BiGGAR Economics

Socio-Economic Impact Assessment of Breezy Hill Energy Project

A report to Brockwell Energy Limited
May 2025

BiGGAR Economics

Contents

1. Executive Summary

Scotland has signed up to ambitious climate change targets, with the Climate Change (Emissions Reductions) Act 2019[1] committing Scotland to the reduction of emissions to net zero by 2045. This commitment to a net zero economy is now central to economic policy. This transformation will require an increase in renewable energy generation, to replace other forms of generation and to facilitate the decarbonisation and electrification of the economy.

The development of projects such as Breezy Hill Energy Project (The Proposed Development) offers an opportunity to generate economic impact regionally and nationally while driving the delivery of a more sustainable economy in Scotland.

The Proposed Development could deliver a series of economic benefits during the phases of development, construction, and following operations. In particular, it was estimated that during its development and construction, the Proposed Development could generate:

- £11.5 million Gross Value Added (GVA) and support c.160 years of employment in East Ayrshire; and
- £38.2 million GVA and c.560 years of employment across Scotland.

During its operations and maintenance, each year the Project could generate:

- £1.0 million GVA and support c.8 jobs in East Ayrshire; and
- £2.3 million GVA and c.25 jobs across Scotland.

The Proposed Development will also contribute to public finances through the payment of non-domestic rates, which could amount to approximately £1.2 million annually, or £48.0 million over a 40-year operational lifetime. This will support the funding of local public services in the context of challenging public sector finances.

To support local ambitions and needs, it has become common practice for onshore wind projects to offer community benefit funding, with Scottish Government guidance suggesting £5,000 per annum per installed MW. This level of funding would generate around £0.5 million every year for the local economy, equivalent to £20.0 million (not including indexation) over the lifetime of the wind farm.

Over time, research evidence has consistently found that there is no relationship between onshore wind developments and tourism activity in Scotland. In 2021, BiGGAR Economics produced a report analysing the relationship between the construction of onshore wind farms and tourism employment at the local, regional and national level.[2] The report concluded that there was no pattern or evidence suggesting that the development of onshore wind farms in Scotland had any

[1] Scottish Government (2019), Climate Change (Emissions Reduction Targets) (Scotland) Act 2019
[2] BiGGAR Economics (2021), Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms

negative effects on the tourism economies of the country as a whole, local authority areas or the immediate areas surrounding wind farms.

An assessment has also been undertaken focusing on tourism assets that are located within 15km of the Proposed Development. It found that the wind farm proposals are not expected to affect the local accommodation providers, recreation trails and tourism attractions.

The creation of the Proposed Development can make a significant contribution to Scotland's economic strategy, which is now being driven by climate change commitments and deliver a range of local economic and community benefits, without any adverse effects on other aspects of the economy, such as tourism.

As well as generating economic impacts regionally and nationally, Brockwell Energy Limited's commitment to ensuring the local community benefits from the Proposed Development would support wider economic and social impacts. By committing to prioritising local contractors, the Proposed Development will support local economic development and enable the community to support projects and address the priorities of the area. On this basis, it can be concluded that the Proposed Development maximises net economic impact.

2. Introduction

BiGGAR Economics was commissioned to assess the potential economic impact associated with Breezy Hill Energy Project.

2.1 Background

Breezy Hill Energy Project (the Proposed Development) is a proposed project located approximately 13km south-east of Ayr in East Ayrshire. It is expected that the Proposed Development would be comprised of 20 turbines, each with a generating capacity of up to 5 MW per turbine, resulting in a total installed capacity of approximately 100 MW, and the provision of a battery energy storage system (BESS) with an indicative capacity of 40 MW.

The objectives of this study include:

- contributing to existing analysis by quantifying the potential economic impacts of the wind farm;
- assessing the potential for any effects on the local economy such as changes to tourism activity as a result of the Proposed Development;
- outlining the potential benefit for the local community and contribution to the wellbeing; and
- assessing the alignment with the NPF4 Policy 11(c) requirements.

2.2 Report Structure

The report is structured as follows:

- Section 3 places the development in the context of national and regional economic strategies;
- Section 4 provides a socio-economic context;
- Section 5 describes the assessment methodology used;
- Section 6 considers the economic impact from the Proposed Development;
- Section 7 sets tourism in the area in context and considers the relationship between the proposed wind farm and the local tourism economy;
- Section 8 considers potential community and wider benefits; and
- Section 9 contains a conclusion on net economic benefit.

3. Strategic Context

This section considers national, regional and local strategies and how the Proposed Development supports their delivery.

3.1 National Strategic Context

3.1.1 Scotland's National Performance Framework

The National Performance Framework[3] 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 explicitly includes 'increased well-being' as part of its purpose and combines measurement of how well Scotland is doing in economic terms with a broader range of well-being measures. 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

[3] Scottish Government (2023), Scotland's National Performance Framework.

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;
- **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.

The Proposed Development could contribute to the achievement of the national outcomes set out in the National Performance Framework. Investment in renewable energy can increase productivity in the economy and by creating jobs in the local area the Proposed Development will contribute to inclusive growth. It also supports sustainability and the transition to Net Zero, by increasing the generation of renewable energy.

3.1.2 Programme for Government 2024-25: Serving Scotland

Published in September 2024, the Programme for Government[4] 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

[4] Scottish Government (2024), Programme for Government 2024-25: Serving Scotland.

importance of creating the right enabling environment to support businesses which generate jobs and wealth for communities.

3.1.3 Green Industrial Strategy

The Green Industrial Strategy[5], 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.

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 for working collaboratively with partners to maximise economic benefit from the opportunities created by the global transition to Net Zero.

As the largest contributor to Scotland's renewable electricity generation, maximising the wind economy is a key component of this strategy.

3.1.4 Scotland's National Strategy for Economic Transformation

In March 2022, the Scottish Government published the National Strategy for Economic Transformation[6], 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, which delivers prosperity for all Scotland's people and places. Of particular importance is the ambition to be greener, with a just transition to net zero, a nature-positive economy and a rebuilding of natural capital.

To deliver its vision and address the economy's challenges, five programmes of action have been identified (with a sixth priority of creating a culture of delivery), 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;

[5] Scottish Government (2024), Green Industrial Strategy.
[6] Scottish Government (2022), Scotland's National Strategy for Economic Transformation

- 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.

The strategy notes that Scotland has substantial energy potential and that it has developed a growing green industrial base. This provides a strong foundation for securing new market opportunities arising from the transition to Net Zero and will need continuing investment and support. Renewable energy also has a role to play in supporting productive businesses and regions across Scotland.

3.1.5 National Planning Framework 4

The Fourth National Planning Framework (NPF4)[7] 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, including onshore wind and energy storage, 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".* The Proposed Development will support employment and create opportunities for local businesses at both the construction, operation and maintenance phases. The assessment includes a conclusion on whether this project maximises the net economic impact in the context of NPF4 Policy 11(c).

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, Section 8 of this report does consider whether there could be any implications for tourism.

3.1.6 Onshore Wind Sector Deal

The Onshore Wind Sector Deal[8], published in September 2023, outlines the commitment from the Scottish Government and the onshore wind sector to reach 20 GW of onshore wind by 2030, ensuring maximisation of benefits to Scotland. The Deal highlights the increased potential of onshore wind for a low-carbon and prosperous future, the creation of high-quality job opportunities and the empowerment of local communities in Scotland.

[7] Scottish Government (2023). National Planning Framework 4.
[8] Scottish Government (2023). Onshore Wind Sector Deal.

The document emphasises the following aspects, and the collaborative, sector and government action required to support the development of onshore wind in each of the following:

- **supply chain, skills and the circular economy**: support the enhancement of the current skills and training provision to deliver the needs of the wind industry;
- **community**: onshore wind will continue to collaborate with local communities, offering impactful community benefits;
- **land use and environment**: onshore wind projects will enhance biodiversity and optimise land use and environmental benefits;
- **planning**: reduce the time it takes to determine applications for onshore wind projects by increasing skills and resources;
- **legislative and regulatory**: develop evidence to support a strategic approach to delivering investment and transporting wind turbine components, and improve network connections;
- **technical**: enable cooperative coexistence between onshore wind and safe aviation operations; and
- **implementation and governance**: key milestones to be delivered by agreed dates.

Taking these into consideration, the Deal shed light on the importance of onshore wind in accelerating the transition to Net Zero, driving economic growth, creating better job opportunities, and benefitting communities in Scotland. The Proposed Development would directly contribute to all the above increasing onshore wind generating capacity in East Ayrshire and Scotland.

1.1.1 Community Wealth Building

Community Wealth Building (CWB) is an approach to local economic development that aims to keep wealth circulating locally to ensure more inclusive, resilient, and sustainable local economic development. It is a people-centred approach and aims to keep benefits in the hands of local people.[9] It is formed of five pillars:

- 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.

CWB is key to Scotland realising its economic ambitions, with CWB being embedded within various relevant national strategies, such as NSET and NPF4. The Scottish Government have committed to introducing a CWB bill to parliament and, several local authorities including Fife, Glasgow City Region, South of Scotland, and Western Isles, have all piloted CWB.

[9] See Centre for Local Economic Strategies - https://cles.org.uk/community-wealth-building/how-to-build-community-wealth/

In particular, CWB has an important place in NPF4. Policy 25 states that "development proposals which contribute to local or regional community wealth building strategies and are consistent with local economic priorities will be supported."

Therefore, while developers are not required to demonstrate that they are contributing to community wealth building in the communities in which they operate, it is in their interest to do so.

3.1.7 Tourism Strategy: Scotland's Outlook 2030

Following on from the Tourism Scotland 2020 (TS2020) strategy[10], a collaborative network of industry experts created Scotland's Outlook 2030, a strategy document 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[11].

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.

3.2 Regional Strategic Context

3.2.1 The East Ayrshire Local Development Plan 2

[10] Scottish Tourism Alliance (2012), Tourism Scotland 2020.
[11] Scottish Tourism Alliance (2020). Scotland's Outlook 2030

East Ayrshire's second Local Development Plan[12] (LDP2) published by East Ayrshire Council, focuses on a number of strategic priorities, including contributing to net zero targets, stimulating population growth, and driving inclusive economic recovery and growth, over the next 10-20 years.

Under the theme of Energy, Resources and Resilience within the Plan's Spatial Strategy, East Ayrshire Council commits to supporting all forms of renewable energy, and in particular, support for wind energy developments such as the Proposed Development.

