, information for Fife and the combined areas of Angus and Dundee, and Perth and Kinross, provide context of the tourism economy surrounding the Proposed Development.

In 2023, the regions of Fife, Angus and Dundee, and Perth and Kinross, attracted 1.5 million domestic overnight visitors, who spent an average of £250 per visit, amounting to £380 million. This accounted for 12% of the total spend in Scotland from domestic overnight visits in 2023.

As illustrated in Table 5-2, the combined region also drew approximately 366,000 international visitors, contributing £320 million in spending, accounting for 9% of all international visits to Scotland.

<sup>23</sup> Scottish Government (2015), Scotland's Economic Strategy.



**Table 5-2: Visits and Visitor Spending, 2023**

	<b>Combined Fife, Angus and Dundee, and Perth and Kinross</b>	<b>Scotland</b>
<b>Visitor Numbers (million)</b>		
Domestic Overnight Visitors	1.5	12.4
International Overnight Visitors	0.4	4.0
<b>Spend (£ million)</b>		
Domestic Overnight Visitors	380	3,189
International Overnight Visitors	320	3,593

Source: Kantar (2024), Great Britain Survey 2022/2023. Kantar (2023), Great Britain Day Visitor Survey. International Passenger Survey (2023), Great Britain Tourism Survey, 2023.

### **5.1.3 Regional Attractions**

The most visited attractions in Fife, Dundee and Angus, and Perth and Kinross, are shown in Table 5-3. Of these attractions, eight are located within 15 km of the Proposed Development.



**Table 5-3: Top Attractions in Fife, Dundee and Angus, and Perth and Kinross**

Attraction	Annual Visitors	Distance to Site (km)
Camperdown Wildlife Centre	80,740	5
Verdant Works	20,510	7
V&A Dundee	621,123	8
Discovery Point	86,141	8
Dundee Science Centre	69,955	8
Scone Palace	121,698	10
Scottish Deer Centre	70,281	11
Tentsmuir Forest	121,068	15
Lochore Meadows Country Park	649,000	18
Provost Walk	154,101	24
St Andrews Castle	88,814	24
St Andrews Cathedral	54,511	24
Hermitage	173,288	28
SSE Pitlochry Dam Visitor Centre	151,852	44
Tay Forest Park	279,349	62

Source: Visit Scotland (2021), Insight Department: Dundee and Angus Factsheet 2019. Visit Scotland (2021), Insight Department: Perth and Kinross Factsheet 2019. Visit Scotland (2021), Insight Department: Fife Factsheet 2019.

Another key driver of tourism in the Local Area is Glamis Castle, a site located approximately 10km from the Proposed Development, in the heart of Angus. As listed by Trip Advisor (2024) as a must-see sight in Angus, the Castle is renowned for its rich history and is an important tourism asset to the region.

## 5.2 Local Tourism Assets

Given that the Proposed Development is an upgrade of the existing development, there are limited changes expected to the landscape; therefore, the impact of the Proposed Development is less significant than may otherwise have been expected. Additionally, potential impacts on local tourism assets during the construction phase have also been considered, recognising that temporary disruption may occur as a result of construction activities. These construction phase impacts have been thoroughly assessed in the Environmental Impact Assessment Report (EIAR) across all relevant chapters.

Tourism is an important contributor to the regional economy, and therefore this report considers all tourism assets located within 15km of the Proposed Development. This includes:



- local tourist attractions;
- local accommodation providers; and
- recreational trails and core paths.

### **5.2.1 Local Tourist Attractions**

Through online research on the Visit Scotland portal and Google Maps, approximately 133 visitor attractions within 15km from the Proposed Development were identified. These are set out in Appendix B: Local Tourist Attractions, alongside their distance from the Proposed Development.

Approximately one-third of these visitor attractions are in Dundee City (4-10km from the site), of which there are a large variety of attractions, many of which are indoors. These attractions include theatres, museums and galleries, as well as facilities offering experiences such as rock climbing, go karting and trampolining. Among these, the V&A Dundee, Discovery Point, and Dundee Science Centre are relatively popular in the area.

