Environmental Impact Assessment Report

Teindland Wind Farm

Volume 1

Chapter 14: Socio-economics, Tourism, Recreation and Land Use

Document prepared by Envams Ltd for: Teindland Wind Farm Ltd

April 2025

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14 SOCIO-ECONOMICS, TOURISM, RECREATION AND LAND USE

14.1 INTRODUCTION

This chapter of the Environmental Impact Assessment Report (EIAR) evaluates the effects of the proposed Teindland Wind Farm (the Development) on land owned by Forestry and Land Scotland approximately 3 km north of Rothes, Moray, (the Site) on socio-economic, tourism, recreation and land use resources.

This Chapter is supported by the following figure in Volume 2a of this EIAR:

- Figure 14.1: Core Paths and Recreational Routes.

This assessment was carried out by Paul Phillips, one of the directors of Envams Ltd, an environmental and planning consultancy specialising in renewable energy development in the UK. Paul is an IEMA Registered Environmental Impact Assessment Practitioner with over 20 years experience in Environmental Impact Assessment, the large majority of which he has spent working on renewable energy developments.

14.2 CONSULTATION

Consultation relevant to this chapter is summarised in Table 14.1.

Table 14.1 Consultation Responses

Consultee	Type and Date	Summary of Consultation Response	Response to Consultee
Moray Council	Scoping Response 23rd August 2022	Detailed assessment of impact should also include consideration of the extent to which the proposal contributes to renewable energy generation targets, its effects on greenhouse gas emissions and net economic impact, including socio-economic benefits such as employment.	Section 4.5.1 of this Chapter assesses the socio-economic benefits of the Development. This includes benefits on employment, community benefits, and induced effects.

14.3 LEGISLATION, POLICY, AND GUIDANCE

14.3.1 Legislation

There is no specific legislation, policy or guidance available on the methods that should be used to assess the socio-economic effects of a proposed onshore wind farm development as part of an EIA.

14.3.2 National Policy

14.3.2.1 National Planning Framework 4 (NPF4)

NPF4 was most recently amended in October 2024[1]. The purpose of NPF4 is to manage land-use and development in the long-term public interest and includes all aspects of national planning policy as per the provisions of the Planning (Scotland) Act 2019, passed by the Scottish Parliament in June 2019.

Policy 11 of the NPF4 relates to energy and has the specific intent to encourage, promote and facilitate all forms of renewable energy development. Policy 11c is specifically relevant to socio-economic impacts, in that it states:

[1] Scottish Government (2023) *National Planning Framework 4 (NPF4)*. Available at: https://www.gov.scot/publications/national-planning-framework-4/pages/1/ [Accessed 24/09/2024].

"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".

NPF4 contains a regional focus including the *"North East"* and has three key priorities, these being:

- *"Plan infrastructure and investment to support the transition from oil and gas to net zero whilst protecting and enhancing blue and green infrastructure and decarbonising connectivity.*
- *Focus on continued regeneration through the principles of local living and 20 minute neighbourhoods to sustain the skilled workforce and improve local liveability.*
- *Support continued economic diversification and innovation."*

NPF4 is clear in its desire to rebalance the North East 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.

14.4 ASSESSMENT METHODOLOGY AND SIGNIFICANCE CRITERIA

14.4.1 Scope of Assessment

This chapter considers:

- The effects of the Development on socio-economic factors at a local, regional and national scale;
- The effects on land use for areas within the Site; and
- The effects on local tourism and recreational facilities within 5 km of the Site.

14.4.1.1 Socio-Economics

The socio-economic assessment criteria relate to the employment effects within the Study Area, as defined in Section 14.4.2. These effects are defined in terms of job-years generated by the Development and capital expenditure.

14.4.1.2 Land Use

Land use is the anthropogenic modification and management of the natural environment into what the land is currently used for, and the future uses of the land. Developments have the potential to affect the ability of the land to be used for its current use and affect the ability of the land to be used effectively for future uses.

14.4.1.3 Tourism and Recreation

Tourism and recreational activities may be affected by a development due to changes in the setting and context of the recreational asset; loss, closure or diversion of routes; obstruction, or enhancement of routes; and the reduction or enhancement of amenity.

14.4.2 Study Area

14.4.2.1 Socio-Economics

In this report, socio-economic study areas are defined at a local, regional, or national scale:

- Local area: the Speyside Glenlivet Electoral Ward;
- Regional area: the Moray Council Area; and
- National area: Scotland.

14.4.2.2 Land Use

The land use study area comprises land within the Site and taken by the Development, either temporarily during construction and decommissioning or permanently after operation and decommissioning.

14.4.2.3 Tourism and Recreation

The tourism and recreation study area includes assets within 5 km of the Site.

14.4.2.4 Cumulative Effects

Cumulative effects related to socio-economics, land use, recreation and tourism are assessed in the context of other developments within 10 km of the Site. Cumulative effects in this context are generally related to visibility of multiple schemes, or effects such as multiple developments being constructed within proximity to one another. The landscape and visual impact assessment (chapter 5) does not identify any likely significant effects at distances beyond 5 km from the Site. 10 km is therefore considered to be the conceivable maximum distance that cumulative effects may occur.

14.4.3 Assessment Methodology

14.4.3.1 Sensitivity of Receptors

The sensitivity of the baseline conditions has been assessed using the best practice guidance, legislation, statutory designations, and professional judgement. This assessment includes the sensitivity of potentially affected receptors, as well as the importance of environmental features in close to proximity to the Site.

The framework for determining the sensitivity of receptors is shown in Table 14.2.

Table 14.2: Framework for Determining the Sensitivity of Receptors

Sensitivity of Receptor	Definition
Very High	The socio-economic, land use, recreational or tourism value of the asset is very high and holds importance at UK or International level. The asset has no, or very little capacity to absorb change of any nature, without significantly affecting its present character. For example, it is an asset that has a substantial number of visitors on an international or national level (UK) and possesses priority in national policy.
High	The socio-economic, land use, recreational or tourism value of the asset is high, and holds importance to Scotland. The asset has little capacity to absorb change, without significantly affecting its present character. For example, it is an asset that significantly contributes to the national economy and possesses weight in regional policy.
Medium	This asset holds some socio-economic, land use, recreational or tourism value, and holds regional importance (Moray). The asset has some capacity to absorb change, without significantly affecting its present character. For example, it is a popular asset among current visitors, it significantly contributes to the regional economy, and it possesses some weight in regional or local policy.
Low	The socio-economic, land use, recreational or tourism value of the asset is low, and holds local importance (Speyside Glenlivet). The asset is tolerant and has capacity to absorb change, without significantly affecting its present character. For example, it is an asset for some few current visitors.
Negligible	The socio-economic, land use, recreational or tourism value of the asset is insignificant. The asset is resistant to change. For example, it is an asset with low numbers of current visitors and holds no weight in authority policy.

14.4.3.2 Magnitude of Change

The magnitude of change will be assessed through consideration of the Development, the expected degree of change to the baseline conditions because of the Development, the duration and the reversibility of the changes, and best practice guidance and legislation. Table 14.3 shows the criteria for assessing the magnitude of change.

Table 14.3: Framework for Determining the Magnitude of Change

Magnitude of Change	Definition
High	Complete loss or significant alteration (positive or negative) of the socio-economic, land use, recreation or tourism assets.
Medium	Loss or alteration (positive or negative) of the socio-economic, land use, recreation or tourism assets.
Low	Minor alteration (positive or negative) of the socio-economic, land use, recreation or tourism assets.
Negligible	Insignificant alteration(positive or negative) of the socio-economic, land use, recreation or tourism assets.

14.4.3.3 Significance of Effect

The significance of the likely effects will be predicted using the magnitude of change and the sensitivity of the receptor, in addition to professional judgement. The framework for the assessment of the significance of effects is shown in Table 14.4.

Table 14.4 Framework for the Assessment of the Significance of Effects

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

In the context of EIA regulations, effects that are predicted to be moderate or major are considered to be significant. These are highlighted in light grey in the table above.

Effects can be classified as positive, negative, or neutral and these are specified where possible within the assessment sector of this chapter.

When assessing the significance of possible effects, consideration is given to the local, regional and national baseline situation, with the magnitude of change determined in proportion to the relevant geographical scale.