To support inclusive economic growth, the Plan recognises the requirement to embed a CWB approach, and in particular encouraging developers to support the local supply chain by committing to buying goods and services locally. Developers are also encouraged to actively engage with the Community Renewable Energy (CoRE) Project and its implementation to deliver low carbon energy solutions.

3.3 Summary of Strategic Context

The Proposed Development is expected to have various socio-economic benefits in line with national and regional strategic policy documents. Through its generation of renewable energy, the project will contribute to the decarbonisation of the Scottish economy and towards Scotland's net-zero target. The Proposed Development will also deliver on some of the issues covered by Scotland's NPF, including the economy, communities, and the environment.

At regional and local level, the Proposed Development will create high-quality employment opportunities, helping to stabilise and grow the population, and generate spend in the local economy. The Proposed Development will also support businesses within the local supply chain, building more sustainable and resilient communities through the diversification of income streams.

[12] East Ayrshire Council (2024). Local Development Plan 2 - Volume 1

4. Maximising Local Economic Benefits

This section considers how Brockwell Energy Limited aims to maximise the local economic benefits generated by the Proposed Development and contribute to CWB.

4.1 Maximising Economic Benefits

Developers can play a transformational role within the communities where they operate and can make an important contribution to their economic development. This fosters a collaborative relationship with the local community and ensures that a lasting legacy of economic development can be created.

Brockwell Energy Limited proposes various commitments which aim to maximise economic benefits to the local area. This section sets out a series of initiatives that the developer would undertake to maximise its local economic impact. Interventions provide a series of overlapping benefits, including:

- providing funding to support local ambitions and needs;
- increasing local resilience;
- strengthening the local business base; and
- delivering skills.

All these benefits can contribute to local strategic goals to attract people to live and work in East Ayrshire, providing sustainable jobs.

Whilst there is currently no guidance on what maximising benefits means, best practice is being established and the sector organisation, Scottish Renewables, intends to publish such guidance in 2025. That guidance is expected to identify a number of principles that can be used to make a judgement on whether Proposed Development is maximising net economic impact. These are expected to include:

- **Bespoke:** every project and every community is slightly different so packages of benefits that are tailored around the needs and capacity of the community in question are likely to generate greater benefits than standardised approach.
- **Innovative:** many of the benefits that have been realised by renewables to date have happened because of innovation at the project level. To maintain this culture of continuous improvement it is important that developers to continue to innovate.

- **Collaborative:** many of the benefits of renewable energy developments are not directly within the gift of developers. They will require input and support of others in the public, private and third sector to realise, making a collaborative approach essential.
- **Transparent:** effective collaboration requires the parties involved to trust each other and an open and transparent approach is crucial for establishing this trust.
- **Flexible:** a lot can change between project inception and completion, and these changes can make a big difference to the benefits ultimately realised. A flexible approach that responds positively to such changes is therefore important.

These principles highlight that in considering whether the Proposed Development maximises net economic impacts, it is necessary to consider both the economic impacts that are expected and the approach that Brockwell Energy Limited is taking to ensuring these benefits are consistent with community needs.

The focus of this assessment is on proposed approaches across supply chain engagement, skills development, and community empowerment.

4.2 Commitments and Specific Activities

The specific actions that Brockwell Energy Limited has already taken, or will commit to take, as the Proposed Development progresses are discussed in this section for the three main areas of:

- Supply chain;
- Skills and workforce development; and
- Community empowerment

This section outlines the actions Brockwell Energy Limited will take to maximise net economic benefit from the project across all three areas in a way that is bespoke, innovative, collaborative, flexible and transparent.

4.2.1 Supply Chain

The supply chain in East Ayrshire is accustomed to the development of onshore wind projects. There are currently around 300MW of onshore wind that is under construction (North Kyle Energy Project and Enoch Hill Wind Farm) and a further 300 MW that is currently operational. Maximising the net economic impact through the supply chain in East Ayrshire will therefore require Brockwell Energy Limited to build on the experiences local companies have had with the sector so far and address any barriers that have been identified in other projects.

Brockwell Energy Limited has already, or is committed to, the following activities and policies:

Bespoke

- **Tailored Approach to Local Procurement:** Over eight years of developing, procuring, and constructing the North Kyle Energy Project, Brockwell Energy

Limited has gained a deep understanding of the local business landscape. This knowledge allows for a procurement strategy that is responsive to local capabilities and strengths. Brockwell Energy Limited has actively worked to ensure that local suppliers and businesses are prioritised in the supply chain wherever possible, fostering economic growth within the community. This approach has resulted in most of Brockwell Energy Limited's consulting companies being based in, or have offices in, Scotland.

- **Commitment to Responsible Sourcing:** Brockwell Energy Limited has a Supply Chain and Procurement Policy that ensures responsible sourcing, ethical procurement, and alignment with values of sustainability, integrity, and respect for human rights. Whilst still in draft, Brockwell Energy Limited's Community Engagement Policy outlines a commitment to prioritising local employment, fostering job creation, and supporting skills development in the areas where it operates.

Innovative

- **Breaking Down Barriers for Local Businesses:** Brockwell Energy Limited recognises that smaller firms often face challenges in securing contracts associated with large-scale projects and face a number of challenges competing with larger firms. Brockwell Energy Limited is committed to collaborating with small businesses to overcome these barriers and prioritise the local supply chain where possible.
- **Proactive Local Supply Chain Integration:** Brockwell Energy Limited's approach to procurement encourages its main contractors (including Jones Bros and Vestas) to prioritise local suppliers and workforce participation. In response to this, Jones Bros held several 'meet the buyer' events in Dalmellington, New Cumnock, and St Johns Town of Dalry, before construction took place for the North Kyle Energy Project, setting a precedent that will be continued for the Proposed Development.

Collaborative

- **Engaging with Contractors and Local Businesses:** Brockwell Energy Limited will remain actively involved in the procurement process for the Proposed Development, ensuring that main contractors engage with local suppliers and businesses. This approach will include regular reporting on local content, allowing for ongoing improvement where possible. This is in line with the wider sector commitments made as part of the Onshore Wind Sector Deal.

Transparent

- **Clear Reporting and Accountability:** Brockwell Energy Limited's Tier 1 procurement process includes the publication of the Community Engagement Policy and Supply Chain Policy, ensuring transparency in how contracts are awarded and how community benefits are structured.
- **Impact Evaluation**: Brockwell Energy Limited has committed to quantifying and evaluating the impact of its supply chain activities and that of its Tier 1 suppliers. It is anticipated that this evaluation will occur at the end of the construction period, to capture the impact during this stage. Brockwell Energy Limited will

feed back the findings of this evaluation to stakeholders and will contribute to the supply chain reporting requirements which form part of the Onshore Wind Sector Deal.

Flexible

- **Adaptable Procurement and Contracting**: Brockwell Energy Limited ensures that where it can contract directly with small businesses, it does so in a way that makes it easier for local enterprises to participate. For example, the Applicant's communications services for the North Kyle Wind Farm are provided by an East Ayrshire-based company, demonstrating a preference for local suppliers where possible.
- **Evolving Targets for Local Content**: By monitoring and benchmarking local content, Brockwell Energy Limited will continue to adjust procurement strategies to increase support for the local supply chain and ensure that the benefits of the Proposed Development continue to be maximised for the local community.

4.2.2 Skills and Workforce Development

Recent analysis by ClimateXchange[13] have identified that East Ayrshire will have one of the highest levels of demand for workforce in the onshore wind sector and that it is expected to peak in 2027, in line with the peak employment requirements for the Proposed Development. The development of the workforce in East Ayrshire is therefore crucial for not only the maximisation of benefits to the local area, but also to the time frames of the Proposed Development itself.

Skills development commands a collaborative response. The training and education required is likely to be delivered by local colleges, schools and universities. The individuals who are trained or upskilled are likely to benefit from the strong pipeline of work that will be available in the onshore wind sector in East Ayrshire and move from development to development as the projects move through different phases of work. Therefore, the costs and benefits from any skills support are likely to be realised across the sector, which is why collaboration is the key theme within the skills development sections of the Onshore Wind Sector Deal.

However, Brockwell Energy Limited can, and will, act on an individual basis to ensure that it is a key driver of collaboration on skills in the area and ensure that the recruitment, training and employment activities that are supported by the Proposed Development represent best practice in the industry.

Brockwell Energy Limited has already, or is committed to, the following activities and policies:

Bespoke

- **Attendance at Local Careers Fairs:** A part of the commitment to local employment Brockwell Energy Limited commits to engaging with local groups and job seekers by attending local careers fairs. This approach ensures that

[13] ClimateXchange (2024) Mapping the current and future workforce and skills requirements in Scotland's onshore wind industry

employment opportunities within the project are accessible to the local workforce.

Collaborative

- **Engaging with Local Authorities for Skills Development:** Brockwell Energy Limited was invited to East Ayrshire Council's CoRE Board Meeting in May 2024 to share insights gained from working with the local community on the North Kyle Energy Project. Brockwell Energy Limited provided practical feedback on the skills required in the renewables sector and contributed to discussions on addressing regional skills gaps. This collaboration helps bridge the gap between industry, government, and local communities, ensuring renewable energy projects, such as the Proposed Development, generate long-term benefits for local communities.
- **Supporting Local Authorities to Develop Training Facilities**: To help to encourage and facilitate technical education and training within East Ayrshire, Brockwell Energy Limited is also actively supporting the development of a 'Centre of Excellence' facility, a primary focus of CoRE, with the primary function of enhancing skills, providing training and STEM education to address the regional skills shortage and create a pipeline of employment opportunities for the local communities.
- **Encouraging Local Employment and Investment:** Brockwell Energy Limited will encourage contractors to prioritise the local workforce where possible, ensuring that employment opportunities are generated within East Ayrshire. This will include requiring local workforce metrics to be reported on throughout its supply chain.
- **Apprenticeships and Upskilling Opportunities:** Brockwell Energy Limited is committed to creating apprenticeships and training programs to equip local residents with skills needed in the renewables sector. This includes collaborating with local colleges, supporting on-the-job training, and working with contractors to integrate apprenticeships into project development.

Transparent

- **Commitment to Fair and Inclusive Hiring:** Brockwell Energy Limited adheres to best practice through its Recruitment, Diversity, Inclusion, and Equal Opportunities policies and expects the same from its contractors. Tier 1 contractors are required to provide their own policies as part of the tender process, ensuring transparency and accountability in workforce hiring and management.
- **Living Wage:** Brockwell Energy Limited is committed to supporting the Living Wage and fostering an inclusive and equitable workplace.