Several local attractions were also identified along the coast from Dundee City towards Carnoustie. Attractions of this kind are largely associated with the coastal landscape, including beaches, and outdoor activities including several golf courses.

Outwith Dundee City, clusters of local attractions can be found in nearby areas, including Alyth (3-6km from the site) and Perth (4-8km from the site), with others further away located in Newport-on-Tay across the River Tay and Rattray (10-12km from the site), Kirriemuir (11-14km from the site) and Forfar (14-15km from the site). The main sources of tourism in these areas include castles, country parks, distilleries, fisheries, fruit picking and golf clubs.

### **5.2.2 Local Accommodation Providers**

Through online research on the VisitScotland portal and Google Maps, 251 accommodation providers were identified in the area surrounding the Proposed Development.

Self-catering providers, accounting for 55% of all accommodation identified within 15km of the Proposed Development, have a widespread presence in both rural settlements and the cities of Dundee and Perth. There is an even spread of self-catering accommodation around Angus and Fife with some groups concentrated around the Lomond Hills Regional Park.

Approximately half of all hotels identified within 15km of the Proposed Development are spread in the city centre of Dundee, Glenrothes and Perth. The remainder can be found in more rural locations, including Blairgowrie and Rattray, Alyth and Kirriemuir.

Although some B&Bs can be found in Dundee City, the vast majority are located more rurally, particularly clustered in Blairgowrie and Rattray, Alyth, around Loch Leven, Kirriemuir, and Forfar. Similarly, given their nature, holiday parks are predominantly located in rural areas, with some clustering along the coast towards Broughty Ferry and outside the centre of Perth.



**Table 5-4: Local Accommodation Providers**

Type of Accommodation Provider	Total
Self-Catering	137
B&Bs	27
Hotels	61
Holiday Parks / Hostels	26
<b>Total</b>	<b>251</b>

Source: Visit Scotland (2024), Accommodation Fife, Dundee and Angus, and Perth and Kinross. Google Maps.

### 5.2.3 Recreational Trails and Core Paths

Several trails were identified on Walkhighlands (2024) within 15km of the Proposed Development. These are shown in Table 5-5, alongside a brief description and their distance from the site.

Given the topography surrounding the Proposed Development is characterised by its relatively hilly landscape, several of the recreational trails are designed for hill walking and hiking. In addition to these hill walks, several other trails follow the Tay estuary in Fife and the coastline between Dundee and Arbroath.

Notably, there are also several walking routes in and around the city of Perth, historic Falkland and around Loch Leven. A few trails summit local hills and mountains to present views over the natural landscape. The remaining trails feature local attractions, country parks and alongside rivers.

**Table 5-5: Recreational Trails**

	Description	Distance to Site (km)
Sidlaws: Craigowl and Auchterhouse hill	7.5km trail summitting three Sidlaw hills.	<1
Abernethy Glen	4.5km clear path climbing the ancient tower in Abernethy with a circular route around the local glen.	<1
Auchtermuchty Common circuit, Auchtermuchty	7km circuit with views across to the Lomond Hills.	<1
Moncreiffe Hill near Perth	8km woodland circular path summitting Moncreiffe Hill with views over Perth.	2
Lundie Craigs circuit, Sidlaws	8km hill walk summitting Lundie Craig.	3
Kinpurney Hill and Monument, Newtyle	5.5km walk following a stream before summitting Kinpurney Hill.	4