For socio-economic factors, potential effects would be considered significant if the Development caused any fundamental population changes, changes in community structure, or changes in economic activity during the operational phase of the Development. In terms of tourism and recreational factors, effects would be significant if the Development caused any changes to key features of the receptor or if it resulted in any major effects to the baseline conditions of the attractions, recreational routes or accommodation.

Potential land-use effects would be considered significant if the Development resulted in the loss of an important land use receptor or long-term alterations.

14.4.3.4 Assessment Limitations

No surveys specific to the Development and in support of this assessment have been completed. Data used in this report has been collected from published sources. Baseline information has been taken from the latest available information and informed by consultation responses.

Efforts have been made to identify all relevant tourism and recreational activities within 5 km of the Site; however, it is acknowledged that a number of smaller attractions may not have been found through the data collection process.

14.5 BASELINE CONDITIONS

14.5.1 Socio-Economics

14.5.1.1 Population

Local Study Area

In 2021, the estimated population of Speyside Glenlivet was 9,096, with a female population of 4,566 (50.2%) and a male population of 4,530 (49.8%). In 2021, 15.1% (1,374) of the population were children under the age of 16, 59.7% (5,433) were of working age (16-64), and 25.2% (2289) of the population were aged 65 and over[2]. The percentage of the population of working age in Speyside Glenlivet is smaller than that of Scotland as a whole (64.9%) in 2020[3]. This could be an indicator suggesting that some of those of working age in the area have left in search of economic opportunities in other areas.

Regional Study Area

Moray is an area in the North East of Scotland, stretching from the coast of the Moray Firth in the north, to the Cairngorm Mountains in the south[4]. It is the 8th largest council area within Scotland, covering an area of 2,238 km^2 and, as of June 2022, has an estimated population of 94,280. Similarly to Scotland as a whole, in 2022, there was a greater female population (50.5%) than male population (49.5%) in Moray. In 2022, the most populous age group in Moray was the 45 to 64 group, with a population of 27,026. In contrast, the 16 to 24 age group made up the smallest percentage of the population (8,528)[5]. Similarly to Speyside Glenlivet, Moray has a smaller proportion of the population of a working age when compared to Scotland, with 61.2% in this category in 2020, 3.7% less than Scotland.

The National Records of Scotland projections suggest that the population of Moray is expected to decrease by 0.1% from 2018 to 2028, down to 95,409. The age group expected to see the greatest population decrease is the 0 to 15 range, with a 14.1% reduction in size. On the other hand, the 75+ age range is expected to increase by 32.4%. Despite a potential 7.6% population decrease, the 45 to 64 age group will remain the largest, with an estimated population size of 25,444 in 2028. The projected population change by age group largely mirrors that of Scotland as a whole, with the 65+ age groups expecting to see significant increases, and younger age groups seeing slight reductions in size[6].

The main settlement within Moray is Elgin, with an estimated population of 25,054 in 2020. The population of Elgin has grown by 31.6% since 1991[7].

National Study Area

The most recent census, in 2022, estimated Scotland's population to be 5,436,600. This is the largest population size recorded by Scotland's census, having grown by 141,000 (2.7%) since 2011. Within the population, 2,794,900 (51.4%) were female and 2,641,800 (48.6%) were male[8].

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[2] Scottish Government, Statistics (2021), [Online], available at https://statistics.gov.scot/atlas/resource?uri=http%3A%2F%2Fstatistics.gov.scot%2Fid%2Fstatistical-geography%2FS13003024 (Accessed 23/09/2024)

[3] Office for National Statistics (2021) Labour Market Profile - Scottish Borders, [Online], available at https://www.nomisweb.co.uk/reports/lmp/la/1946157430/report.aspx#tabempocc (Accessed 24/09/2024)

[4] Moray Council (2008) Area Profile, [Online], available at www.moray.gov.uk/downloads/file59352.pdf (Accessed 24/09/2024)

[5] National Records of Scotland (2022) Population Estimates Time Series Data, [Online], available at https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/population-estimates-time-series-data (Accessed 23/09/2024)

[6] National Records of Scotland (2018) Sub-National Population Projections , [Online], available at https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-projections/sub-national-population-projections (Accessed 23/09/2024)

[7] National Records of Scotland (2020) Mid-2020 Population Estimates for Settlements and Localities in Scotland, [Online], available at https://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/settlements-and-localities/mid-2020 (Accessed 23/09/2024)

[8] Scotland's Census 2022 - Rounded population estimates (2022) , [Online], available at https://www.scotlandscensus.gov.uk/2022-results/scotland-s-census-2022-rounded-population-estimates/ (Accessed 23/09/2024)

14.5.1.2 Employment

Local Study Area

Employment data on Speyside Glenlivet is very limited. Detailed statistics at this level are often not publicly available, making it challenging to provide precise figures.

Regional Study Area

As of December 2023, Moray's employment rate is less than that of Scotland as a whole, with 71.9% of people being in full time employment. Employment within Moray has also decreased when compared with previous years, with 76.6% of people in employment at the end of 2022[9].

The breakdown of employment by occupational between April 2023-March 2024 is:

- Managers, Directors and Senior Officials (8.2%);
- Professional Occupations (17.1%);
- Associate Professional Occupations (15.8%);
- Administrative & Secretarial (10.9%);
- Skilled Trades Occupations (10.7%);
- Caring, Leisure and Other Service Occupations (14.2%);
- Sales and Customer Service (5.5%);
- Process Plant & Machine Operatives (9.5%);
- Elementary Occupations (8.1%)[10].

In Scotland, the percentage of the population that was economically active between May 2024 and July 2024 was 77.7%, with the percentage of people in full-time employment standing at 74.2%. The breakdown of employment by occupation between April 2023-March 2024 is:

- Managers, Directors and Senior Officials (8.0%);
- Professional Occupations (26.4%);
- Associate Professional Occupations (16.1%);
- Administrative & Secretarial (9.5%);
- Skilled Trades Occupations (9.3%);
- Caring, Leisure and Other Service Occupations (9.0%);
- Sales and Customer Service (6.4%);
- Process Plant & Machine Operatives (5.5%); and
- Elementary Occupations (9.7%).

The most significant difference between the Moray occupational breakdown and the occupational breakdown of Scotland as a whole is the proportion of those in the Professional Occupation category, with Scotland having 26.4% of employees within this category, 9.3% greater than that of Moray. This difference is largely made up in the Process Plant & Machine Operatives and Caring, Leisure and Other Service Occupations categories, with Moray having a greater proportion of the workforce in these roles.

14.5.1.3 Moray Economic Strategy 2022-2032

In 2012 the Moray economic strategy was produces to provide a long term economic strategy for Moray. In November 2022, this strategy was refreshed to reflect the changes in the economic landscape since 2012. The strategy outlines 6 strategic outcomes to grow and diversify the economy of Moray over the 10 year period:

- Maximising the environmental, social and economic benefits of the transition to net zero and Community Wealth Building;
- A labour market that provides the required numbers of workers to take advantage of available opportunities-notably attraction and retention of those aged 16-29;
- Increased productivity leading to growing wages and contributing to closing the gender pay gap;
- Ensuring alignment between skills provision and the changing economy;

[9] Office for National Statistics (2023) Employment, unemployment and economic inactivity in Moray, [Online], available at https://www.ons.gov.uk/visualisations/labourmarketlocal/S12000020/ (Accessed 23/09/2024)
[10] Office for National Statistics (2023) Local authority profile, [Online], available at https://www.nomisweb.co.uk/reports/lmp/la/1946157424/report.aspx?town=moray#tabempocc (Accessed 24/09/2024)

- Increasing employment levels and number of companies; and
- Delivery of the Moray Growth Deal.

Moray Council looks to meet these objectives by increasing qualification levels across all genders and ages, growing small to medium sized businesses, improving talent attraction, retention and return, and increasing the competitiveness of businesses through an increase in capital investment[11].

14.5.1.4 Renewables and Economic Development

The renewable energy industry plays a significant role in Scotland's economy. The Office for National Statistics estimated that in 2022, renewable energy activity generated £13 billion in output and employed 25,700 people in Scotland[12]. The University of Strathclyde's Fraser of Allander Institute conducted a study looking into estimated indirect activity, finding that Scotland's renewable energy industry and its supply chain supported more than 42,000 jobs in 2021[13]. Scotland's renewable energy capacity has continued to grow since, reaching 15.3 GW in 2023[14].