4.2.3 Community Empowerment

Brockwell Energy Limited has a strong track record of embracing community empowerment and engaging with local communities to maximise the benefits of community funding. Set up by Brockwell Energy Limited, the 9CCG (a group of nine local community councils working together for collective benefit) provides a platform

to coordinate the funding from several schemes, empowering the community to maximise the benefits and opportunities associated with community benefit funding.

In the case of the Proposed Development, Brockwell Energy Limited is embracing the 9CCG platform to empower the community to have autonomy over how this funding is spent, and therefore the impact that this funding will have. Brockwell Energy Limited will also proactively support the community in how funds are structured and will act beyond the community benefit fund to empower and create assets that can be utilised by those who will live closest to the Proposed Development.

Brockwell Energy Limited has already, or is committed to, the following activities and policies:

Bespoke

- **Community-Driven Approach:** Brockwell Energy Limited recognises the importance of engaging with local communities and ensuring that economic benefits are tailored to their specific needs. By holding exhibitions close to the nearest settlement (Rankinston) and extending outreach through newspaper advertisements, mail drops to 400 local residents, and word of mouth, Brockwell Energy Limited has prioritised accessibility and inclusivity.
- **Enhancing Local Capacity Through Funding Support:** As part of the 9CCG (a group of nine local community councils working together for collective benefit), Brockwell Energy Limited encourages local stakeholders to apply for funding opportunities. By supporting communities in preparing funding applications and identifying beneficial projects, Brockwell Energy Limited is enabling the local community to secure financial resources for economic and social development.
- **Restoration and Land Reuse for Economic Benefit:** Brockwell Energy Limited has a track record of transforming former industrial sites into valuable community assets. The restoration efforts at North Kyle serve as a model for the Proposed Development, ensuring that land is repurposed effectively, creating opportunities for local businesses, and supporting long-term economic sustainability.
- **Addressing Local Infrastructure and Living Conditions:** As outlined as an area of focus in the Strategic Plan published by the 9CCG[14], the community is actively considering initiatives such as broadband improvements and warmer housing solutions. These efforts align with previous successful projects, reflect an adaptive approach to addressing evolving community needs and are being supported by Brockwell Energy Limited.
- **Community-Led Development:** If supported by the landowner and local community, Brockwell Energy Limited has proposed that funding from the Proposed Development could facilitate the development of a Destination Visitors' Centre and recreational facility, with construction potentially starting as early as the end of 2026. The design, planning, procurement, and operation of

[14] The 9CC Group (2022), A Strategic Plan for the 9CC area of Cumnock and Doon Valley

this facility is expected to be independently managed by a social enterprise, ensuring long-term benefits are retained within the local community.

Innovative

- **Community-Led Decision-Making:** Brockwell Energy Limited adopts an innovative governance model by actively involving local communities in the management and decision-making processes. This collaborative approach ensures that those directly affected by the project have a voice in shaping its development, fostering local ownership and long-term support.
- **Early Investment for Environmental Enhancement**: Rather than waiting until project completion, Brockwell Energy Limited has committed significant funds at the final investment decision stage to facilitate early land improvement. This proactive funding model allows for the immediate restoration of areas affected by past open-cast mining and maximises long-term environmental benefits.
- **Strategic Partnerships for Sustainable Land Use:** By collaborating with East Ayrshire Council and Forestry & Land Scotland, Brockwell Energy Limited ensures that restoration efforts extend beyond the Proposed Development itself. The planned planting of broadleaf woodlands contributes to carbon sequestration, biodiversity enhancement and the creation of sustainable local green spaces, demonstrating a forward-thinking approach to land management.

Collaborative

- **Establishment of the 9CCG for Collective Benefit:** As part of the 9CCG, Brockwell Energy Limited ensures that communities have an active role in the decision-making process, enabling Brockwell Energy Limited to better align the benefits from the Proposed Development with the specific needs of the community.
- **Early and Ongoing Financial Support:** Brockwell Energy Limited became the first wind farm developer in Scotland to provide community funding ahead of a sites operational phase (North Kyle Energy Project). Brockwell Energy Limited provided £200,000 in initial funding to help establish the 9CCG's governance processes, hire staff and run five pilot projects to test governance. This was followed by a commitment to five "boost funding" payments of £628,000 after the 9CCG's launch in October 2023, two of which have already been paid. These amounts are over and above the standard £5,000 per MW per annum of community benefit and were set up to allow the 9CCG to start to issuing funding commitments head of the normal community benefits flowing after commissioning. In doing this, Brockwell Energy Limited set a precedent for proactive community investment. Following this approach, Brockwell Energy Limited is proposing to make the first ten years of community benefit funding available on day one of construction of the Proposed Development, to enable the delivery of a visitor hub located in the North Kyle Forest to attract tourists and visitors.
- **Coordinated Consultation for Long-Term Community Impact:** Recognising the inefficiencies of developers running independent consultation processes, Brockwell Energy Limited advocates for a collaborative, centralised approach

through the 9CCG. This strategy ensures that funding decisions are optimised for long-term benefits that genuinely serve local communities.

- **Enabling Communities to Secure Long-Term Wind Farm Benefits:** As part of the 9CCG, Brockwell Energy Limited has helped communities to coordinate their efforts and secure over £150 million in community benefit funds over the next 40 years. This collaboration has helped to generate substantial and long-term funding to enable communities to effectively address regional challenges.
- **Setting Industry Standards for Community Engagement:** Brockwell Energy Limited has contributed to setting and upholding industry standards for community engagement through coordinating community benefit strategies, engaging with local businesses to overcome barriers, and actively monitor local procurement.
- **Community Volunteering Opportunities:** Brockwell Energy Limited is dedicated to exploring and supporting local community volunteering initiatives as part of its broader commitment to social responsibility. Through encouraging staff participation and collaborating with local organisations, Brockwell Energy Limited aims to support local causes and contribute to meaningful social and environmental projects in the areas surrounding its developments.

Transparent

- **Open Access to Information & Publicity:** Brockwell Energy Limited has established a drop-in centre in Dalmellington, ensuring that members of the public have access to information associated with the Proposed Development. To maximise awareness of this resource, Brockwell Energy Limited is committed to further publicising this facility to ensure local residents and stakeholders are able to stay better informed about the latest developments.
- **Encouraging Community Participation:** By providing an easily accessible resource, such as a drop-in centre, Brockwell Energy Limited promotes transparency and ensures that the community has the opportunity to review, understand, and respond, to the plans for the Proposed Development, and ensure they are able to engage in the decision-making process. To further facilitate community participation, Brockwell Energy Limited has also provided phone and email contact details to encourage communication.
- **Adaptive Community Benefit Funding:** Brockwell Energy Limited remains committed to ongoing engagement with local stakeholders and maintaining flexibility around community benefit funding to better meet the needs of the community. This is demonstrated by Brockwell Energy Limited proposing to make the first ten years of community benefit funding from the Proposed Development available from day one of construction to enable the community to deliver a local visitors' centre.

4.3 Summary of Maximising Community Benefits

Brockwell Energy Limited demonstrates a commitment to prioritising the local supply chain where possible, by actively monitoring local content and helping local businesses to overcome barriers in securing contracts for large-scale projects such

as the Proposed Development. Brockwell Energy Limited also encourages their Tier 1 contractors to engage with local suppliers and participate in 'meet the buyer' events in local communities, helping to retain benefits from the Proposed Development within East Ayrshire and maximise net economic benefits in the local area.

To ensure a deeper understanding of local needs, Brockwell Energy Limited actively engages with affected communities, helping to tailor the benefits generated by the Proposed Development in a way that best meets the needs of the local area. Brockwell Energy Limited's community engagement strategies have enabled the development of a proactive funding approach which has since been used by other developers.

Brockwell Energy Limited also contributes to skills development through their collaboration with East Ayrshire Council's CoRE Board to address regional skills gaps in the renewables sector, helping to stimulate collaboration between industry, government, and local communities, and equip the local community with both the capacity and capability to secure contracts associated with the Proposed Development, and retain wealth locally.

By supporting local communities to identify projects and secure funding, Brockwell Energy Limited has also helped to secure £150 million in community benefits over the next 40 years, empowering communities to have autonomy over decisions and effectively address regional and local challenges.

5. Socio-Economic Context

This section discusses the socio-economic context of the Proposed Development, including population structure, economic activity, skills, and relative deprivation.

5.1 Study Areas

The aim of the socio-economic baseline is to set the Proposed Development and its potential for economic benefits within existing socio-economic conditions. This section considers the socio-economic structure of three study areas:

- Local Area (defined as the electoral wards of Cumnock and New Cumnock, and Doon Valley);
- East Ayrshire; and
- Scotland.

5.2 Demographics

5.2.1 Population Estimates

Table 5-1 presents population estimates for the Local Area, East Ayrshire, and Scotland. The data for the local authority and national levels relates to 2023, while the latest population estimates at the electoral ward level are in 2022.

The Local Area had a population of 24,800, accounting for 20.5% of the population in East Ayrshire (120,750), and 0.5% of Scotland's total population of 5,490,100.

In the Local Area, the working-age population (aged 16 to 64) accounted for 60.8% of the population in the region, relatively smaller than the overall population distribution in East Ayrshire (61.4%) and Scotland (63.4%).

The share of the population in the Local Area over the age of 65 was 22.1%, slightly more than that of East Ayrshire (21.8%) and greater than the national average of 20.3%.

Table 5-1: Population Estimates

	Local Area	East Ayrshire	Scotland
Total	**24,800**	**120,750**	**5,490,100**
0-15	17.1%	16.8%	16.3%
16-64	60.8%	61.4%	63.4%
65+	22.1%	21.8%	20.3%

Source: NRS (2024), Mid-2023 Population Estimates. ONS (2023), Population Estimates – Local authority based by five-year age band.

5.2.2 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 2023 to 2043, the population of East Ayrshire is expected to decrease by 5.8%, equivalent to the decline of 7,000 people. During the same period, the population of Scotland is expected to increase by 5.1%, to approximately 5.7 million.

By 2043, the share of the working age population in East Ayrshire is also projected to fall by 3.9 percentage points, from 61.4% to 57.5% (equivalent to a reduction of 8,700 people), whilst the share of the population aged 65+ is projected to rise from 21.8% to 27.0%.