Camperdown, Templeton & Clatto, Dundee	9.5km around the country park, Camperdown.	5
Fife Coastal Path 11: Newport-on-Tay to Newburgh	Final section of the Fife Coastal Path, a 183km route linking from the Forth to the Tay.	5
Lindores Loch circuit, Grange of Lindores	6km circuit around Lindores Loch through farmland.	5
Scone Circular, Scone near Perth	9km circular walk ascending two hilltop monuments - Macduff's folly and the Lynedoch Obelisk.	5
Tyndall Bruce Monument and Falkland Estate	6km woodland walk climbing to the Tyndall Bruce Monument and returning through the woods past the Witches' Cave.	5
Kinnoull Hill and Tower, Perth	6.5km woodland circular path through Kinnoull Hill.	5
Perth City walk	7km city walk through Perth.	6
Maspie Den, Falkland	4.75km loop from Falkland village through woodland paths.	6
East Lomond circuit, Falkland	7km loop through hillpaths through historic Falkland and views over summit.	6
Tay Bridge & Balmerino, from Wormit	8.5km circular route along the Tay Estuary.	6
Balmerino and Thornton circuit	5.25km woodland walk overlooking the Firth of Tay and passing the ruins of Balmerino Abbey.	6
Dunsinane and King's Seat, Collace	6.5km hill walk summiting Dunsinane and King's Seat.	6
Dundee Law from Discovery Point	5.25km route summiting Dundee Law.	7
River Tay: Perth to Luncarty	10km flat riverside path from the banks of River Tay in Perth city centre to Luncarty in the north.	7
Norman's Law, from Luthrie	8.25km summit track to Norman's Law in the Ochils range with views.	8
Monikie Country Park, near Carnoustie	3.25km circuit around Monikie Country Park and reservoirs.	9
Angus Coast: Broughty Ferry to Carnoustie	13km coastline walk from Broughty Ferry to Carnoustie.	10





Crombie Country Park, near Carnoustie	4.25 km trail around woodland in Crombie Country Park.	11
Mount Hill and the Hopetoun Monument, Cupar	12.5km path to the summit of Mount Hill.	11
Balmashanner Hill, Forfar	4km hill walk sumitting Balmashanner Hill.	12
Forfar Loch circuit, Forfar	4km circuit around Forfar Loch, with opportunity to see birdlife.	12
Loch Leven Heritage Trail, Kinross	19.25km level path around the Loch Leven National Nature Reserve.	12
Kinross and Loch Leven	6.25km accessible circuit from Loch Leven shores with option of ferry to the Castle and returning through Kinross.	12
Hill of Alyth, Alyth	6.km circular walk sumitting both the Hill of Loyal and the Hill of Alyth.	14
Carnoustie Links, Carnoustie	6.5km coastal trail.	14
Kirkton of Glenisla to Alyth	17km section of the Cateran Trail, passing between the Alyth hills.	14
Den of Alyth, Alyth	3.5km trail through woodland.	14
Kirriemuir Explorer	4.75km trail around the town of Kirriemuir.	15
Tullyfergus circuit, near Blairgowrie	7.km circular walk through forestry.	15
Hill of Tarvit and Scotstarvit from Ceres	10.25km walk from Ceres to National Trust mansion house with viewpoint.	15
Alyth to Blairgowrie	26.25km section of the Cateran Trail, over the hills north of Alyth.	15
Craighall Den circular, Ceres	4km walk from the historic village of Ceres heads to the Craighall Den on waymarked paths.	15

Source: Walkhighlands (2024).

There were also 840 core paths<sup>24</sup> identified within 15 km of the Proposed Development, across Angus, Dundee City, Perth and Kinross and Fife.

<sup>24</sup> Scottish Government Spatial Data (2024). Core Paths - Scotland



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## 5.3 Impact on Recreation and Tourism

The assessment considers whether the Proposed Development would affect any of the tourism assets identified, accounting for any significant effects identified in the following chapters:

- Airborne Noise and Vibration;
- Traffic and Transport; and
- Landscape and Visual Assessment.

### 5.3.1 Local Attractions

As outlined in the baseline assessment, there is a diverse range of attractions within 15 km of the Proposed Development, encompassing both the cities of Dundee and Perth as well as their surrounding rural areas.

The motivation to visit the identified city-centre attractions, many of which are indoor activities such as go-karting and trampolining, is likely driven by the specific experiences they offer. Other attractions including museums, galleries, and historical landmarks, are expected to appeal to those with an interest in history and culture. Therefore, the Proposed Development is not anticipated to affect the motivation to visit these attractions.

Beyond Dundee City and Perth, the primary attractions driving tourism include distilleries, castles, country parks, and golf clubs. Tourists are typically drawn to explore these attractions due to the activities they offer or their connection to Scottish history and culture. Given the distinct nature and geographical spread of these attractions, the Proposed Development is not expected to impact the motivation to visit these sites.