14.5.2 Land Use

The Site comprises of active coniferous forestry plantation, including a network of tracks used to facilitate forestry operations, as well as providing recreational opportunities.

There are a number of named hilltops within the Site, including Hunt Hill (261 m AOD); Teindhall Hill (253 m AOD); and Hill of Orbliston (150 m AOD). There are a number of watercourses located within the Site, including Feith Burn, Burn of Garbity, Gawrie Burn; Sauchenbush; Whities Stripe and Henderson's Well; and Cushley Burn.

The land is owned and managed by the public body, Forest and Land Scotland, and is used for the production of coniferous forestry, including small areas of research plots and peatland management. There are well established tracks throughout the Site. These tracks not only facilitate the operation of the forestry works but are also used recreationally by the public for walking, horse-riding, and also (once per year) motor rallying in the Speyside Stages Rally.

14.5.3 Tourism

14.5.3.1 Tourism Strategies

Regional Strategy

Tourism in Moray is a strategic framework that has been developed to maximise the economic, social and cultural benefits of tourism in Moray. The strategy states that it considers tourism as underperforming industry in Moray, with visitors spending in the region of £85m-£90m annually. This is significantly less than regions such as Argyll (£330m-£335m) and Aberdeenshire (£300m). The strategy sets out its vision to be known nationally and internationally as a destination for leisure and business assets. By 2025, it aims to double the economic value of tourism, double the size of the tourism related workforce, and achieve annual occupancy of serviced rooms of at least 75%, and at least 65% occupancy of self-catering units[15].

National Strategy

Scotland Outlook 2030 is Scotland's national tourism strategy that looks to grow the value and positively enhance the benefits of tourism across the nation. The strategy was launched in 2020 through an equal partnership between Scottish Tourism Alliance, Scottish

[11] Moray Council (2012) The Moray Economic Strategy, [Online], available at http://www.moray.gov.uk/moray_standard/page_75361.html (Accessed 01/10/2024)
[12] Office for National Statistics (2022) Low carbon and renewable energy economy, UK: 2022, [Online], available at https://www.ons.gov.uk/economy/environmentalaccounts/bulletins/finalestimates/2022 (Accessed 24/09/2024)
[13] The University of Strathclyde (2022) Fraser of Allander Institute, [Online], available at https://www.strath.ac.uk/business/economics/fraserofallanderinstitute/ (Accessed 24/09/2024)
[14] Scottish Renewables (2023) Statistics, [Online], available at https://www.scottishrenewables.com/our-industry/statistics (Accessed 24/09/2024)
[15] Tourism in Moray (2014), [Online], available at https://www.hie.co.uk/media/5963/strategy-for-tourism-development-in-morayplus-a2333690.pdf (Accessed 02/10/2024)

Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise, and Skills Development Scotland. The strategy aims to create a world leading tourism sector in Scotland that is sustainable in the long-term. The 4 key priorities Scotland Outlook 2030 look to focus on to realise this ambition are:

- People;
- Places;
- Businesses; and
- Experiences.

The strategy acknowledges 6 conditions viewed as vital for success:

- Harnessing the power of technology and data;
- Having the right policy and regulatory landscape in place;
- Ensuring we have access to investment;
- Proactively investing in the right transport and digital connectivity;
- Providing a strong support network for our businesses; and
- Successful positioning of Scotland and its tourism industry.

The strategy also acknowledges climate change as the biggest threat faced within society today and tourism's contribution to this. A main commitment of the strategy is to address the effect of energy demand associated with tourism and make the sector commit to Scotland's ambition of being net-zero by 2045[16].

14.5.3.2 Tourism Indicators

Tourism is a significant element of the economy in Moray and the rest of rural Scotland. In 2023, Visit Moray Speyside reported that Moray had welcomed 877,000 visitors, helping generate £186 million[17]. In 2022, VisitScotland reported that the tourism sector made up 7.9% of employment in Moray, employing 3,500 people.

According to Visit Scotland, in 2023 84% of visitors to Moray were domestic, with 35% coming from Scotland, and the other 49% coming from the rest of the UK. The other 16% of visitors were international, with 8% coming from Europe, 5% Australasia, 3% North America, and 1% Rest of the World. The region had a high proportion of repeat visitors, with 91% of those who completed the Scotland Visitor Survey in 2023 falling into this category. This was much higher than that of other areas in North East Scotland, with Aberdeen only have 64% repeat visitors and Aberdeenshire having 80% repeat visitors.

Despite this, tourism within Moray plays a less significant socio-economic role in the area when compared to other areas of Scotland and compared to Scotland as a whole. Moray employs a smaller proportion of people in this industry than Scotland as a whole, with tourism accounting for 8.5% of employment within Scotland in 2022, 0.6% more than Moray. Other regions found within Scotland also employ more people within the tourism industry than Moray, with Aberdeen City employing 10,000 people (8.6% of employment in the area, and Aberdeenshire employing 8,000 people (5.4% of employment in the area)[18].

14.5.3.3 Local Attractions

One of the main attractions within Moray is the Speyside whisky industry, with Moray being home to more than half of Scotland's whisky distilleries. Whilst whisky is the main attraction, the region is also home to multiple craft distilleries and breweries, which also play a role in drawing visitors. Moray's rural nature also offers recreation opportunities in the natural environment such as fishing on the Spey and Findhorn rivers, mountain hikes, forests walks,

[16] Scotland Tourism Alliance (2020) Scotland Outlook 2030 & The THILG, [Online], available at https://scottishtourismalliance.co.uk/scotland-outlook-2030-overview/ (Accessed 02/10/2024)
[17] Moray Chamber of Commerce (2024) Visit Moray Speyside Celebrates Significant Increase in Tourism for 2023, [Online], available at https://www.moraychamber.co.uk/news/visit-moray-speyside-celebrates-significant-increase-in-tourism-for-2023#:~:text=In%202023%2C%20Moray%20Speyside%20welcomed,visitor%20numbers%20for%20the%20region). (Accessed 24/09/2024)
[18] VisitScotland (2023) Aberdeen, Aberdeenshire and Moray Speyside, [Online], available at https://www.visitscotland.org/research-insights/regions/aberdeen-aberdeenshire (Accessed 24/09/2024)

and dolphin watching off the Moray Coast. The area also has a rich history to explore, with multiple castles, cathedrals, fishing villages and royal burghs such as Elgin[19].

The Speyside Stages Rally takes place annually within the Site, making use of the existing forestry track network. Visitor numbers to this are not known but the 2024 race had 95 seeded competitors taking part[20].

14.5.3.4 *Proximity to Local attractions*

There are 7 local visitor attractions found within 5 km of the Site. The attraction and their distance to the Site are set out in Table 14.5. The local attractions were found on the Visit Scotland website[21].

The closest attraction to the Site is Speyburn Distillery, located 1.3 km to the east. It was founded in 1897 and produces the award-winning Speyburn whisky. Speyburn Distillery also offers touring and tasting opportunities. One other distillery was identified as being within 5 km of the Site; the Glen Grant distillery and Garden, found 2.2 km away. This attraction is part of Speyside's Malt Whisky Trail, which is a popular tourist route incorporating 7 different distilleries in Moray[22].