Scotland is predicted to follow a similar but less marked trend. In Scotland, the share of the population aged 16-64 is projected to fall from 63.4% to 61.1% and the share of the population aged 65 and over is projected to increase from 20.3% to 24.8%.

These demographic trends suggest that a declining working-age population will have to support an increasingly ageing population. For this reason, it will be increasingly important for East Ayrshire to attract and retain people of working age.

Table 5-2: Population Projects, 2023-2043

	East Ayrshire		Scotland	
	2023	2043	2023	2043
Total	**120,750**	**113,792**	**5,490,100**	**5,770,152**
0-15	16.8%	15.5%	16.3%	14.1%
16-64	61.4%	57.5%	63.4%	61.1%
65+	21.8%	27.0%	20.3%	24.8%

Source: NRS (2024), Mid-2023 Population Estimates; National Records of Scotland (2020), Population Projections for Scottish Areas (2018-based); NRS (2025), Projected Population of Scotland: 2022 based.

5.3 Industrial Structure

As shown in Table 5-3, in 2023 the highest proportion of employment in the Local Area was in human health and social work activities, accounting for 14.9% of total employment in the region. Employment in this sector was underrepresented compared to East Ayrshire (25.6%) and Scotland as a whole (15.6%).

Of those working in the Local Area, 6.6% were employed in the construction industry, compared to 5.2% in East Ayrshire, and the Scottish average of 5.1%. This sector is one of the primary areas of opportunity for contracts associated with the construction phase of the Proposed Development.

Table 5-3: Industrial Structure

	Local Area	East Ayrshire	Scotland
Human health and social work activities	14.9%	25.6%	15.6%
Wholesale and retail trade	14.0%	14.0%	13.2%
Accommodation and food service activities	13.1%	8.1%	8.6%
Education	11.4%	7.0%	8.2%
Public administration and defence	11.1%	7.0%	6.2%
Construction	6.6%	5.2%	5.1%
Manufacturing	6.1%	5.8%	6.7%
Transportation and storage	5.7%	3.5%	4.5%
Arts, entertainment and recreation	5.3%	2.9%	2.7%
Professional, scientific and technical activities	2.4%	4.1%	7.2%
Administrative and support service activities	2.4%	5.8%	6.8%

Other service activities	2.2%	1.4%	1.7%
Information and communication	1.3%	1.0%	3.1%
Real estate activities	1.3%	0.8%	1.5%
Agriculture, forestry and fishing	0.9%	4.7%	3.4%
Water supply activities	0.9%	2.1%	0.8%
Financial and insurance activities	0.3%	0.8%	3.2%
Electricity, gas, steam and air conditioning supply	0.2%	0.5%	0.8%
Mining and quarrying	0.0%	0.1%	0.9%
Total Employment	**5,700**	**43,100**	**2,657,000**

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

5.4 Economic Activity

The unemployment rate in East Ayrshire was 2.1%, which is below the Scottish average of 3.3%. The economic activity rate in the region was 76.3%, which was slightly lower than across Scotland as a whole (76.6%).

Table 5-4 also shows that the median annual gross wage for residents in East Ayrshire was £37,260, which was lower than the national average of £38,286.

Table 5-4: Labour Market Indicators

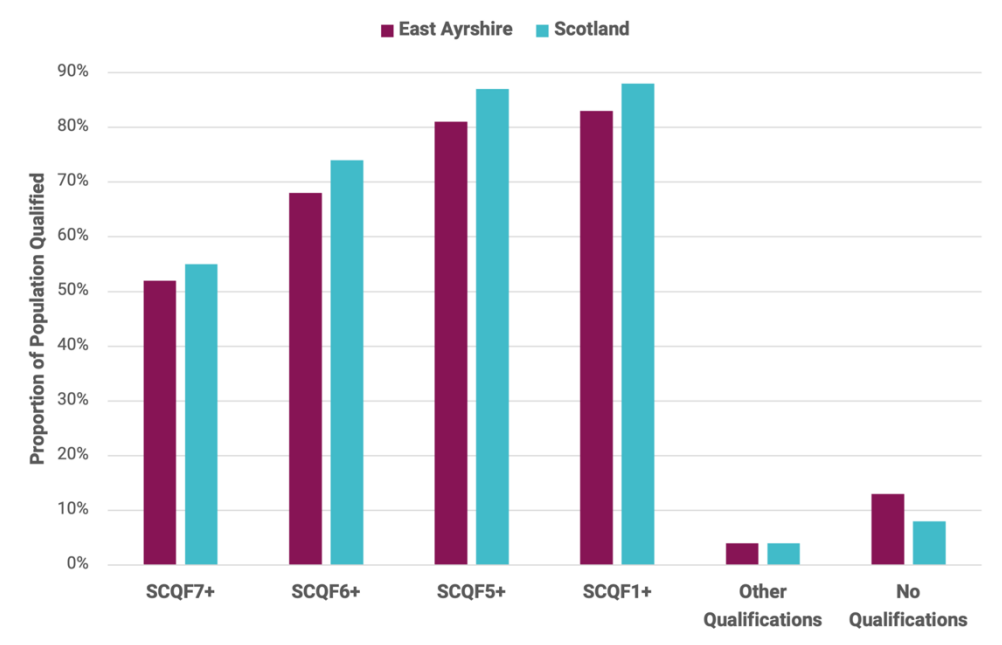
	East Ayrshire	Scotland
Economically Active (%)	76.3%	76.6%
Unemployment Rate (%)	2.1%	3.3%
Median Annual Gross Wage (resident analysis)	£37,260	£38,286

Source: ONS (2025), Annual Population Survey Oct 2023-Sept 2024; ONS (2025), Annual Survey of Hours and Earnings 2024 – resident analysis.

5.5 Education

The workforce in East Ayrshire has lower levels of those with SCQF1+ qualifications and above, than the wider Scottish population. Across East Ayrshire, 51.8% of people have achieved the Scottish Credit and Qualifications Framework level 7 (SCQF7) qualification, equivalent to a higher education certificate. This is lower than the share of people in Scotland of 55.1%, with a higher education certificate. The proportion of people who have achieved no qualifications in East Ayrshire (12.6%) is significantly higher than across Scotland as a whole (8.2%).

Figure 5-1: Qualification Levels



Source: ONS (2024), Annual Population Survey Jan 2023 – Dec 2023.

5.6 Scottish Index of Multiple Deprivation

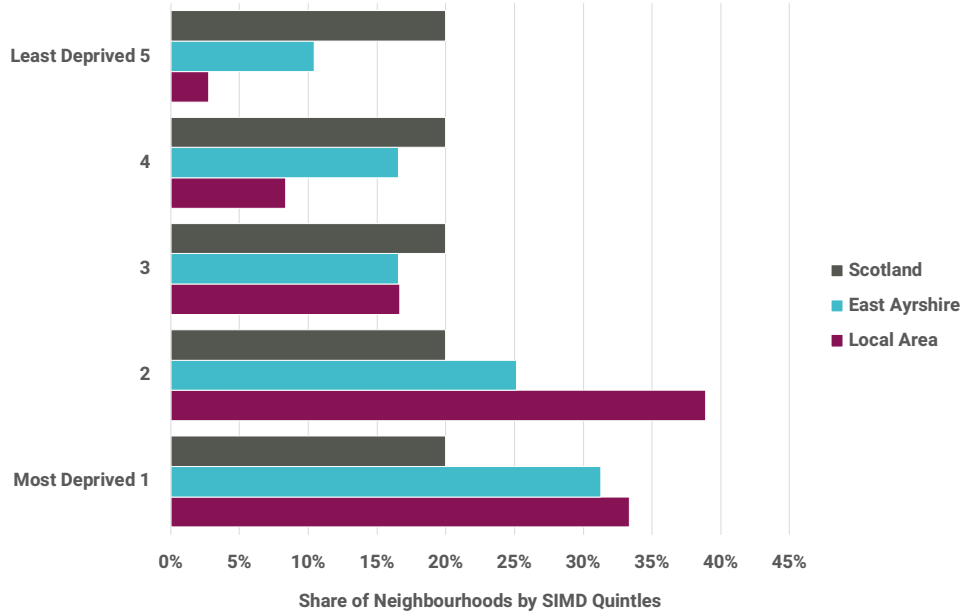
The Scottish Index of Multiple Deprivation (SIMD) is a relative measure of deprivation which ranks small areas across seven dimensions: income, employment, education, health, access to services, crime and housing. These areas can be ranked based on which quintile (fifth of the distribution) they belong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

The Local Area has greater levels of deprivation than either Scotland as a whole or the wider East Ayrshire area. There are 36 small areas in the Local Area, of which 72% are in the two most deprived quintiles, with 33% being in the most deprived and 39% being in the second. With 17% located in the middle of the distribution and 8% being in the fourth quintile, the remaining 3% is in the least deprived quintile.

East Ayrshire is made up of 163 small areas, of which 31% are in the most deprived quintile and 25% are in the second. The third and fourth quintiles both contain 17% of the small areas, with the remaining 10% being within the least deprived quintile.

Greater levels of deprivation in the Local Area presents an opportunity for the Proposed Development to focus efforts on generating positive outcomes for these areas through both its economic activity and wider social initiatives. By targeting the most deprived areas, the project can contribute to reducing inequalities and promoting inclusive growth.

Figure 5-2: SIMD distribution of study areas



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

5.7 Summary of Socio-Economic Context

East Ayrshire is projected to experience an ageing population over the next two decades, and therefore the creation of employment in the region will be important in retaining people of working age, which will be key in supporting an increasingly older population.

Employment in construction is slightly overrepresented in the Local Area and East Ayrshire compared to Scotland as a whole, and the region will likely have the opportunity to benefit from contracts for the construction of the Proposed Development. High-quality and well-paid jobs would also likely benefit the median annual income in the region, which is slightly lower than the Scottish average.

With greater levels of deprivation in the Local Area than in Scotland as a whole, the Proposed Development presents an opportunity to increase economic activity and generate positive outcomes for the region.

6. Assessment Methodology

This section describes the methodology used to assess the economic impact from the Proposed Development as well as the contribution to the maximisation of net economic benefits.

6.1 Economic Impact Methodology

6.1.1 Modelling the Economic Impact of Onshore Wind Farm Developments

The methodology employed to assess the economic impact of onshore wind developments adheres to industry best practice. It leverages research, conducted by BiGGAR Economics in 2015 on behalf of RenewableUK[15], on the construction and operational costs from numerous onshore wind farm projects across the UK. Furthermore, the approach draws on more recent evidence gathered from a multitude of case studies of construction and operational costs in the sector.