The assessment of tourism impacts on local tourist attractions was carried out in consideration of the assessment of impacts as outlined in the abovementioned chapters. There were no significant effects on local attractions identified.

### 5.3.2 Local Accommodation Providers

There are a variety of accommodation providers within 15 km of the Proposed Development, including self-catering, B&Bs, hotels, holiday parks and hostels, located in both Dundee city, Perth and its surrounding rural areas.

For accommodation providers located in Dundee City, the primary motivation for guests to choose these providers is their desire to stay within the city itself and to be nearby key attractions, such as the V&A, which welcomes over 600,000 annual visitors. As a result, the Proposed Development is not expected to affect the motivations to visit these accommodation providers.

The rural areas surrounding Dundee offer a variety of accommodation options that cater to diverse visitor preferences, providing an ideal base for tourists to explore the region's attractions. The motivation to visit these accommodation providers is likely



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to be associated with nearby attractions and is not expected to be impacted by the Proposed Development.

The assessment of tourism impacts on accommodation providers was carried out in consideration of the assessment of impacts as outlined in the abovementioned chapters. There were no significant effects on local attractions identified.

### **5.3.3 Recreational Trails and Core Paths**

Several recreation trails within 15km of the Proposed Development were identified, many of which were designed for hill walking and hiking, whilst others followed the coastline and the river in Perth.

Given that the Proposed Development is an upgrade of the existing development and there are limited changes expected to the landscape, the impact on the identified recreational trails will be negligible since it can be assumed that any impacts which may occur due to the presence of the Proposed Development, would already have been realised due to the existing development.

The temporary construction work activities are not expected to affect visitors' motivation to use the recreational trails, as many are drawn by activities such as hill walking, hiking, and following the coastline or the river in Perth. Therefore, it is unlikely to deter visitors. For longer trails, where only brief sections are affected, the construction works are also not expected to influence overall trail use. Therefore, the impact of construction on the use of these trails has been assessed as negligible.

The core paths identified tend to be used by local residents or are part of the recreational trails described above. As a result, the Proposed Development is unlikely to have an impact on activity along them.

The assessment of tourism impacts on recreational trails and core paths was carried out in consideration of the assessment of impacts as outlined in the abovementioned chapters.

## **5.4 Summary of Local Tourism Impact**

Given that a large proportion of tourism assets are located in Dundee itself, the motivation for visitors is likely to be associated with the city itself and key attractions in the region. Beyond Dundee City, visitors are typically motivated to visit these areas due to their connection to Scottish history and culture or to engage in outdoor activities. As a result, the Proposed Development is not expected to affect the motivations to visit the identified tourism assets.

Accounting for any significant effects identified in the Airborne Noise and Vibration, Traffic and Transport, and Landscape and Visual Assessment chapters, the impact on recreational amenities has been assessed as negligible since it can be assumed that any potential impacts resulting from the Proposed Development would already have been realised due to the existing development.



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## 6.

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# Appendix A: Methodology

An Input-Output economic model was developed to estimate the economic impact of the Proposed Development.

## 6.1 Metrics of Assessment and Study Areas

The following of economic impact have been considered:

- **Gross Value Added (GVA):** a measure of economic activity expressed as the difference between an organisation's turnover and its non-staff operational expenditure; and
- **Years of Employment:** a measure of employment used in the context of jobs associated with construction activity and lasting over a short period of time, or to express cumulative employment impacts over a project's lifespan.

The economic impacts have been presented at the regional, Scottish, and the UK level.

## 6.2 Types of Impact

There are three types of economic impact associated with development and construction of the Proposed Development:

- **Direct impact:** this is the direct impact associated with Tier 1 suppliers, including from employing and paying staff, and generating profits. The direct impact is estimated by dividing the expenditure on a contract by the turnover/GVA and turnover/employee ratios for the relevant sectors to estimate the direct GVA and employment impacts;
- **Indirect impact:** this is the impact associated with spending in the supply chain of Tier 1 suppliers. This is captured by applying Type 1 economic multipliers to the direct economic impacts; and
- **Induced impact:** this is the impact associated with staff spending their wages in the wider economy and is captured by subtracting Type 1 multipliers from Type 2 multipliers and applying this to the direct impact.