Table 14.5: Local Attractions in Moray

Local Attraction	Description	Distance to the Site (km)	Sensitivity
Speyside Stages Rally	Annual rally taking place within Teindland Wood	Within Site	Medium
Speyburn distillery	Distillery established in 1897, producing Speyburn whisky and offers tours.	1.3 km	Medium
Glen Grant distillery and Garden	Whisky distillery founded in 1840. Part of Speyside's malt whisky trail. Also offers tours and tasting sessions.	2.2 km	Medium
Threaplands	Garden centre and restaurant founded in 1995.	3.7 km	Low
Elgin Kart Raceway	Go karting and activity centre.	3.7 km	Low
House of Mulbern	Outdoor activity centre.	4.4 km	Low
(2) The Speyside Way	Mountain biking route running from Spey Bay to Aviemore.	4.5 km	Low
The Ordiequish Earth Pillars	Viewpoint	4.7 km	Medium
Wardend Fisheries	Fishery that houses accommodation, a café and a shop.	4.7 km	Low
Ben Aigan Peak	Hilltop	4.8 km	Medium
Speyside Falconry	Bird of Prey falconry that offers private falconry experiences.	4.8 km	Low

14.5.3.5 *Accommodation*

There are multiple locations within the area that offer accommodation. Table 14.6 shows accommodation options that have been identified within 5 km of the Site. Accommodation

[19] VisitScotland (2024) Moray Speyside, [Online], available at https://www.visitscotland.com/info/towns-villages/moray-speyside-p1277541 (Accessed 24/09/2024)
[20] Speyside Stages (2024) Seeded Entry List, [Online] Available at: https://www.rallies.info/webentry/2024/speyside/entries.php?type=s (Accessed 13/03/2025)
[21] VisitScotland (2024) Things to do Moray Speyside, [Online], available at https://www.visitscotland.com/info/see-do/search-results?prodtypes=acti%2Cattr%2Creta&loc=Moray&locpoly=941&locprox=0&order=gradingDesc (Accessed 26/09/2024)
[22] VisitScotland (2024) Speyside's Malt Whisky Trail, [Online], available at https://www.visitscotland.com/things-to-do/food-drink/whisky/speyside-malt-whisky-trail-itinerary (Accessed 26/09/2024)

has been identified through the Visit Scotland and Visit Moray Speyside websites[23, 24]. It is acknowledged that there may be additional accommodation on offer that have not been identified.

Accommodation within the area is largely spread out, with small clusters being found in Rothes and in the Fochabers area. Whilst some accommodation was identified within relatively close proximity to the Site boundary, the majority of these were at least 2 km away from the nearest proposed turbine.

Table 14.6: Accommodation within 5 km of the Site

Accommodation Name	Postcode	Distance from Proposed Site Boundary (km)
Orton Estate Holiday Properties	IV32 7QE	0.7 km (over 2 km to nearest turbine)
Rothes Glen	AB38 7AQ	1.2 km
Trochelhill Country House	IV32 7LN	1.2 km (over 2 km to nearest turbine)
Braehead Glamping and Camping	IV32 7QH	1.3 km (over 2 km to nearest turbine)
Drumbain Croft	AB38 7AQ	1.3 km (over 2 km to nearest turbine)
Collie Farmhouse	IV32 7QF	1.4 km (over 2 km to nearest turbine)
The Station Hotel	AB38 7BJ	2.5 km
Marys Apartment	AB38 7BT	2.5 km
OYO Eastbank Hotel	AB38 7AU	2.6 km
Cairnty Lodges	AB55 6XU	2.8 km (over 4 km to nearest turbine)
Dipple House	IV32 7QA	2.9 km (over 4 km to nearest turbine)
Calderwood Annexe	AB38 7AW	3.5 km
Duke Cottage	IV32 7DN	4.6 km (over 6 km to nearest turbine)

14.5.4 Recreational Trails

A series of recreational paths, routes and trails were identified within 5 km of the Site boundary. Core paths, identified through the Moray Council website, are shown in Table 14.7[25]. Walking routes found on the Walkhighlands website are identified in Table 14.8[26].

[23] VisitScotland (2024) Moray Speyside, [Online], available at https://www.visitscotland.com/info/towns-villages/moray-speyside-p1277541 (Accessed 26/09/2024)
[24] VisitMoraySpeyside (2024) Places to Stay, [Online], available at https://morayspeyside.com/find/places-to-stay/ (Accessed 26/09/2024)
[25] Moray Council (2024) Existing Adopted Core Paths Plan Maps, [Online], available at http://www.moray.gov.uk/moray_standard/page_52370.html (Accessed 30/09/2024)
[26] Walkhighlands (2024) Moray and Nairn walks, [Online], available at https://www.walkhighlands.co.uk/moray/ (Accessed 30/09/2024)

Table 14.7: Core Paths within 5 km of the Site

Route reference	Distance from Site boundary (km)
CP-SW03	1 km
CP-EG52	1.1 km
CP-SP15	2.3 km
CP-SP14	2.5 km
CP-SP16	2.5 km
CP-SP17	2.5 km
CP-SP18	2.5 km
CP-SP12	2.6 km
CP-SP13	2.7 km
CP-EG53	2.8 km
CP-FB21	3.7 km
CP-FB27	3.7 km
CP-EG73	3.7 km
CP-SP01	3.8 km
CP-FB17	4.1 km
CP-FB23	4.2 km
CP-FB13	4.3 km
CP-SW02	4.4 km
CP-FB08	4.4 km
CP-FB09	4.4 km
CP-FB11	4.4 km
CP-FB12	4.4 km
CP-FB20	4.4 km
CP-EG57	4.4 km
CP-EG58	4.4 km
CP-FB19	4.6 km
CP-EG56	4.6 km
CP-FB22	4.7 km
CP-FB10	4.8 km
CP-FB14	4.8 km
CP-FB18	4.8 km
CP-EG55	4.8 km

Table 14.8: Recreational Routes within 5 km of the Site

Route Name	Description	Distance from Proposed Site Boundary (km)
(2) The Speyside Way	Makes up part of the famous Speyside Way, running 20 km along the river Spey from Fochabers to Craigellachie.	1 km (over 2.7 km from nearest turbine)
The Dounie, Rothes	A short circular walk through woodlands.	2.6 km (over 3.0 km from nearest turbine)
Loch na Bo, near Lhanbryde	Short circular woodland route around the man-made Loch na Bo.	2.8 km (over 4.3 km to nearest turbine)
Millbuies Country Park	A short circular walk around Millburies Loch.	3.7 km (over 3.9 km to nearest turbine)
Ben Aigan	A hillwalk up to the summit of Ben Aigan, with views over Moray.	3.3 km (over 4.5 km to nearest turbine)

No core paths pass through the Site. The two closest paths are CP-SW03 and CP-EG52. CP-SW03 is located to the southeast of the Site, running along the river Spey and despite being 1 km from the Site boundary, it is over 2.5 km from the nearest proposed turbine. CP-EG52 is located to the northeast of the Site, passing through the hamlet of Orbliston, and is over 2 km from the nearest proposed turbine. Large clusters of core paths were located around the Rothes area and in the Fochabers area.

No formal walking routes identified pass through the Site. The closest walking route to the Site is The Speyside Way (2), which is also the aforementioned CP-SW03 core path. The Speyside way (2) makes up part of the famous Speyside Way trail which follows Scotland's second-longest river, the Spey. As of 2020, £343,000 of improvements were completed to this section of the route, causing daily walking and cycling usage to increase, with up to 200 people using the path per day[27]. At its closest, the route comes within 1 km of the Site boundary, and within 2.6 km of the nearest turbine.

Teindland Forest has an area set aside for public parking, at the current Site entrance (NGR 330181, 856399), which is commonly in use by people using the forest tracks for walking and cycling.

It is acknowledged that public access is not limited to the core paths and trails identified, particularly under consideration of the Land Reform Act (Scotland) 2003 (Updated 2016)[28].

There are a number of forestry trails within the Site that are known to be used by the public for recreational walking and horse riding, with public parking available at the proposed Site entrance.

The annual Speyside Stages Rally race also takes place within the Site, making use of the existing forestry trails.

14.5.5 Public Attitudes towards Wind Farm Development

Public perception plays a significant role in the performance of tourism in an area. This section of the report looks at studies across the UK to assess the public's perception of wind farm developments.

The Department for Energy Security and Net Zero Public attitudes tracker for spring 2024[29] found that support for renewable energy remains high at 84%, this is 2% higher than in

[27] Moray Council (2020) Major investment in Speyside Way, [Online], available at https://newsroom.moray.gov.uk/news/major-investment-in-speyside-way (Accessed 01/10/2024)
[28] Legislation - Land Reform (Scotland) Act 2016, [Online], available at https://www.legislation.gov.uk/asp/2016/18/contents (Accessed 01/10/2024)
[29] The Department for Energy Security and Net Zero Public (2024) Public Attitudes Tracker: Spring 2024, [Online], available at https://www.gov.uk/government/statistics/desnz-public-attitudes-tracker-spring-2024#:~:text=Attitudes%20to%20renewable%20energy%20remained,in%20which%20they%20are%20located (Accessed 01/10/2024)

Winter 2023. Overall opposition for renewable energy remains low at 2%. The attitude tracker also found that 77% of the public were in support of onshore wind renewable energy developments. Support for onshore wind renewable energy has stayed consistent over the last 2 years, with support for this type of development only decreasing by 1% since spring 2022.