The assessment will consider the following sources of economic impact:

- **direct impacts**: the economic value generated through the contracts associated with the Proposed Development;
- **indirect impacts**: the impact from the spending of contractors within their supply chains; and
- **induced impacts**: the impact from the spending of those workers carrying out contracts for the Proposed Development and on behalf of its contractors.

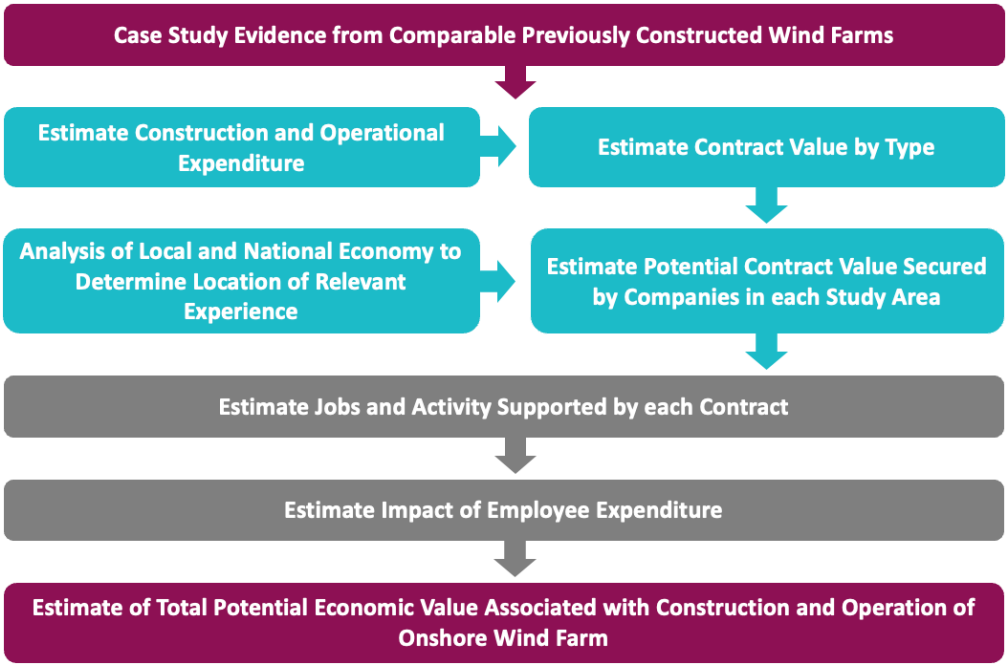
There are four key stages in estimating the value of this activity:

- estimation of the capital and operational expenditure;
- estimation of the value of component contracts that make up total expenditure;
- assessment of the capacity of businesses in the study area to perform and complete component contracts; and
- estimation of economic impact from resultant figures.

This process is illustrated in Figure 6-1.

[15] RenewableUK (2015), Onshore Wind: Economic Impacts in 2014.

Figure 6-1: Approach to Economic Impact



Source: BiGGAR Economics

6.1.2 Measures of Economic impact

The economic impacts are reported with respects to the following measures:

- **Gross Value Added (GVA)**: a commonly used measure of economic output, GVA captures the contribution made by an organisation to national economic activity. This is usually estimated as the difference between an organisation's turnover and its non-staff operational expenditure; and
- **Employment**: this is expressed as years of employment for temporary contracts and as annual jobs for operations and maintenance contracts. Years of employment are used to report the short-term employment that is supported by the construction and development of the wind farm. As an example, a job that lasts for 18 months would support 1.5 years of employment.

6.1.3 Study Areas

The assessment of economic impacts considered the following study areas:

- East Ayrshire; and
- Scotland.

6.2 Maximisation of Net Economic Impact: Approach

There is no specific legislation, policy or guidance available on the methods that should be used to assess the socio-economic impacts of a proposed onshore wind farm development. The assessment focuses on evaluating whether the Proposed

Development meets the specific requirements outlined in NPF4 Policy 11(c) concerning the maximisation of net economic impacts.

However, there is also no guidance on maximising net economic impact in the context of the NPF4. The structured approach provided below ascertains the net economic impact of the onshore wind development through the following aspects:

- **alignment with policy statements**: Clarity on the desired outcomes can be obtained from other policies such as Onshore Wind Policy Statement and the Onshore Wind Sector Deal for Scotland which identify the collective vision to use the rapid development of the onshore wind sector to drive long-term economic growth, create high-quality supply chain opportunities, reduce carbon emissions, and ultimately benefit the communities in Scotland.
- **evaluation of commitments**: Commitments made by Brockwell Energy Limited regarding economic contributions, including investments, job creation, and support for local businesses and communities, form an important component of the evaluation process.
- **consideration of control**: There are factors within and outside the control of Brockwell Energy Limited that may affect the realisation of the socio-economic benefits. For example, benefits from the commitment of Brockwell Energy Limited to local suppliers will only be realised if local suppliers utilise the opportunities provided.

Based on the above, the following criteria are considered for the maximisation of the net economic benefits from onshore wind development:

- **rapid deployment** of projects needed to deliver Scotland's 20GW target of onshore wind installed capacity by 2030;
- **high local supply chain content** to maximise the value of local expenditure;
- **bespoke opportunities for local employment and skills development** that reflect the characteristics of the local labour market;
- **fair contributions to the cost for enabling infrastructure** and other interventions necessary to support the sector;
- **fair community benefit packages** that generate tangible benefits for the host community while remaining affordable for the developer; and
- **continued innovation** to support the process of continuous improvements, including opportunities for community ownership, recreational use of site infrastructure, electricity discount schemes, non-cash benefits, community-led housing development, training.

The assessment concludes on whether the Proposed Development maximises the net economic impact in the context of NPF4 Policy 11(c) based on these criteria.

7. Economic Impact

This section estimates the economic impact of the construction and operation of the Proposed Development.

7.1 Development and Construction

The assessment of the economic impact arising from the development and construction of the Proposed Development utilises the extensive work that BiGGAR Economics has carried out in the onshore wind sector. This includes an evaluation of existing wind farm developments carried out in 2015 by BiGGAR Economics on behalf of RenewableUK. The analysis has been updated over time drawing on evaluations of individual wind farm developments and on experience with developers working across Scotland. This body of research and experience provides evidence to estimate costs per MW based on a development's number of turbines and its capacity. For the battery storage components of the Proposed Development, capital expenditure was estimated based on the capital costs of these technologies per MW of generating capacity.

The Proposed Development is expected to have 20 turbines, each with a total generating capacity of up to 5 MW, and the installation of a BESS with a capacity of 40MW. It was estimated that the total development and construction expenditure would be £120.3 million. The expenditure was split according to the following component contracts:

- development and planning;
- turbine;
- balance of plant;
- grid connection; and
- battery storage.

The greatest expenditure component was associated with turbines, equivalent to £57.7 million, or 48% of total development and construction spend. The following largest expenditure was associated with the balance of plant contracts, amounting to £25.5 million (21% of total expenditure). Battery storage could account for 17% of total expenditure, with development and planning accounting for 8%, and grid connection accounting for 7% of spending.

Table 7-1: Development and Construction by Contract Type

	% CAPEX	Value (£m)
Development and Planning	8%	9.2
Turbines	48%	57.7
Balance of Plant	21%	25.5
Grid Connection	7%	7.9
Battery Storage	17%	20.0
Total	**100%**	**120.3**

Source: BiGGAR Economics Analysis of case study evidence from comparable previously constructed wind farms. Note: Totals may not sum due to rounding.

In assessing the economic impacts arising from the development and construction of the Proposed Development, it was necessary to make assumptions on the ability of businesses within each study area to carry out contracts.

Based on the evidence from similar developments within East Ayrshire, it was estimated that approximately 37% of the Proposed Development's contracts will be carried out by Scottish businesses, with a value of £44.0 million. It was estimated that spending on businesses based in East Ayrshire would be approximately £16.4 million equivalent to 14% of total development and construction expenditure.

The greatest opportunity for Scottish businesses is expected to be in contracts associated with the balance of plant, which would be worth up to £22.6 million. Balance of plant contracts are also likely to be the largest opportunity for businesses in East Ayrshire, worth up to £8.8 million.

Table 7-2: Development and Construction Expenditure by Study Area

	East Ayrshire		Scotland	
	%	£m	%	£m
Development and Planning	35%	3.2	75%	6.9
Turbines	2%	1.2	10%	5.5
Balance of Plant	34%	8.8	89%	22.6
Grid Connection	35%	2.8	73%	5.7
Battery Storage	2%	0.4	16%	3.2
Total	**14%**	**16.4**	**37%**	**44.0**

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

Having estimated the size of the contracts that could benefit each of the study areas, it was possible to estimate the Gross Value Added (GVA) and short-term employment that these are likely to support. This was done by splitting each contract

category into its component contracts and assigning each to an industrial sector, based on its Standard Industrial Classification (SIC)[16] code. Direct GVA was then estimated by applying the relevant turnover per GVA from the UK Annual Business Survey (ABS) [17].

It was estimated that the development and construction of the Proposed Development is likely to generate £9.1 million direct GVA in East Ayrshire and £22.3 million direct GVA in Scotland.

Table 7-3: Development and Construction, Direct GVA by Study Area (£m)

	East Ayrshire	Scotland
Development and Planning	2.2	4.2
Turbines	0.6	2.8
Balance of Plant	4.8	11.2
Grid Connection	1.3	2.5
Battery Storage	0.2	1.5
Total	**9.1**	**22.3**

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

Similarly, it was feasible to estimate the number of direct jobs supported by spending in construction and development contracts. This was achieved by dividing the expenditure in each contract by the turnover per job ratio for the relevant sector. It was estimated that the development and construction of the Proposed Development will generate 120 direct years of employment in East Ayrshire and 340 direct years of employment in Scotland.

Table 7-4: Development and Construction, Direct Employment by Study Area, and Contract Type (Years of Employment)

	East Ayrshire	Scotland
Development and Planning	10	40
Turbines	20	60
Balance of Plant	70	170
Grid Connection	20	50
Battery Storage	<10	30
Total	**120**	**340**

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

[16] Office for National Statistics (2009), Standard Industrial Classification of industrial Activities (SIC 2007).

[17] Office for National Statistics (2020), Annual Business Survey 2018 - Revised.