## 6.3 Methodology

### 6.3.1 Approach to Modelling Economic Impacts

The approach followed throughout the economic impact assessment is shown in the figure below. The analysis involved estimating levels of expenditure by contract and study area, and then considering GVA and employment impacts (including indirect and induced effects).



The economic analysis is based on high-level cost estimates provided by SSEN, and where necessary, detailed assumptions were made regarding how this expenditure might be distributed across different categories. For each category, assumptions were made about the proportion of contracts that could be secured in each area, along with the relevant sectors for each contract. These estimates were informed by SSEN's experience with similar projects and BiGGAR Economics' understanding of UK supply chains and expertise in the sector.

**Figure 6-1: Economic Impact Methodology**





## 6.4 Economic Impact Modelling

The first step in conducting the economic analysis was to make assumptions regarding the capacity of businesses to secure contracts and to assign each contract to the appropriate Standard Industrial Classification (SIC) sector. This allowed for the calculation of the direct GVA, and direct years of employment supported by the Proposed Development. These estimates were derived by applying sector specific turnover per job and turnover per GVA ratios from the UK Annual Business Survey<sup>25</sup>, as illustrated in the figure below.

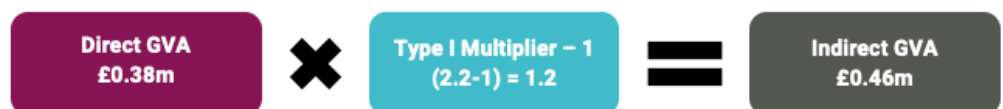
**Figure 6-2: Direct GVA Calculation**



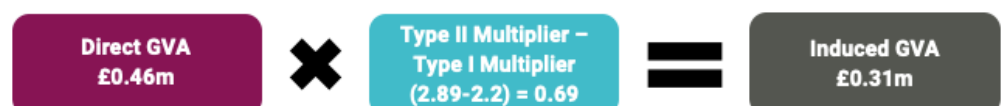
The economic activity generated by the Proposed Development extends beyond the direct contributions of awarded contracts to the turnover of recipient businesses. Contract-related spending also stimulates activity within the supply chain of businesses involved in the development and construction phases (indirect impacts). Furthermore, employees working on the Proposed Development contribute to the economy through their personal spending (induced impacts).

Indirect impacts were estimated by applying Type 1 GVA and employment multipliers, as sourced from UK Input Output Tables<sup>26</sup> to the direct GVA and employment supported by development and construction contracts. Similarly, induced impacts were estimated by applying Type 1 and Type 2 GVA and employment multipliers to the direct GVA and employment supported. This is demonstrated in the figures below.

**Figure 6-3: Indirect GVA Calculation**



**Figure 6-4: Induced GVA Calculation**



<sup>25</sup> UK Government (2024), UK Annual Business Survey 2022.

<sup>26</sup> ONS (2024), UK Input-Output Supply and Use Tables 2022.



The total economic impact associated with the Proposed Development is calculated by the sum of direct, indirect and induced impact, as demonstrated in the figure below.

**Figure 6-5: Total GVA**





# 7.

## Appendix B: Local Tourist Attractions

Table 7-1: Local Tourist Attractions

Attraction	Distance to Site (km)
Salmon Fishing Holidays Scotland	<1
Museum of Abernethy	<1
Go Golf @ Middlebank Driving Range	<1
Glendoick	<1
Glendoick Garden Centre	<1
Errol Showground	<1
Jamesfield Farm Shop & Restaurant	1
Auchterhouse Country Sports	1
Ledyatt Loch Trout Fishery	2
Piperdam Golf Course	2
Elcho Castle	2
Rait Antiques Centre	2
Grewar's Farm Shop	2
Scottish Antique & Arts Centre, and Restaurant	3
Ledcrieff Loch Trout Fishery	4
Salmo Fly Fishing Scotland	4
Laser Combat Dundee (FKA Combat City Dundee)	4
Willowgate Activity Centre	4
Lower Laing Museum	4
TeamSport Go Karting Dundee (formerly ScotKart)	4
Camperdown Wildlife Centre	4
Ryze Dundee - Xtreme Air Sports	4
Caird Park Golf Club	4
Lindores Abbey Distillery	5
Kinnoull Hill Woodland Park	5
Backhouse Rossie Estate	5
Balvaird Castle	5
Ballinbreich Castle	5