A common interest for residents in close proximity to onshore wind energy developments is how developments may affect local house prices. In recent years, due to the increasing number of wind farm developments, multiple studies have been conducted looking into the relationship between house prices and proximity to onshore wind farms. In 2015, Gibbons conducted a study looking into this, estimating the effects of wind farm visibility on housing prices in England and Wales. Overall he found that wind farms reduce house prices in areas where the turbines are visible. Averaging over wind farms of all sizes, Gibbons found that a 5-6% reduction in house price is expected for houses within 2 km, when the wind farm development is visible. This falls to less than 2% for houses located between 2 and 4 km and falls again to less than 1% by 14 km[30]. A year later in 2016, ClimateXChange conducted a similar study for properties in Scotland, assessing the impact wind farm developments have on house prices. This study was based on analysis from the sales of over 500,000 properties in Scotland between 1990 and 2014. The study found no evidence of a consistent negative effect on house prices, with most results either showing no significant change in the price of properties within 2-3 km or finding a positive effect[31].

The increase in wind farm developments in Scotland has also brought about an interest in the relationship between onshore wind developments and the tourism industry. BiGGAR Economics published a report in 2021, assessing Wind Farms and Tourism Trends in Scotland, based off evidence from 44 Wind Farms[32]. From 2009-2019 the onshore wind sector has significantly expanded in Scotland, with installed capacity growing from 1,753 MW to 7,969 MW in this time period, and 2690 new turbines being installed. Despite this, tourism-related sectors grew over this decade by 20%, suggesting the expansion of the onshore wind sector did not detrimentally effect tourism. The study also analysed the rates of change in the number of onshore wind turbines and in tourism-related employment in local authority areas, finding no correlation between the factors over the decade.

BiGGAR Economics also analysed the trends in tourism for areas that are in the immediate vicinity of wind farms. This assessment looked at 16 wind farms of at least 10 MW capacity, which had become operational between 2015 and 2019 and a 15km radius study area around each development. Analysis of the trends showed that 11 of these areas experienced greater growth in tourism employment when compared to Scotland as a whole. Moreover, for 12 of the 16 windfarms, trends in tourism in the immediate locality outperformed the local authority area in which they were based.

The study concluded that the analysis identified no evidence of a negative relationship between tourism and the development of onshore wind projects from 2009 to 2019.

14.6 ASSESSMENT OF POTENTIAL EFFECTS

14.6.1 Effects on Socio-Economics

The investment in the Development has the potential to generate multiple socio-economic effects for the local area. Potential socio-economic effects can be divided into:

- Direct effects, this would include employment opportunities in construction of the Development, operation and maintenance of the Development, decommissioning of the Development, and the community benefit scheme;

[30] Stephen Gibbons (2015) Gone with the Wind: Valuing the Visual Impacts of Wind Turbines through House Prices. *Journal of Environmental Economics and Management* 72, doi: 10.1016/j.jeem.2015.04.006.
[31] Heblich et al., (2016) Impact of wind turbines on house prices in Scotland, [Online], available at https://www.climatexchange.org.uk/media/1359/cxc_wind_farms_impact_on_house_prices_final_17_oct_2016.pdf (Accessed 09/10/2024)
[32] BiGGAR Economics (2021) Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms, [Online], available at https://biggareconomics.co.uk/wp-content/uploads/2021/11/BiGGAR-Economics-Wind-Farms-and- Tourism-2021.pdf (Accessed 09/10/2024)

- Indirect effects: social and economic opportunities created down the supply chain by the companies involved in the construction, operation and maintenance, and decommissioning of the Development;
- Wider effects: effects on the wider economy that would come from the Development such as skills development of the workforce and worker retention; and
- Induced effects: employment created through the additional spending within the local economy.

14.6.1.1 Wider Economic Benefits

In terms of potential supply chain benefits, the Development provides opportunities for the involvement of local, regional and Scottish suppliers in a range of activities, including research and development, design, project management, civil engineering, component fabrication / manufacture, installation and maintenance.

With an increasing number of wind farm schemes either operational, under development or having gained consent in Scotland, the commercial viability, and job prospects amongst Scottish firms, has improved. Cluster benefits in the industry increase where firms are supported by the spending of other firms within the renewables sector. The net effect is to increase business and employment opportunities within Scotland's renewable energy sector, boosting the performance of local and national economies.

In addition, during the construction process there will be opportunities where those employed will develop skills that will be of benefit to the local economy and to local businesses in the longer term. Further, employment generated through the Development will contribute to diversifying the local economy and help support the retention in the area of the working age population.

14.6.1.2 Construction Effects

Employment

Local sourcing of equipment is preferred whenever possible, but this procurement is subject to tendering and may be constrained by the specialist nature of some of the equipment. Qualified local contractors will be encouraged to tender for construction, operation and maintenance work wherever possible, to ensure maximum benefit to local communities.

Among the services that local contractors may be able to provide during the construction phase:

- Haulage and transport services;
- Site clearance;
- Access road, turbine platform construction and other civil engineering services;
- Site and ground investigation services;
- Building construction, electrical, plumbing, roofing, flooring, plastering, decorating and joinery services;
- Crane companies to provide lifting services;
- Plant and equipment hire;
- Fencing, road furniture and signage installation;
- Supply of building and electrical materials (e.g. aggregates, concrete, cabling, equipment, culvert tubes etc.);
- Mechanical, electrical, project management and supervisory services;
- Provision and servicing of temporary welfare facilities; and
- Supply of fuel and other consumables.

It is anticipated that a temporary workforce peaking at 30 people will be employed during the 12-month construction period. Calculated by 'job years', one individual working for 12 months would result in 1 job year; therefore, 30 individuals working during the 12 month construction period represents 30 job years. Given this is a short-term employment gain, using standard conversion of 10 job years for one Full-Time Equivalent (FTE) position, this is equivalent to 3 FTE positions.

There would also be knock on effects from the direct employment during the construction and development of the Development as employees spend a proportion of their salaries in the wider economy, creating indirect benefits. Annual research undertaken by the

engineering and technology magazine, The Engineer, found in 2024[33] that the average salary for employees in the renewables, energy and nuclear sector was at that time, £66,193.

Overall, the construction of the Development will have positive, short-term, direct and indirect effects on the area, through the increase in employment. This will not result in any fundamental or long-term change to population, local services, employment or overall structure of the community, but will represent a minor positive effect at a local level. This is considered **not significant** in terms of the EIA regulations.

Induced Effects

It is likely that there will be some local employment generated as an indirect result of the construction of the Development. This could include supply chain spin-offs for local businesses and sub-contracted work relating to the transportation of labour and materials. Local shops, cafes, accommodation providers and hotels often experience an increase in turnover during the construction phase as they have opportunities to provide additional services to the developer and their contractors. There are several accommodation options in the local and wider area, and it is expected that local services will be used by temporary construction contractors.

There may also be the opportunity for local people, who are employed by the appointed contractors, to work on the Development. They would be developing skills gained during construction which will be of benefit to both individuals and the local economy in the longer term. Skills gained or improved may include project management and construction skills which would be transferrable to other construction roles, including other wind farm projects.

Overall, the construction of the Development will have positive, short-term, induced effects on the area, through the increase in employment. This will not result in any fundamental or long-term change to population, local services, employment or overall structure of the community, but will represent a minor positive effect on the economy at a local level. This is considered **not significant** in terms of the EIA Regulations.

Capital Expenditure

Based on the BiGGAR Economics report commissioned by RenewableUK[34], onshore wind Capital Expenditure (CAPEX) is £1.32 million per MW on average. This includes the following elements:

- Turbine: Tower; Blades; and Nacelle;
- Balance of Plant: Civil and Project Management; Roads; Substation; Buildings; Turbine foundation and hardstanding; Landscaping/forestry/fencing; Mechanical and electrical installation; and
- Grid Connection: Engineering services; Construction; Electrical Components; and industrial equipment and machinery.

This assessment assumes that the Development has a capacity of 171.4 MW based on 12 7.2 MW turbines, and a battery energy storage system (BESS) of 85 MW export capacity. Assuming an installed capacity of 171.4 MW, the total CAPEX of the Development would be expected to be approximately £226.25 million. Excluding the BESS, as this may not be taken forward regardless of whether it receives consent, the CAPEX for the wind farm is expected to be approximately £114.05 million.

