

# Balnespick Wind Farm Community and Economic Impact Report

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A report to Fred. Olsen Renewables  
December 2024





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# 1.

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## Executive Summary

Balnespick Wind Farm (the Proposed Development) is likely to deliver a series of economic benefits during the phases of construction and development and following operations, with an expected lifetime economic impact of £40.7 million GVA in Highland and £89.4 million GVA in Scotland.

Should the construction of the Proposed Development include a private wire connection to a local distillery, this would increase the economic impact of the construction phase by:

- £3.3 million GVA and 40 years of employment in Highland; and
- £5.3 million GVA and 63 years of employment in Scotland.

The Proposed Development will also contribute to public finances through the payment of non-domestic rates, which is likely to amount to £0.8 million each year. This will support the funding of local public services in the context of challenging public sector finances.

Fred. Olsen Renewables has committed to maximise local economic benefits and foster a collaborative relationship with the local community and other developers to ensure that the wind farm can deliver lasting economic and community impacts. By working with contractors to encourage use of local business, the Applicant would maximise the economic content that is sourced locally, helping to strengthen the local renewable sector. This would be expected to result in more high skilled and high paying jobs in the area. In addition, Fred. Olsen Renewables is offering a community benefit fund of £5,000 per installed MW capacity (index linked), with the goal of supporting local ambitions and needs. The local community could also take the option of this fund going towards an energy discount scheme, helping local people with their energy bills and addressing fuel poverty. The community benefit could also be used to deliver a local energy efficiency programme, supporting homeowners to invest in improvements such as insulation.

The Fourth National Planning Framework (NPF4) sets out the principles to be applied to planning decisions, regional priorities and national developments. As part of 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”. Based on the range of local economic and social benefits and the commitments made by Fred. Olsen Renewables, it can be concluded that Balnespick Wind Farm maximises net economic impact.



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## 2.

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# Introduction

BiGGAR Economics was commissioned by Fred. Olsen Renewables to assess the potential economic impact associated with the Proposed Development.

## 2.1 Background

The Proposed Development is a proposed onshore wind farm development located in Highland. It is expected that the Proposed Development would be comprised up to 9 turbines with accompanying energy storage, with a total installed capacity of up to 64.8 MW. The development will also include a battery storage facility capable of up to 10MW of battery energy storage.

The objectives of this study include:

- quantifying the potential economic impacts of the Proposed Development;
- assessing the potential for any effects on the local economy such as changes to tourism activity as a result of the Proposed Development; and
- outlining the potential for the local community the benefit from the development.

## 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 considers the economic impact from the Proposed Development;
- section 6 considers potential community benefits;
- section 7 contains a conclusion on net economic benefit;
- Appendix 1 outlines the method of estimates economic impacts;
- Appendix 2 sets tourism in the area in context and considers the relationship between the proposed wind farm and the local tourism economy; and
- Appendix 3 is the Memorandum of Understanding between Fred Olsen Renewables and Tomatin Distillery.



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## 3.

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# Strategic Context

This section sets out the national and regional context and how the Proposed Development would support strategic aims.

## 3.1 National Strategic Context

### 3.1.1 National Performance Framework

The National Performance Framework (NPF) 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 NPF 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 NPF 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 NPF 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 NPF 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 GDP and employment measures, the NPF’s outcomes reflect the desired fabric of communities and culture, education, the environment, health and well-being and measures to help tackle poverty. It is these indicators on which the Scottish Government focuses its activities and spending to help meet the national outcomes.

The 11 national outcomes are that people:

- children and young people: grow up loved, safe and respected so that they realise their full potential;
- communities: live in communities that are inclusive, empowered, resilient and safe;



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- 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.

### **3.1.2 Scotland's National Strategy for Economic Transformation**

In March 2022, the Scottish Government released the National Strategy for Economic Transformation (Scottish Government, 2022), which set out its ambition for Scotland's economy over the next 10 years. 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.

A key longer-term challenge identified in the strategy is to address deep-seated regional inequality, which includes rural and island areas that face problems such as a falling labour supply, poorer access to infrastructure and housing. The transition to net zero presents a further challenge of delivering positive employment, revenue and community benefits.

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;
- ensuring that people have the skills they need to meet the demands of the economy, and that employers invest in their skilled employees; and
- reorienting the economy towards wellbeing and fair work.

The strategy notes that Scotland has substantial energy potential, with a quarter of Europe's wind potential, and that it has developed a growing green industrial base. This provides a strong foundation for securing new market opportunities arising



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from the transition to net zero, where Scotland may be able to secure first-mover advantage and will need continuing investment and support.