Ballumbie Castle Golf Club	5
DISC: Dundee International Sports Centre	5
Newton Farm Holidays & Tours	6
Ancrum Outdoor Centre	6
Dundee Law	6
The Fun Factory	6
Camperdown Country Park	6
King James VI Golf Club	6
Branklyn Garden	6
Murrayshall Golf Course	6
Indian Cook School by Praveen Kumar	6
Celtic Caterham Hire	6
Baxter Park	6
MòR Beers	6
Dundee Community Craft	6
7ecosse	7
Birkhill Castle	7
Perth Concert Hall	7
The Fair Maid's House Visitor Centre	7
Balmerino Abbey	7
Highfield Equestrian at Howe	7
The Black Watch Castle & Museum	7
Perth Art Gallery	7
Perth Theatre	7
Perth Leisure Pool	7
Dewars Centre	7
Gallery Q Dundee	7
V&A Dundee	7
Discovery Point and RRS Discovery	7
Discovery Walk Historical Walk	7
Verdant Works Museum	7
Caird Hall	7
Dundee Ice Arena	7
Wild Shore Dundee	7
The McManus: Dundee's Art Gallery & Museum	7



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Dundee Museum of Transport	7
Mills Observatory	7
St. Mary's Tower	7
HMS Unicorn	7
The McManus Collections Unit	7
Whitehall Theatre	7
Dundee Contemporary Arts	7
Olympia	7
Dawson Park	7
Carphin House	8
Glen Vale Waterfalls	8
Dundee Science Centre	8
D'Arcy Thompson Zoology Museum - University of Dundee	8
Paddle Active	8
Meigle Museum	8
Gin Bothy Experience	8
Paddle Active	8
Affleck Castle	8
Ladybank Golf Club	9
Scone Palace	9
Glamis Castle	9
Broughty Ferry Beach	9
SaltDog Marine	9
Glamis Castle	9
Wormit Trout Fishery	10
Barnhill Rock Garden	10
Broughty Castle Museum	10
Wormit Trout Fishery	10
Ashludie Golf Course Starter Hut	10
Huntingtower Castle	10
Monikie Country Park	10
Perth Racecourse	10
Castle Brae	10
Forgan Arts Centre	11



Monifieth Golf Club	11
Angus Alchemy	11
Strathmore Golf Centre	11
Scotsraig Golf Club	11
TATHA Gallery	11
Grange & Broughty Golf Club	11
The Scottish Deer Centre	11
Monifieth Golf Links	12
Crombie Country Park	12
Balbirnie Stone Circle	12
Drumoig Golf Course	13
Alyth Golf Club	13
Glenisla Golf Course	13
Barry Mill	13
Clare O'Neill Textiles	13
Elmwood Golf	13
Lordscairnie Castle	13
Cairnie Fruit Farm & Mega Maze	13
Forfar Meffan Museum	13
Blairgowrie Tennis Club	14
Raspberry Fields Exclusive	14
Strathmore Woollen Co.	14
Pathhead Farm Dog Park	14
Kirriemuir Gateway to the Glens Museum	14
Alyth Museum	14
Alyth Den	14
Panmure Golf Club	14
Carnoustie Golf Links	15
Camera Obscura	15
J M Barrie's Birthplace	15
The Carnoustie Burnside Course	15
The Blairgowrie Golf Club	15
Kirriemuir Golf Club	15
Forfar Golf Club	15
Tentsmuir National Nature Reserve	15



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Carnoustie Beach	15
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Source: Google Maps (2024). Visit Scotland (2024).

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