The RenewableUK report estimates that, of these construction costs, regional expenditure would be 12% (in this case Moray); national expenditure would be 36% (Scotland); and UK expenditure would be 47%. The remaining 53% of construction costs will be spent out with the UK.

On this basis, it is estimated that, during the construction phase, the Development (assuming a 171.4 MW scheme) will be worth approximately £106.34 million to the UK economy. Of that approximately £81.45 million is expected to be spent within Scotland (national) and £27.15 million is expected to be spent within Moray (regional).

[33] The Engineer (2024) Salary Survey [Online] Available at: https://teng.mydigitalpublication.co.uk/articles/salary-survey?article_id=4751880&i=818710 (Accessed 18/03/2025)
[34] BiGGAR Economics (2015) Onshore Wind: Economic Impacts in 2014. BiGGAR Economics Report.

When excluding the BESS, the Development would be worth approximately £53.60 million to the UK economy, £41.06 million of which is expected to be spent in Scotland, and £13.69 million would be expected to be spent in Moray.

The Development will bring positive, short-term, direct, indirect and induced effects to the national and regional area, through the expenditure on capital costs.

The change will be of low magnitude at the regional level (medium sensitivity) and negligible at a national level (high sensitivity). Therefore, minor, positive effects are anticipated at a regional and national level, which is considered **not significant** in terms of the EIA Regulations.

14.6.1.3 Operational Effects

Employment

The Development will have both direct and indirect effects on employment during operation. The Development will be regularly maintained by a specialist maintenance team. Employees are likely to include a part-time maintenance engineer (local site operator) and a small number of staff to occasionally service the turbines. Induced effects will include local spending by the Applicant and maintenance contractors.

Overall, the operation of the Development will bring long-term, beneficial, direct, indirect and induced effects to the area, through the increase in employment and business opportunities. This will not result in any fundamental or long-term change to population, local services, employment or overall structure of the community, but effects will be of low magnitude at the local level (of low sensitivity). Employment effects arising from the operational phase are of negligible, positive significance, but this is considered to be **not significant** in terms of the EIA Regulations.

Operation Expenditure

In the 2015 RenewableUK report[35] on the economic benefits of the UK onshore wind industry, the average cost of an onshore wind farm was £59,867 per MW installed per annum. This includes:

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

The annual Operational Expenditure (OPEX) for the wind farm (excluding the BESS, as a worst-case, given that the market is evolving rapidly and therefore reliable data could not be sourced) is expected to be approximately £5.17 million. Of this, £2.17 million would be spent in the local area. £5.5 million of the total operation and maintenance expenditure will likely be within the UK.

The OPEX for the Development is not substantial in magnitude in comparison to the annual gross domestic product (GDP) of Moray or the value of the renewable industry in Scotland, with the majority of the expenditure taking place at the local, regional or national level. This is considered to be a negligible effect, and **not significant** in terms of the EIA Regulations.

Community Benefit

The community benefit package for the Development will include a community benefit fund of £5,000 per MW of generation capacity from the wind turbines, meaning that up to £432,000 per annum would be delivered to the local community. With this funding, projects brought forward by the local community could provide positive benefits to the local economy, local facilities and the general quality of life for local residents.

[35] **BiGGAR Economics** (2015) *Onshore Wind: Economic Impacts in 2014*. BiGGAR Economics Report.

In addition to the above, the Developer is also open to exploring opportunities for shared ownership of the Development, where the local communities would be given the opportunity to buy-in to the project, allowing them to receive a share of profits.

14.6.1.4 Decommissioning Effects

Socio-economic effects during the decommissioning phase are anticipated to be of a similar nature and scale as construction effects thereby representing a minor short-term, positive effect at local level, which is considered **not significant** in terms of the EIA Regulations.

14.6.2 Effects on Land Use

The Site covers an area of approximately 1,054 ha. However, the total infrastructure footprint is substantially less. The total land take of the Development, consisting of the turbine infrastructure (wind turbine foundations, crane hardstandings, access tracks, construction compound, substation and battery energy storage unit equates to approximately 24.1 ha. This equates to approximately 2.3% of the total land within the Site.

As detailed in Section 14.5.2, there are multiple existing land uses operating on Site, including; active forestry, and public recreation (in the form of walking, horse riding, and motor rallying).

Part of the access track network required for the Development will utilise existing tracks which are currently used for forestry operations and will require upgrading. Effects arising from the Development on the recreational use of the land (walking, horse riding, and motor rallying) including these tracks are detailed within Section 14.6.4 and are not considered further here.

14.6.2.1 Construction Effects

Construction effects on land-use receptors are considered to be limited, with the largest impact being on forestry operations. 40.18 ha of forestry are expected to be felled and exported off of the Site, though it should be noted that this is a negligible impact considering the scale of forestry within the Site. Forestry operations may also be impacted by ongoing construction works but can resume upon completion of construction of the Development.

As such, construction effects will be limited and temporary in nature, the magnitude of change are considered low.

Effects on land use arising from the construction phase is therefore considered to be of Minor significance, which is **not significant** in terms of the EIA Regulations.

14.6.2.2 Operational Effects

The operational phase of the Development will result in a loss of land which would otherwise continue to be used for forestry. From the total area within the Site of 1,054 ha, as noted above it is anticipated that the overall land-take as a result of the Development will be 24.1 ha, equating to around 2.3% of the land within the Site.

The existing land uses operating on Site will continue through the operational phase and will be largely unaffected by the Development.

The change to land use is therefore considered to be of low magnitude, with a small percentage of the land on Site being altered to a wind farm development. The land-take on a medium sensitivity receptor is a long-term, Minor effect on land-use, which is considered to be **not significant** in terms of the EIA Regulations.

14.6.2.3 Decommissioning Effects

The operational lifespan of the Development will be up to 40 years. Following this, an application may be submitted to retain or replace the turbines and/or batteries, or they could be decommissioned. It is anticipated that there will be no additional land-use effects associated with the decommissioning of the Development.

Disruption to land-use during decommissioning will be similar to that during construction.

It is expected that decommissioning will take up to 8 months to complete and will involve the reinstatement of the turbine foundations and associated hardstanding and demolition and removal of control building and compound. The land will be restored with topsoil and allowed to regenerate as part of forest management at that time. This will reduce the permanent

land-take for the Development. There will be minimal permanent land take following decommissioning, largely consisting of the access tracks for use by the landowners. Prior to decommissioning works being undertaken, a comprehensive restoration plan setting out the specific methods of reinstatement will be agreed with Moray Council.

The land-use is a medium sensitivity receptor and the magnitude of effect is expected to be low. Effects on land use arising from the decommissioning phase is therefore considered to be of Minor significance, which is **not significant** in terms of the EIA Regulations.

14.6.3 Effects on Recreation and Tourism

Potential effects on the tourism and recreational resource are categorised as:

- Direct physical effects: for example, temporary diversion of recreational routes during the construction period; and
- Indirect effects: such as the changes in amenity at tourism and recreational receptors.

14.6.3.1 Construction Effects

Recreational Routes within the Site

The Site is accessible by virtue of the recreational routes on site via the Land Reform Act (Scotland) 200336, however, access to areas where construction is taking place or where there is construction related activities will be restricted. The Construction (Design and Management) Regulations 2015[37] is a legal obligation for health and safety purposes. Notices will be placed in prominent locations around the Site with details of any areas with restricted access. Such measures would be agreed in advance with the Council in the form of an Access Management Plan, as detailed in Section 13.6. These measures are expected to apply only to routes where Development access tracks are proposed to run.

The routes within the Site are not designated Core Paths and therefore are considered to be of local importance rather than regional importance. It is considered therefore that the 'wider network' recreational routes within the Site are of low sensitivity. The effects on these walking routes within the Site during construction will be limited to temporary access restrictions and general amenity from the construction site. For those routes on which access tracks for the Development are proposed, there may be some temporary disruption as a result of construction traffic utilising the routes to access the Site.

The magnitude of change would be low, given the construction phase will be temporary and restricted to parts of the Site where construction is taking place.

Therefore, the effect on walking routes within the Site is considered to be a short-term and Negligible effect, which is **not significant** in terms of the EIA regulations.