Expenditure in development and construction contracts is also expected to generate 'knock-on' effects across the economy. Specifically, it will be associated with further rounds of expenditure along the supply chain and with the spending of the wages and salaries of those involved in the development and construction of the Proposed Development. These are referred to as 'indirect' and 'induced' impacts.

To estimate indirect and induced impacts, it was necessary to apply the relevant Type 1 and Type 2 GVA and employment multipliers from the Scottish Government Input-Output Tables[18] to direct GVA and direct employment. Since the multipliers refer to sectoral interactions occurring at the level of the Scottish economy, it was necessary to adjust them when considering impacts taking place in East Ayrshire.

By combining the direct, indirect, and induced impacts it was estimated that the development and construction of the Proposed Development will generate:

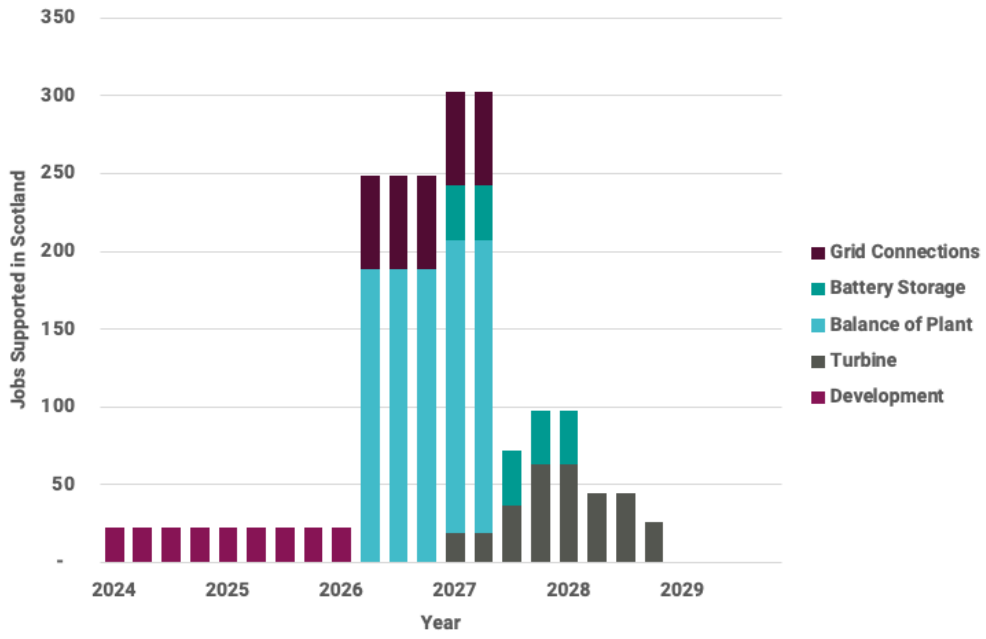
- £11.5 million GVA and 160 years of employment in East Ayrshire; and
- £38.2 million GVA and 560 years of employment in Scotland.

The estimated figures show that the Proposed Development would contribute to the provision of high-quality local employment opportunities during the Development and Construction phase and help maximise the value of local expenditure. These are in line with the requirements of the NPF4 Policy 11(c).

The employment impacts in Scotland will peak during the construction phase, in particular, during the initial balance of plant works. It is estimated that during this phase up to 300 jobs will be supported across the Scottish economy.

[18]Scottish Government (2020), Supply, Use and Input-Output Tables.

Figure 7-1: Employment impacts in Scotland over Time



Source: BiGGAR Economics Analysis

7.2 Operation and Maintenance (O&M)

The initial stage in determining the economic impact stemming from the operations and maintenance of the Proposed Development involved assessing the annual total expenditure necessary for its operation. Based on the number of turbines, the capacity of the turbines, and the battery storage, it was estimated that the annual cost of operations and maintenance (OPEX) is likely to amount to approximately £3.3 million.

It was further assumed that businesses in East Ayrshire could benefit from a total £1.5 million in operations and maintenance contracts (44% of OPEX) annually, and that annual expenditure in Scottish contractors could be up to £2.7 million (84% of OPEX).

Table 7-5: Operations and Maintenance Expenditure by Study Area

	East Ayrshire		Scotland	
	%	£m	%	£m
Operations and Maintenance	44%	£1.5	84%	£2.7

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

The total turnover generated in each study area was then divided by the turnover per GVA and turnover per job ratios of the sectors expected to carry out operations and

maintenance contracts. In this way, it was estimated that the Proposed Development is likely to generate £0.8 million direct GVA and 6 direct jobs in East Ayrshire, and £1.4 million direct GVA and 14 direct jobs across Scotland.

As with the development and construction of the Proposed Development, it was necessary to estimate the indirect and induced impacts associated with operations and maintenance contracts. This was done by applying the relevant Type 1 and Type 2 GVA and employment multipliers.

By combining the direct, indirect, and induced impacts it was estimated that the operations and maintenance of the Proposed Development will generate:

- £1.0 million GVA and 8 jobs in East Ayrshire; and
- £2.3 million GVA and 25 jobs in Scotland.

Similarly to the Development and Construction phase, the estimated figures show that the Proposed Development would contribute to the provision of high-quality local employment opportunities and help maximise the value of local expenditure throughout its operational lifetime. These are in line with the requirements of the NPF4 Policy 11(c).

7.3 Non-Domestic Rates

The Proposed Development is expected to generate a stream of revenue to East Ayrshire through the annual payment of non-domestic rates. The Proposed Development would be liable for non-domestic rates, the payment of which would contribute directly to public sector finances and infrastructure investments supporting the requirements of the NPF4 Policy 11(c).

To estimate the economic impact generated by non-domestic rates, it was first necessary to consider the rateable value of the development and apply the appropriate poundage rate. This was done by applying guidance developed by the Scottish Assessors Association[19] to information about the performance of the Proposed Development.

Using this approach, it was projected that over its operational period, the Proposed Development is expected to make an annual contribution of approximately £1.2 million to public finances. Across its 40-year operational lifespan, this contribution towards non-domestic rates is anticipated to accumulate to around £48.0 million.

[19] Scottish Assessors Association (2023). Practice Note 2: Valuation of Onshore Wind Turbines

8. Tourism and Recreation

This section sets out the tourism context, including the size of the tourism economy and a baseline of attractions in the area, and considers the impact of the Proposed Development on tourism and recreation.

8.1 Local Tourism Context

8.1.1 Sustainable Tourism and GVA Employment

In its 2015 economic strategy[20] the Scottish Government identified six sectors as growth sectors, that is, economic sectors where Scotland had a comparative advantage. Sustainable tourism was one of the sectors identified.

As shown in Table 8-1, 3,000 individuals in East Ayrshire were employed in the sustainable tourism sector in 2022. Sustainable tourism employment in East Ayrshire has increased by 33.3% since 2020, returning to pre-COVID-19 pandemic figures.

In 2022, the sector generated £29.7 million Gross Value Added (GVA) in East Ayrshire, accounting for 0.6% of the total £4.8 billion GVA generated by the sector across Scotland as a whole.

Table 8-1: Sustainable Tourism: Employment and GVA, 2022

	East Ayrshire	Scotland
GVA (£m)	29.7	4,803.3
Employment	3,000	229,000

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

8.1.2 Visitors

Tourism data was not available for the Local Area, however a range of statistics are available on visitor numbers and visitor spend for East Ayrshire and Arran, and Scotland, including the Great Britain Tourism Survey and the International Passenger Survey. These can be used to can be used to form a view of more localised trends.

Table 8-2 shows the latest data available on visitors and level of spending across Scotland. In 2023, Ayrshire and Arran attracted 705,000 domestic overnight visitors, who spent an average of approximately £200 per visit, amounting to a total of £142

[20] Scottish Government (2015), Scotland's Economic Strategy.

million. This accounted for 4.8% of the total spend in Scotland from domestic overnight visits in 2023.

Ayrshire and Arran also attracted 64,000 international overnight visitors in 2023, accounting for 1.8% of all international overnight visitors to Scotland and contributing £33 million in spending.

Table 8-2: Visits and Visitor Spending, 2023

	Ayrshire and Arran	Scotland
		Visitor Numbers (million)
Domestic Overnight Visitors	0.7	12.4
International Overnight Visitors	<0.1	3.5
Total	**0.8**	**160.9**
		Spend (£ million)
Domestic Overnight Visitors	142.0	2,989.3
International Overnight Visitors	33.0	2,458.6
Total	**175**	**10,635**

Source: Kantar (2023) Great Britain Tourism Survey, ONS (2023), International Passenger Survey.

8.1.3 Regional Attractions

The most visited attractions in Ayrshire are shown in Table 8-3Table 8-3. Of these attractions, 4 are located within 15km of the Proposed Varied Development, all of which are clustered around Alloway and Ayr.

Table 8-3: Top Attractions in Ayrshire

Attraction	Annual Visitors	Distance to Site (km)
Rozelle House	13,676	14km
Robert Burns Birthplace Museum	261,283	14km
Maclaurin Galleries	40,066	14km
Burns Monument Centre	6,833	14km
Culzean Castle and Country Park	333,965	23km
Dundonald Castle	24,718	23km
Dean Castle Country Park	1,365,246	25km
Scottish Maritime Museum	73,310	29km

Source: Visit Scotland (2021), Insight Department: Grampian Factsheet 2019 (Aberdeen City, Aberdeenshire & Moray).

8.1.4 Local Visitor Attractions

Using VisitScotland and Google Maps, local visitor attractions are set out Table 8-4 below, alongside a short description of them and their distance from the Proposed Development.

These include a variety of outdoor activities, including fishing, horse riding, and grass bowling. There are also a number of attractions relating to art and culture, particularly associated with Robert Burns, who was born in the area.

The attractions are largely clustered around Ayr (13-17km from the Proposed Development), Cumnock (10-12km), New Cumnock (12-13km), and Mauchline (11-15km).