### **3.1.3 Onshore Wind Sector Deal**

The Onshore Wind Sector Deal, 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.

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 to 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 the Highland and Scotland.

### **3.1.4 National Planning Framework 4**

The NPF4 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





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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, and operation and maintenance phases.

NPF4 does not set out requirements which suggest benefits have been maximised, but by considering where existing developments have had the most positive impact, some key aspects of an onshore wind farm development can suggest that the developer has maximised benefits, including:

- **Direct Economic Benefits:** as the main driver of local economic impact from renewables projects is the construction and operation of the projects themselves, one of the main ways developers can maximise impact is by ensuring as much activity as possible is retained locally, delivering jobs in the local economy and supporting economic growth;
- **Enabling Contributions:** industry good practice suggests that onshore wind developments deliver a community benefit of £5,000 per MW per annum, but community benefits are not an impact of themselves. The impact they can generate is best maximised when the developer considers how community benefit funding is allocated;
- **Bespoke Benefits for Communities:** as with community benefit funds, the impacts of an onshore wind development are best maximised when the developer considers how they can best address the needs and goals of the community, such as investing in tourism infrastructure or enabling community ownership;
- **Building Capital Stocks:** as the onshore wind sector develops in Scotland, over time cumulative impacts of onshore wind developments can be maximised if they help with skills development and building the capacity of the local supply chain. This can include events such as supplier engagement and local schools’ programmes, as well as the formation of physical capital such as transport infrastructure and affordable housing.

In addition to emphasising the need to maximise benefits, NPF4 also sets out a number of impacts that should be addressed during project design and mitigation under Policy 11(e). That list includes recreation, but does not include tourism. Whilst not required by NPF4, Section 6 of this report does consider whether there could be any implications for tourism.

### 3.1.5 Community Wealth Building

The Scottish Government has adopted the internationally recognised Community Wealth Building approach to economic development as a key practical means by which it can achieve the wellbeing economy objectives outlined in the National Strategy for Economic Transformation.

Community Wealth Building is an approach to local economic development that aims to keep wealth circulating locally to ensure more inclusive, resilient, and sustainable





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local economic development. It is a people-centred approach and aims to keep benefits in the hands of local people. Community Wealth Building is based around the following five principles:

- 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.

### **3.1.6 Local Energy Policy Statement**

The Scottish Government's Local Energy Policy Statement highlights the role of localised energy solutions as part of a green recovery to the Covid-19 pandemic and towards a net-zero and decarbonised economy. The statement is interlinked with other strategic documents in a concerted effort to increase energy efficiency; reduce emissions and eradicate fuel poverty.

The statement identifies the wide range of stakeholders involved in local energy and sets out the following key principles:

- people: engaging with stakeholders from the outset and supporting the different ways each of these will want to be involved;
- places: local energy projects should reflect the features of the local area and work in collaboration with others;
- network and infrastructure: consider the existing energy infrastructure in the area and secure high level and quality of supply to all;
- pathway to commercialisation: create projects that are commercially viable, can be replicated in the future and support net zero emissions; and
- opportunity: projects should create high value jobs and support the wider industry and its workforce.

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

Following on from the Tourism Scotland 2020 (TS2020) strategy, a collaborative network of industry experts created Scotland's Outlook 2030, 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 of climate change, technological advancements, Brexit and changing consumer behaviour on tourism and highlights the need for collaboration between government, communities and the public and private sectors.



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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 Highlands and Islands Enterprise 2023-2028 Strategy

The Highlands and Islands Enterprise Strategy, published by Highlands and Islands Enterprise (HIE) for the period 2023 to 2028, focuses on achieving Net Zero, fair and inclusive growth, and regional transformational opportunities.

The renewable energy sector and low carbon economy have been identified as significant economic, social and industrial opportunities for the region, both now and in the future. Highlands and Islands Enterprise is committed to building on the region's international reputation for excellence in energy and low carbon by securing supply chain opportunities from energy developments, including onshore and offshore wind farms, HIE commits to:

- renewable energy development: support renewable deployment (including onshore wind) and associated supply chain development;
- raise awareness and encourage adoption of the just transition to Net Zero: develop and deliver Net Zero and circular economy awareness and training programmes including those targeted at the young workforce;
- support community wealth building/benefit from Net Zero: develop awareness of nature-based and circular opportunities for communities.

### 3.2.2 Our Future Highland 2022-2027

Our Future Highland, published by the Highland Council for the period of 2022 to 2027, outlines the strategic priorities for the region over the next five years. These priorities are centred around:

- a fair and caring Highland;
- resilient and sustainable communities;
- accessible and sustainable Highland homes;
- a sustainable Highland environment and global centre for renewable energy; and
- a resilient and sustainable council.