Recreational Routes within the Recreation Study Area

The network of recreational routes within the Recreation Study Area contains both designated Core Paths and non-designated routes. Therefore, they are considered to be of Medium to Low sensitivity as they are of regional to local importance. The construction phase will have no direct effects on recreational routes within the Secondary Study Area as they are located outwith the Site. Indirect construction effects on amenity and enjoyment of these routes will be localised, as the construction works will only be detectable to route users for short periods along the routes where there is visibility of the Development. As the routes are of Medium to Low sensitivity, and the magnitude of change is considered to be negligible, the effects are considered to be short-term and negligible, and therefore **not significant** in terms of the EIA regulations.

Tourism and Recreation Receptors within the Site

As detailed in Table 14.5, there is only one recreation receptor located within the Site, not including the network of forestry paths enabling amenity access; the Speyside Stages Rally which takes place annually.

[36] Scottish Government (2003) Land Reform (Scotland) Act 2003 [Online] Available at: https://www.legislation.gov.uk/asp/2003/2/contents (Accessed 18/03/2025)
[37] Health and Safety Executive (2015) The Construction (Design and Management) Regulations 2015 [Online] Available at: http://www.hse.gov.uk/construction/cdm/2015/index.htm (Accessed 18/03/2025)

It is considered that the Speyside Stages Rally is of regional importance and therefore has a medium sensitivity. The potential effect on this receptor is expected to be similar to that of recreational routes within the Site, such that effects are expected to be limited to temporary access restrictions. Disruption and restriction to access is expected to be temporary, only for as long as the construction period, and the rally can resume after construction is completed.

The magnitude of effect would be low, given the construction phase will last for 12 months only.

Therefore, the effect on Tourism and Recreation Receptors within the Site is considered to be a short-term and Minor effect, which is **not significant** in terms of the EIA Regulations.

Tourism and Recreation Receptors within the Study Area

Offsite receptors such as the assets identified in Table 14.5 and the accommodation providers detailed in Table 14.6, are unlikely to be affected by the construction of the Development. Due to the intervening distance of these receptors from the Site, it is considered that the magnitude of effect would be low, on low sensitivity receptors. Furthermore, as detailed in Section 14.5.3, it is not likely that these receptors would receive reduced visitor numbers as a result of the wind farm. Therefore, this signifies a short-term, negligible effect which is considered to be **not significant** in terms of the EIA Regulations.

Local shops, cafes, accommodation providers and hotels often experience an increase in turnover during the construction phase as they have opportunities to provide additional services to the developer and their contractors. The Development will result in a short- term effect at local level, resulting in a Minor positive effect, which is **not significant** in terms of the EIA Regulations.

As stated throughout this Section, the effects of the construction phase of the Development are considered to be **not significant** on tourism and recreation receptors in accordance with the EIA Regulations.

14.6.3.2 Operational Effects

Visual effects associated with the Development may occur at receptor locations, when people are looking towards the Development and from locations where clear views of the turbines are accessible. The visual effects of the Development on tourism and recreational resources are assessed in Chapter 5: Landscape and Visual Impact Assessment of the EIAR. It should be noted that there is a distinction between a visual effect and effects on recreational amenity. Effects on recreational amenity are described as effects that would influence the recreational value *e.g.* use or enjoyment of an asset such as a walking route, a hill or other attraction.

Recreational Routes within the Site

The Site will be accessible to the public at all times of the year as per the Land Reform Act (Scotland) 2003. However, temporary exclusions may be required for onsite routes for health and safety reasons during times where essential maintenance is required and when maintenance vehicles are utilising the route to access the Development. Where these exclusions are required, clear signage advising of the restrictions will be provided. Such measures would be agreed in advance with the Council in the form of an Access Management Plan, as detailed in Section 13.6, and are expected only to apply to routes through which Development access tracks run. This would represent a low magnitude of change on low sensitivity receptors, representing a negative, long-term, Negligible effect which is **not significant** in terms of the EIA Regulations.

The operation of the Development is therefore not expected to alter the features or characteristics of recreational routes and Core Paths within the Secondary Study Area. It is expected that the Development will have no impact on the behaviour of visitors/tourists that use paths within the Site during operation. Therefore, the effect assessed is considered to be negligible on a Medium to Low sensitivity receptor, therefore resulting in a Negligible effect which is **not significant** in terms of the EIA Regulations.

Recreational Routes within the Study Area

Surveys of the public's attitudes to wind farms and a case study analysis of 44 wind farms in Scotland provide no clear evidence that the presence of wind farms in an area has an adverse impact on local tourism (see Section 14.5.5 of this Chapter). Tourists using the

recreational routes and Core Paths may have a particular sensitivity to visual effects; however as detailed above, the magnitude of change for Tourism and Recreation is expected to be low on a Medium sensitivity receptor. Hence, even where significant visual effects are predicted, this does not necessarily elicit a significant, adverse change to a particular tourism or recreational receptor. The following paragraphs summarise the visual effects, as assessed within Chapter 5: Landscape and Visual Impact Assessment.

Chapter 5: Landscape and Visual Impact Assessment presents an assessment of the following Core Paths and recognised walking routes within the Secondary Study Area;

- North East 250 Scenic Driving Route; and
- Speyside Way.

On the North East 250 Scenic Driving Route, the landscape assessment identifies localised visual effects that are considered to be Medium to Moderate magnitude of change. This results in a **significant** visual effect to users of the path.

The landscape chapter assessed the visual effect on the Speyside Way as being **significant** due to a Medium magnitude of change due to permanent changes to localised stretches of views for parts of an approximately 10 km section of the route between Knock More and Craigs of Quildell.

Whilst visual effects may be identified as significant due to clear visibility of the Development, as detailed in the Section above, there is no evidence to suggest that the presence of wind turbines deters local tourism. Whilst tourists may have a particular sensitivity to visual effects, access to the routes will remain largely unaffected.

Hence, despite significant visual effects predicted on sections of particular scenic routes, adverse effects of the operational phase of the Development on these receptors, in terms of Tourism and Recreation, will be Minor and **not significant** in accordance with the EIA Regulations.

Tourism Receptors within the Study Area

There is potential that the Speyside Stages Rally may pass nearby Development infrastructure where there would be a risk of collision if a vehicle was to lose control at speed and collide with structures proposed as part of the Development. The vast majority of proposed infrastructure is set far enough back from access tracks that a potential collision is not deemed to be a risk; however, the BESS and Substation compound in the southeast of the Site is close enough to the tracks that there may be risk of collision here. Review of previous rally routes show that the proposed BESS compound is directly adjacent to where the rally route has taken a sharp left turn, which could represent a risk of collision if a driver loses control at this corner. Accounting for these additional structures and changing driver behaviour due to the increased risk, may represent a Low to Medium magnitude of change for the Speyside Stages Rally. Without mitigation, this would constitute a **significant** effect in terms of the EIA Regulations.

The visual effect on the peak of Ben Aigan is deemed as significant in Chapter 5. The paths on Ben Aigan up to the summit pass through forestry and so these are not significantly affected. The Summit however have open views of the Development from the summit and the upper north and west facing slopes that are free of forestry. These views represent Major to Moderate magnitude of change.

From the Ordiequish Earth Pillars northeast of the Site, the Development would be seen along the forested skyline. A wide extent of the view would be affected given the turbines are seen within the primary focal area of the view. The Development then would give rise to a Major to Moderate magnitude of change and thus represents a significant visual effect in Chapter 5.

Whilst visual effects on Ben Aigan and the Ordiequish Earth Pillars may be identified as significant due visibility of the Development as detailed above, there is no evidence to suggest that the presence of wind turbines deters local tourism, or harm in any way other than visual the recreational amenity of these receptors. Whilst tourists may have a particular sensitivity to visual effects, access to the routes will remain largely unaffected.

Hence, even despite significant visual effects predicted on sections of particular scenic locations and hilltops, adverse effects of the operational phase of the Development on the

recreational amenity and tourism associated with these receptors will be Minor and **not significant** in accordance with the EIA Regulations.

14.6.3.3 Decommissioning Effects

Effects during the decommissioning phase are anticipated to be of a similar nature and scale as construction effects and are therefore **not significant** in terms of the EIA Regulations.