Table 8-4: Local Tourist Attractions

Attraction	Description	Distance to Site (km)
Auchencloigh Castle	Ruined castle from the from the 15th century originally owned by the Clan Craufurd	3
Broomhill Coarse Fishery	Fishery offering Carp Fishing	4
Doon Valley Railway	Railway ran by volunteers offering train driving experiences	4
Doon Valley Swimming Pool & Leisure Centre	Offering a wide range of indoor activities including badminton, basketball, football and swimming.	5
Craigmark Burtonians FC	Local football pitch for Craigmark Burtonians	5
Dalmellington Bowling Club	Lawn bowling club open to adults and juniors	5
Ayr War Memorial	Granite war memorial dedicated to a thousand men who fell in WW1 and WW2	5
Alpacas Of Scotland Experiences - Hannahston Alpacas	Offering trekking and private alpaca experiences	6
Gemmell's Garden Centre	Garden centre with soft play facilities	7
The Lost Distillery Company Whisky Lounge	Distillery offering private whisky tasting experiences	9

Dumfries House	18th-century house set in 2,000 estate offering guided tours and outdoor activities	9
Auchinleck Castle	Ruins of medieval tower	9
Wallace's Cave Auchinleck	18th-century grotto located in the Lugar Gorge	9
Heritage Centre Cumnock	Large collection of historic memorabilia including army trucks and steam engines	10
Springwater Fishery	Fishery with fly fishing loch, silvers pond, bait fishing loch, and a coarse loch	10
Karting Nation	Kart racing track offering experiences for groups	10
Baird Institute	Leisure facility hosting museum collections, contemporary art exhibitions, and a range of events and workshops	11
Little Play Planet	Indoor play centre offering private sessions, classes, and events	11
Ayrshire Radio Control Car Club	Indoor racing facility for radio control cars	11
Glaisnock Valley Bowling Club	Local bowling club facility	11
Netherthird Community Gardens	2.4 acre garden run by local volunteers with sandpit, play area, vegetable beds, outdoor classrooms, a nature walk, and polytunnel	11
The Studio at Millbank	Jewellery workshop and teaching studio	11
Doonfest	Doonfest music festival venue	11
Blackstone Clydesdales	Offering experiences for trekking Clydesdale Horses	11
Ballochmyle Viaduct	Viaduct over the River Ayr	12
Kingencleugh Castle	Ruins of 16th-century castle	12
New Cumnock Golf Club	9-hole golf course	12
Knockshinnoch Castle Miners Memorial	Memorial for 1950 mining disaster in New Cumnock	12
Knockshinnoch Lagoons Scottish Wildlife Trust	Wildlife reserve with open water, islands and marshland, with opportunities to see migratory birds	12

Robert Burns Cairn	Cairn marking the anniversary of the New Cumnock Burns Club, overlooking the Afton Water featured in Robert Burns poetry	13
Ballochmyle Golf Club	18-hole golf course and clubhouse	13
Catrine Games Hall	Facility offering a wide range of activities, including badminton, squash, and archery	13
New Cumnock Bowling Club	Local lawn bowling club facility	13
New Cumnock Outdoor Swimming Pool	Heated open air swimming pool open between May and September	13
Burns House Museum	Home to Robert Burns whilst he lived in Mauchline and features original manuscripts and other publications	13
Catrine Nature Reserve & Voes	Nature reserve featuring woodlands and river walks, with opportunities to see a range of wildlife including birds of prey	13
Bachelors' Club	Thatched 17th-century house co-founded by Robert Burns as a Bachelors' Club	13
Dalmilling Golf Course	18-hole golf course	14
Maclaurin Art Gallery	Art gallery within Rozelle Park, hosting a variety of exhibitions	14
The Rozelle Remembrance Woodland	Woodland area featuring a tree sculpture trail	14
Rozelle House Museum and Galleries	Museum and gallery located in Rozelle Park, displaying artefacts and art and hosting exhibitions and events	14
Burns Trout Fishery	Fishery offering both bait and flyfishing across three lochs	14
Robert Burns Birthplace Museum	Museum displaying the cottage where Robert Burns was born, displaying artefacts and handwritten manuscripts	14
Ayr Rugby Football Club	Facility for local rugby and football clubs	14
Cambusdoon Sports Club	Facility offering bowling, cricket and football	14

Ayr Racecourse	Scotland's premier horse racing course, home to the Scottish Grand National and Ayr Gold Cup	15
Corsehill Park and Gardens	Park featuring a walled garden and a wide variety of flowers	15
Cambusdoon Estate & Gardens	Estate on the banks of the River Doon featuring a variety of wildlife including otters, herons, and kingfishers	15
Belleisle Golf Course	18-hole golf course and clubhouse	15
Seafield Golf Course	18-hole golf course and clubhouse	15

Source: VisitScotland (2025), Google Maps (2025).

8.1.5 Local Accommodation Providers

62 accommodation providers are located within 15km of the Proposed Development, identified through online research on the VisitScotland portal and Google Maps.

The accommodation providers are mainly concentrated in and around Mauchline, Cumnock, New Cumnock, and to the east of the Proposed Development on the outskirts of Ayr.

As shown in Table 8-5, of the 62 accommodation providers, just three were located within 5km of the site, including two holiday parks and one hotel.

Table 8-5: Local Accommodation Provider

Number of Accommodation Providers					
Distance from the Site	**Self-Catering**	**Holiday Parks / Hostels**	**B&B**	**Hotels**	**Total**
0-5km	0	2	0	1	**3**
5-10km	12	3	1	3	**19**
10-15km	20	6	2	12	**40**
Total	**32**	**11**	**3**	**16**	**62**

Source: Visit Scotland (2025) Accommodation in Ayrshire & Arran, Google Maps (2025).

8.1.6 Recreational Trails and Core Paths

Several trails were identified on Walkhighlands (2025) within 15km of the Proposed Development. These are shown in Table 8-6 alongside a brief description.

Table 8-6: Recreational Trails

Name	Description	Distance to Site (km)
Ness Glen, Near Loch Doon	3km path alongside the River Doon	8
River Ayr Way 2: Sorn to Stair	19km section of the River Ayr Way, consisting of footpaths and surfaced roads	10
Lady Hunter Blair's Walk, Straiton	A short 3km circuit through a wooded glen	10
River Ayr Way 3: Stair to Ayr	The final 20km section of the River Ayr Way	10
Monument and Bennan Hill	8km circuit over hills located in what is known as Ayrshire's 'Rambling Territory'.	11
Oswald's Trail, Auchincruive	5km walk combining a riverside path and woodland trail.	11
Three Green Knights Trail, Auchincruive	2km short walk along the south bank of River Ayr and through mixed woodland just east of Ayr.	12
Burns' Trail, Alloway	6km circular route exploring Alloway, birthplace of Robert Burns.	13
River Ayr Way 1: Glenbuck to Sorn	29km alongside the infant River Ayr through wild moorland to the village of Sorn	14

Source: https://www.walkhighlands.co.uk/

84 core paths[21] were also identified within 15km of the Proposed Development, within the local authority areas of East Ayrshire, South Ayrshire, South Lanarkshire, and Dumfries and Galloway.

8.2 Evidence on Wind Farms and Tourism

Over time, a series of works have considered the relationship between wind farm developments and tourism activity.

A study of potential effects of wind farms on tourism was undertaken in 2008 by the Moffat Centre at Glasgow Caledonian University[22]. The study was based on what could happen and found that, although there may be minor effects on tourism

[21] Scottish Government Spatial Data (2024). Core Paths - Scotland

[22] Moffat Centre (2008), The Economic Impact of Wind Farms on Scottish Tourism.

providers and a small number of visitors may not visit Scotland in the future, the overall effect on tourism expenditure and employment would be very limited.

Since this study, wind farms have become a more common feature in Scotland and any negative effects on the tourism economy as a result of their existence would now be apparent.

In 2021, BiGGAR Economics produced a report analysing the relationship between the construction of onshore wind farms and tourism employment at the national, regional and local level[23]. Nationally, the report found that, while Scotland had experienced a significant increase in onshore wind energy (with the number of turbines increasing from 1,082 in 2009 to 3,772 in 2019) whilst employment in tourism-related sectors had increased by 20%. At the local authority level, those which had seen the largest increase on onshore wind energy also experienced increases in tourism employment equal to, or greater than other areas across Scotland.

The report included case studies of 44 onshore wind farms constructed between 2009 and 2019. This included an updated analysis of 28 wind farms included in a previous report[24] constructed prior to 2015, and 16 additional wind farms constructed between 2015 and 2019. The study reported on changes in tourism-related employment in the small areas within 15km of each wind farm. Of the 28 wind farms previously analysed, the surrounding local areas of 18 experienced an increase in tourism employment above the Scottish average in the years following the construction. Of the 16 local areas surrounding the additional 16 onshore wind farms, 11 experienced increases in tourism employment which outperformed the Scottish average. These results suggested that tourism employment in local areas across Scotland changed independently of wind farms located in the area.

The report concluded that, there was no pattern or evidence suggesting that the development of onshore wind farms in Scotland had any negative effects on the tourism economies of the country as a whole, local authority areas or the immediate areas surrounding wind farms.

These conclusions are not a surprising finding given that:

- there are high levels of public support for renewable energy; [25]
- as wind farms are well-established in Scotland, tourists might already expect to see wind farms when visiting Scotland, especially rural Scotland;
- the factors that determine the success of the tourism sector do not include the presence or otherwise of an onshore wind farm; and
- issues that influence tourism include the ability and willingness to travel, economic performance (and so whether tourists have disposable income

[23] BiGGAR Economics (2021), Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms

[24] BiGGAR Economics (2017), Wind Farms and Tourism Trends in Scotland

[25] BEIS (2022). Public Attitudes Tracker: Energy Infrastructure and Energy Sources. Winter 2021, UK.

available for leisure trips), exchange rates, the quality of the overall tourism product, the effectiveness of destination marketing and the quality and value for money of the services offered by tourism businesses.

8.3 Impact on Recreation and Tourism

The research considered in the previous section points to the lack of a relationship between the tourism economy and wind farm developments. Given the importance of the tourism economy in East Ayrshire, it seems appropriate to consider whether the Proposed Development will have any impact on it. The focus in this report is on a high-level account of the key motivations leading visitors to spend time at the attractions identified earlier.

Consideration of the tourism economy in this context is based on spending of visitors and the employment supported by the sector. For a change in spending to take place it is necessary that, as a result of a wind farm development, visitors change their behaviour. This may result, for instance, in deciding not to visit the area, not recommending the area or not visiting again. The changed behaviour has, in turn, to affect visitors' spending.

As recorded in visitors' surveys, visitors tend to spend time in an area for a range of reasons. These may include scenery and landscape; history and culture; and the place's reputation. Views are just one of these factors and are more likely to be an important reason when it comes to the choice of recreational walks and outdoor nature-based attractions. Even in those cases, however, they may be one among a host of factors influencing visitors' choice.