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The strategy recognises the scale of the financial and environmental opportunities arising from the huge renewable energy potential in the Highlands, highlighting the need to capitalise on the region's natural capital whilst promoting a just transition to Net Zero in way that's fair to everyone.

### 3.3 Summary of Strategic Context

The Proposed Development is aligned with policies at a national level. The Proposed Development would directly contribute to the themes within the National Performance Framework surrounding the economy, business, and the environment, as well as the wider goal of the Scottish Government to transition to a net zero economy by 2045 while establishing Scotland as a leader in renewable energy.

The Proposed Development will contribute to the established aims of the regional area by increasing the supply of green energy, stimulating the local economic and working collaboratively with the industry and local communities to address strategic issues in the sector.

The following sections of this report consider whether the Proposed Development delivers net economic impact, in the context of Policy 11C of NPF4.



## 4.

# Local Economic Context

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

### 4.1 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:

- The Local Area, comprised of the electoral wards of Nairn and Cawdor, Badenoch and Strathspey and Inverness South;
- Highland; and
- Scotland.

### 4.2 Demographics

#### 4.2.1 Population Estimates

In 2022, the Local Area had a total population of 44,033, of which 62.0% was of working age (16-64 years old). As with the share accounted for by this demographic across Highland (60.8%), this was below average compared to Scotland as a whole. The share of the population accounted for by people of retirement age (65+) was above average in both the Local Area (21.3%) and Highland (23.2%) compared to Scotland as a whole (19.6%).

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

	Local Area	Highland	Scotland
<b>Total</b>	<b>44,033</b>	<b>238,100</b>	<b>5,479,900</b>
0-15	16.7%	16.0%	16.6%
16-64	62.0%	60.8%	63.8%
65+	21.3%	23.2%	19.6%

Source: National Records of Scotland (2022), Mid-2022 population estimates Scotland.



### 4.2.2 Population Projections

Over the period between 2022 and 2043, the total population of Highland is projected to fall by 2.0%, from 238,100 to 233,250. During the same period, the population of Scotland is projected to increase by 1.7%.

The share of the working-age population in Highland is projected to fall from 60.8% to 56.0%. This is equivalent to a reduction of 14,152 people of working age in the region. During the same period, it is expected that the share of the population aged 65+ is projected to rise from 23.2% to 29.8%. 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 63.8% to 60.3% and the share of the population aged 65 and over is projected to increase from 19.6% to 24.9%.

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 Highland to attract and retain people of working age. The economic opportunities created by the Proposed Development will contribute towards this.

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

	Highland		Scotland	
	2022	2043	2022	2043
<b>Total</b>	<b>238,100</b>	<b>233,250</b>	<b>5,479,900</b>	<b>5,574,819</b>
0-15	16.0%	14.3%	16.6%	14.8%
16-64	60.8%	56.0%	63.8%	60.3%
65+	23.2%	29.8%	19.6%	24.9%

Source: National Records of Scotland (2022), Population Projections 2012-2043.

## 4.3 Industrial Structure

In 2022, the sector employing the most people in the Local Area was the accommodation and food service activities sector, generally associated with tourism. This sector employment 16.9% of workers in the Local Area and 12.2% of workers in Highland, both above average when compared to Scotland as a whole (8.2%), suggesting a reliance on tourism for employment, particularly in the Local Area.

The construction sector is also a significant employer in both the Local Area and Highland, employing 8.3% and 6.7% of workers, respectively. This was above average compared to the level of employment represented by this sector across Scotland as a whole (5.6%). This suggests that businesses in the Local Area and Highland are in a position to benefit from contracts associated with the construction of the Proposed Development.



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

	Local Area	Highland	Scotland
Accommodation and food service activities	16.9%	12.2%	8.2%
Wholesale and retail trade; repair of motor vehicles and motorcycles	15.7%	13.4%	12.8%
Human health and social work activities	12.4%	15.3%	15.1%
Arts, entertainment and recreation	8.6%	3.3%	2.9%
Construction	8.3%	6.7%	5.6%
Professional, scientific and technical activities	6.4%	4.7%	7.4%
Education	5.6%	7.1%	8.4%
Administrative and support service activities	5.4%	5.1%	7.8%
Public administration and defence; compulsory social security	3.8%	4.7%	6.2%
Information and communication	3.6%	2.0%	3.1%
Manufacturing	3.4%	4.7%	6.6%
Transportation and storage	3.0%	3.7%	4.0%
Other service activities	2.0%	1.2%	1.7%
Real estate activities	1.7%	1.2%	1.4%
Agriculture, forestry and fishing	1.6%	11.0%	3.4%
Financial and insurance activities	1.0%	0.7%	3.1%
Mining and quarrying	0.3%	0.3%	1.0%
Water supply; sewerage, waste management and remediation activities	0.1%	1.8%	0.7%
Electricity, gas, steam and air conditioning supply	0.0%	0.8%	0.7%
<b>Total Employment</b>	<b>15,255</b>	<b>126,400</b>	<b>2,621,000</b>