14.7 MITIGATION AND RESIDUAL EFFECTS

The effect of the temporary closure of the recreational walking routes and other recreational receptors within the Site (as detailed in Table 14.5 and Table 14.7) during the construction period is considered to be a short-term, Negligible to Minor effect. The mitigation proposed for this effect is that, where temporary closures, access restrictions or diversions are required for health and safety purposes, notices will be placed in prominent locations around the Site with details of any areas with restricted access and where routes have been diverted. Such measures would be committed to within an Access Management Plan, to be drafted and agreed with Moray Council prior to construction.

Generally, where path routes cross construction tracks, if this is known about then the crossing can be managed by the construction contractor so as to keep the route open to walkers, and when it is closed a banksman could be present to manage the crossing. This would be detailed in the Access Management Plan.

The parking area referred to in Section 14.5.4, at the current Site entrance, is also where construction traffic is proposed to enter the Site. Alternative locations for a public parking area, temporarily during the construction phase, were sought, but all involved substantial felling operations and/or requirement to cross the public road to get from the parking to the forest. Instead, it is proposed to leave the current parking in place, but to manage it so that there is minimal interaction between public vehicles and construction vehicles. This is expected to be achieved by installing a fence between the parking and the track and signposting a one-way system for the public to enter at one end of the parking and leave at the other, so there is no reversing of vehicles into the construction traffic. The construction site gate would be to the west of the parking area. Additional paths would be created as alternatives to the existing forest tracks, which would be closed to the public as explained above. This would be detailed in the Access Management Plan.

Whilst no significant effects were identified, it is anticipated that the Access Management Plan will cover all identified routes within the Site which are proposed as access tracks for the Development only. The purpose of the Access Management Plan is to manage, and reduce as far as practicable, adverse effects on public access and recreation, as identified in Section 14.6.4.

This mitigation proposed is not considered to change the significance of the effect as any diversions will still present a slight alteration to the baseline of the asset; however, the effect remains not significant in terms of the EIA Regulations.

A significant effect was identified on tourism assets within the Site, through the increased risk to participants of the Speyside Stage Rally at the track corner adjacent to the proposed BESS/substation. It is expected that this can be mitigated in the form of an earth bank between the track corner and the BESS/substation. This bank would prevent collision of vehicles with electrical infrastructure. Details of this would be set out in the Access Management Plan. This proposed mitigation reduces the significance of effect to negligible-minor. Thus, the residual effect is **not significant** in terms of EIA Regulations.

14.8 CUMULATIVE EFFECTS ASSESSMENT

The appropriate scale for considering cumulative development depends on the nature of the potential effect. These are considered in turn, for each category of potential effect.

There are a number of wind farms within the 10 km of Site boundary either consented or in the planning process, as set out in Table 14.9.

Table 14.9: Cumulative Wind Farm Sites within 10 km of the Site

Wind Farm	Status of Wind Farm	Turbine Count	Approximate Distance from the Site
Rothes I Wind Farm	Operational	18	9.3 km southwest
Rothes II Wind Farm	Operational	28	8.4 km southwest
Rothes III Wind Farm	Consented	28	6.3 km southwest
Hill of Towie Wind Farm	Operational	21	6.2 km southeast
Kellas Drum Wind Farm	In Planning	8	8.2 km west

14.8.1 Socio-Economics

Regional socio-economic effects have been defined as at the scale of the Council administrative areas (Moray). The beneficial socio-economic effects associated with the Development would be increased and prolonged as a result of the construction and operation of cumulative wind farm developments, benefiting both the construction and energy generation sectors. However, even with the addition of the Development, the combined effect with other wind farms would be considered unlikely to lead to a fundamental change in economic activity within Moray. This is considered to be **not significant** in the terms of this EIA, and in terms of the EIA Regulations.

Potential exists in the future, should a large enough number of wind farms be consented in the area, for job creation to occur to support the industry. However, at a regional level, the sustaining of jobs, in construction in particular, is considered to be not significant.

The greater the capacity of consented and constructed developments in the area, the more likely it is that the local area can benefit from supply chain opportunities. Additionally, it is likely that operations and maintenance operations of the Development will be based locally as there would be enough opportunity locally to employ full time employees and companies.

14.8.2 Land Use

There can be no cumulative effects of other wind farms on land use within the Site, because the other developments will not affect land at the Site.

14.8.3 Recreational and Tourism

Cumulative effects on the amenity of tourism and recreation receptors during operation are strongly linked to visual effect. As set out in Section 14.5.5, there is no evidence that tourism is adversely impacted by wind farms.

Despite a 336 MW increase in onshore wind capacity in the Moray Council area, from 115.6 MW in 2009 to 336.6 MW in 2019[38], tourism visits to the Moray area have been consistently rising, with tourist visits to the area rising above pre-covid levels in 2023 to 877,573[39].

The few cumulative wind farms, either operational, consented, or in planning, are all at substantial distance and represent negligible cumulative additions to impacts on recreational amenity and therefore tourism.

Overall, it is assessed that wind farm development does not have a noticeable effect on tourism, and no cumulative effects from the Development are anticipated.

[38] BiGGAR Economics (2021) Wind farms and tourism 2021. Available at: https://biggareconomics.co.uk/wp-content/uploads/2021/11/BiGGAR-Economics-Wind-Farms-and-Tourism-2021.pdf [Accessed 27/03/2025].
[39] Moray Speyside Tourism (2023) Moray STEAM Infographic 2023. Available at: https://morayspeyside.com/app/uploads/2024/09/Moray-STEAM-Infographic-2023.pdf [Accessed 27/03/2025].

14.9 SUMMARY OF EFFECTS

Table 14.10 provides a summary of the effects detailed within this Chapter; where no effects were identified these are not summarised but detailed in the assessments.

Table 14.10: Summary of Effects

Receptor	Potential Effect	Significance of Effect	Mitigation Proposed	Residual Effect
Construction and Decommissioning Phases				
Local employment	Direct and indirect effects through increase in employment	Minor, positive	None proposed	Minor, positive
Skill development and indirect employment	Indirect and induced employment opportunities and skill development	Minor, positive	None proposed	Minor, positive
Local economy	Capital expenditure within the local area	Minor, positive	None proposed	Minor, positive
Land use	Land take and change of land use	Minor, negative	None proposed	Minor, negative
Recreational routes within the Site	Short-term access restrictions and diversions at times of essential maintenance	Negligible	Access Management Plan	Negligible
Recreational routes within the Study Area	Reduced visual amenity for temporary periods throughout the walks	Negligible	None proposed	Negligible
Tourism and Recreational Receptors within Site	Potential temporary access restrictions and decrease in general amenity due to presence of construction site, potential disruption from construction traffic.	Moderate	None proposed	Minor, negative
Tourism and Recreational Receptors within the Study Area, including accommodation providers	Potential reduced visual amenity due to construction of Development Local shops and accommodation may experience increase in turnover when providing services to contractors	Negligible Minor, positive	None proposed None proposed	Negligible Minor, positive
Operational Phase				
Local employment	Increased employment and business opportunities	Negligible	None proposed	Negligible
Local and regional economy	Operational expenditure to the regional	Negligible	None proposed	Negligible
Land use	Land take and change of land use	Minor, negative	None proposed	Minor, negative
Recreational Routes within the Site	Temporary exclusions to access during times of essential maintenance	Negligible	Access Management Plan	Negligible

Receptor	Potential Effect	Significance of Effect	Mitigation Proposed	Residual Effect
Recreational Routes within the Study Area	Reduced visitor numbers due to presence of wind farm	Negligible	None proposed	Negligible
Tourism and Recreation Receptors within the Site	Increased risk to participants of the Speyside Stages Rally	Moderate	Provision of an earth bank to reduce risk of collision with electrical infrastructure, as part of the Access Management Plan	Minor, negative
Tourism and Recreation Receptors within the Study Area	Reduced visitor numbers	Negligible	None proposed	Negligible

14.10 STATEMENT OF SIGNIFICANCE

The renewables industry is an important economic asset to the UK and Scotland and supports a substantial and growing number of employment opportunities.

Although not significant in terms of the EIA Regulations, the Development will further contribute to the beneficial economic effect of renewable energy, and associated skills base within Scotland.

The establishment of a local community fund will make a valuable contribution to the local community surrounding the Site although not significant in terms of the EIA Regulations.

After mitigation, no significant effects in terms of the EIA Regulations are predicted on socio-economics, tourism and recreation and land-use receptors during the construction, operation or decommissioning phases of the Development.