The extent to which a given attraction is susceptible to change in its surroundings varies based on:

- its relative importance for the local tourism economy;
- its users; and
- the reasons behind the attraction's appeal (its views, its heritage value, its historical value, its value in relation to local folklore, etc.).

The extent to which a wind farm development may impact on a tourism asset is expected to depend on factors, including:

- distance from the wind farm, as a proxy for how visible the wind farm is; and
- the interaction between the wind farm and the assets' features.

Overall, existing evidence suggests that at wind farm sites across Scotland there have not been any negative impacts on tourism activity. Wind farms are well established within Scotland and there are no significant impacts on the tourism economy apparent. This is not a surprising finding given the evidence in Section 8.2.

8.4 Impact on Local Tourism and Recreation Assets

8.4.1 Local Visitor Attractions

The tourism and recreation baseline identified 50 visitor attractions, of which 5 were within a 5km radius of the Proposed Development.

The closest attraction, **Auchencloigh Castle**, is located 3km to the north of the Proposed Development. The motivation to visit this 15th century ruined castle is likely to be associated with an interest in history and is therefore not expected to be affected by the presence of the Proposed Development.

Other attractions identified within 15km of the Proposed Development, and likely to appeal to visitors with an interest in history, include:

- Ayr War Memorial
- Auchinleck Castle
- Wallace's Cave Auchinleck
- Kingencleugh Castle
- Knockshinnoch Castle Miners Memorial

Given that the motivation to visit these attractions is likely to be associated with the historical significance of the attractions themselves, the Proposed Development is not expected to affect the motivation to visit them.

Another key driver of tourism in the local area is its link with Robert Burns, the Scottish poet. Several attractions paying tribute to Robert Burns' life and work were identified within 15km of the Proposed Development, including:

- Robert Burns Carin
- Burns House Museum
- Bachelors' Club
- Robert Burns Birthplace Museum

Attractions of this nature are likely to be visited by those within an interest in art and culture, and Scottish history

The **Heritage Centre Cumnock**, **Baird Institute**, **The Studio at Millbank**, **Rozelle House Museum and Galleries**, and **Maclaurin Art Gallery**, are also likely to be visited by those with an interest in art and culture, with many of these attractions displaying artefacts and art, as well as hosting exhibitions. The motivation to visit these attractions is associated with the art in which they display and are therefore not expected to be affected by the Proposed Development.

Several attractions offering the opportunity to watch and play sports, in both indoor and outdoor facilities, were also identified within 15km of the Proposed Development, including three fisheries, three bowling clubs, three golf courses, and a

variety of sports clubs and leisure centres. These attractions were identified as follows:

- Broomhill Coarse Fishery
- Burns Trout Fishery
- Springwater Fishery
- Dalmellington Bowling Club
- Glaisnock Valley Bowling Club
- New Cumnock Bowling Club
- New Cumnock Golf Club
- Ballochmyle Golf Club
- Dalmilling Golf Course
- Ayr Rugby Football Club
- Craigmark Burtonians FC
- Catrines Games Hall
- Cambusdoon Sports Club
- Doon Valley Swimming Pool & Leisure Centre
- New Cumnock Outdoor Swimming Pool
- Little Play Planet
- Karting Nation
- Ayr Racecourse
- Belleisle Golf Course
- Seafield Golf Course

Attractions of this nature are likely to be visited by those with an interest in the specific activity in which the attraction offers, for example in golf or fishing. Therefore, the Proposed Development is not expected to affect the motivation to visit these attractions.

Alpacas of Scotland Experiences, Blackstone Clydesdale, Knockshinnoch Lagoons Scottish Wildlife Trust, and Catrine Nature Reserve & Voes, are attractions for which the motivation to visit is likely to be associated with an interest in nature and animals, offering trekking and sighting experiences. The Proposed Development will not affect these features, and therefore, the impact has been assessed as negligible on these attractions.

Several other attractions identified in the area provide visitors with the opportunity to spend time in blue or green spaces, providing access to trails and a range of wildlife and plants. Attractions of this nature include:

- Dumfries House
- Netherthird Community Gardens
- The Rozelle Remembrance Woodland
- Cambusdoon Estate & Gardens
- Corsehill Park and Gardens
- Gemmell's Garden Centre

The motivation to visit these attractions is likely to be associated with visitors wanting to explore the local landscape, spend time outdoors, and to see local wildlife. These features are not expected to be affected by the Proposed Development.

Attractions such as **Doon Valley Railway**, **Ayrshire Radio Control Car Club**, and **Ballochmyle Viaduct** are likely to appeal to those with an interest in transport, mechanics, or architecture. Given that Proposed Development will not affect the motivation to visit these attractions.

Tourists with an interest in whisky are likely to visit **The Lost Distillery Company Whisky Lounge**, which offers tasting experiences. The Proposed Development will not affect this feature, and therefore the Proposed Development is not expected to impact the motivation to visit this attraction.

The final attraction identified within 15km of the Proposed Development was **Doonfest**, an annual music festival. Given that visitors to this attraction are on an annual basis and are motivated by an interest in attending the festival, the Proposed Development is not expected to affect this attraction.

8.4.2 Local Accommodation Providers

As highlighted in the tourism baseline, the local accommodation providers in the vicinity of the Proposed Development are predominantly clustered in and around Mauchline, Cumnock, New Cumnock, and the outskirts of Ayr. With this in mind, many tourists are likely to choose to stay at these providers due to their proximity to key attractions in the region.

Over half of the accommodation providers identified within 15km of the Proposed Development were self-catering providers, of which none were within 5km of the Proposed Development, 12 were located between 5km and 10km, and 20 were between 10km and 15km of the Proposed Development.

Many of the self-catering accommodation providers highlight their luxury amenities, including hot tubs, whilst others primarily market themselves around their location within the countryside of Ayrshire and links to Robert Burns, as well as their access to attractions, including castles, golf courses, and walking routes.

16 hotels were also identified within 15km of the Proposed Development, with many of which highlighting their setting within the 'Ayrshire Countryside' and at the heart of 'Burns Country'. A further three B&Bs were identified to the north of the Proposed Development, all of which are marketed as an ideal base for tourists to explore Ayrshire and highlight their proximity and access to local attractions such as golf courses and fisheries. Similarly, the Proposed Development is not expected to affect the features of these providers.

Of the remaining accommodation providers, there were a range of holiday parks, campsites and glamping pods located within 15km of the Proposed Development.

Many of these providers predominately highlighted themselves as somewhere to 'relax' and 'unwind', with many describing their surroundings as 'peaceful' and within the 'Ayrshire countryside'.

8.4.3 Recreational Trails and Core Paths

In assessing the potential impact of the Proposed Development on the drivers of tourism, the key features of recreational trails and core paths identified have been considered below.

There are a number of trails identified within 15km of the Proposed Development which follow River Ayr Way and the River Doon, including **Ness Glen**, **Oswald's Trail** and the **Three Green Knights Trail.** The appeal of these trails is their proximity to the river and the blue space it provides for walkers.

Several of the trails identified within 15km of the Proposed Development were sections of the longer trail, the River Ayr Way, including **River Ayr Way 1: Glenbuck to Sorn**, **River Ayr Way 2: Sorn to Stair**, and **River Ayr Way 3: Stair to Ayr**. It is not expected that the presence of the Proposed Development during these brief sections of the route will affect the motivation of walkers to complete the longer trail.

The remaining three circuits identified include **Lady Hunter Blair's Walk**, a 3km circuit through a wooded glen, **Monument and Bennan Hill**, an 8km trail over hills and **Burns' Trail** which explores Alloway, the birthplace of Robert Burns**.** Since the Proposed Development will not affect the features of these trails, the Proposed development is not expected to impact the motivation to use these trails.

There are also several core paths in the area. These core paths 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.

8.5 Summary of Local Tourism Impact

A key driver of tourism in the area is Ayrshire's link to Robert Burns, with many attractions being associated with the poet himself or wider Scottish art and culture. A range of other attractions including several indoor and outdoor activity facilities, including golf courses, fisheries, and castles, also featured heavily within the local attractions identified within 15km of the Proposed Development. The Proposed Development is not expected to affect the features associated with the attractions identified.

The accommodation providers within the area most commonly highlight their location within the heart of Ayrshire and proximity and access to local attractions and activities, making the providers a good base for tourists, whilst others market their luxury amenities such as hot tubs. The Proposed Development is not expected to affect these features.

Many of the recreational trails within the vicinity of the Proposed Development are river walks, sections of longer walks, coastal paths, or feature woodland areas. Since the Proposed Development will not affect these features, the Proposed Development is not expected to impact the motivation to use these recreational trails. Given that the core paths identified are likely to be used by residents, or as part of the recreational trails, the Proposed Development is unlikely to have an impact on activity along them.

9. Conclusion: Net Economic Benefits

The Proposed Development delivers a comprehensive package of economic and wider benefits and so maximises net economic benefits for the local community.

NPF4 establishes as a requirement for renewable energy proposals that they "maximise net economic impact, including local and community socio-economic benefits such as employment, associated business, and supply chain opportunities"[26].

As set out throughout this report, Brockwell Energy Limited has a strong track record in delivering economic and wider benefits to the communities hosting its developments. The benefits of the Proposed Development and the commitments of Brockwell Energy Limited include:

- economic benefits during the development and construction phase of:
  - £11.5 million GVA and 160 years of employment in East Ayrshire; and
  - £38.2 million GVA and 560 years of employment across Scotland.
- annual economic benefits during the operations and maintenance of:
  - £1.0 million GVA and 8 jobs in East Ayrshire; and
  - £2.3 million GVA and 25 jobs across Scotland.
- contribution to public finance through the payment of non-domestic rates, which could amount to £1.2 million each year, or £48.0 million over a 40-year operational lifetime; and
- commitments to maximise local economic benefits, including a community benefit fund generating £0.5 million every year for the local economy, equivalent to £20.0 million (not including indexation) over the lifetime of the wind farm.

As well as generating economic impacts regionally and nationally, Brockwell Energy Limited's commitment to ensuring the local community benefits from the Proposed Development could support wider economic and social impacts. By committing to prioritising local contractors and supporting local skills, as well as Brockwell Energy Limited's innovative approach to community benefits, the Proposed Development will support local economic development and enable the community to support

[26] Scottish Government (2023), National Planning Framework 4 (Policy 11c)

projects and address the priorities of the area. On this basis, it can be concluded that the Proposed Development meets the requirements of the NPF4 Policy 11(c) and the relative criteria, and therefore maximises net economic impact

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