Source: Office for National Statistics (2023), Business Register and Employment Survey (BRES) 2022

## 4.4 Economic Activity

In 2023 the unemployment rate in Highland (2.7%) was lower than that of Scotland (3.4%). At the same time, the rate of economic activity was slightly higher in



Highland (78.8%) than across Scotland as a whole (77.9%), suggesting a relatively tight labour market in the region.

From October 2022 to September 2023, the median annual gross income for Highland (£29,049) was lower than that of Scotland as a whole (£29,842), demonstrating that the local authority has a lower wage economy than Scotland as a whole.

**Table 4-4 Economic Activity, 2022/23**

	Highland	Scotland
Economic Activity	78.8%	77.9%
Unemployment Rate	2.7%	3.4%
Median Annual Gross Earnings (resident)	£29,049	£29,842

Source: ONS (2023), Annual Population Survey Apr-2023-Mar 2023 and Annual Survey of Hours and Earnings – resident analysis 2023

## 4.5 Education

In 2021, the share of people with a NVQ4+ Qualification, which is equivalent to a Higher Education Certificate, in Highland (45%) was less than the Scottish average (50.0%). This suggests that there is a lack of opportunities in the region for people with higher education qualifications.

**Table 4-5 Qualification Levels, 2021**

	Highland	Scotland
NVQ4+	45%	50%
NVQ3+	62%	65%
NVQ2+	84%	80%
NVQ1+	91%	86%
Other Qualifications	3%	6%
No Qualifications	5%	8%

Source: ONS (2021), Annual Population Survey Jan 2021 – Dec 2021.

### 4.5.1 Fuel Poverty

Scottish legislation defines a household as being in fuel poverty when more than 10% (or 20% for extreme fuel poverty) of income is required to pay for heating. Whilst the latest available data has been used, it is likely, given the rise in energy prices beginning in 2022, that there has been a further increase in the number of households that are in fuel poverty.





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In Highland in 2022, 33% of households were living in fuel poverty, significantly higher than the Scottish average of 24%. This represents 36,000 households whose heating bills require more than 10% of their income. Of these households, over two thirds (67%) are living in extreme fuel poverty. The rate of extreme fuel poverty in Highland in 2022 was 22%, also significantly higher than the Scottish average of 12%.

Residents aged 65 and older are particularly vulnerable to fuel poverty, as they are more likely to be living on a fixed income, spending long periods of time at home, and living in substandard housing. Given that the population demographics of the Local Area show that this age group is overrepresented and is projected to increase over the next two decades, fuel poverty will be an ongoing issue for the communities surrounding the Proposed Development.

## 4.6 Summary of Socio-Economic Context

The Local Area and Highland feature an older age profile, with a relatively higher share of their populations being 65+ compared to Scotland. This trend is likely to reinforce in the future, as over 29% of Highland's population is expected to be 65+ by 2043 while the working age population is projected to fall by 14,152 between 2022 and 2043. Based on these trends, a smaller population of working age will have to support an increasingly old population. Therefore, it is important for the Local Area to attract people of working age. The Proposed Development will generate needed employment opportunities to address this issue.

The rate of economic activity in Highland is higher than that of Scotland, while the unemployment rate is lower, suggesting a tight labour market. The median annual gross wage is also slightly lower than the Scottish average. The Proposed Development has the potential to generate long-term, well-paid jobs in the Local Area, retaining a skilled workforce and attracting people through job creation.

The level of both fuel poverty and extreme fuel poverty is higher than average in Highland. This is an issue that the Proposed Development can help to address directly through its community benefits package.

The expansion of the onshore wind sector in the area could provide an opportunity for a further diversification of its economic base. In addition, the sector could contribute to the retention of young people in the area through high skilled and high paying jobs.



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## 5.

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# Economic Impact

This section estimates the economic impact that is likely to be generated by the Proposed Development.

## 5.1 Economic Impact Methodology

### 5.1.1 Modelling the Economic Impact of Onshore Wind Farm Developments

The approach followed in estimating the economic impact from onshore wind developments is based on industry best-practice. In particular, it draws on evidence on the construction and operational costs associated with a range of onshore wind farm projects across the UK conducted in 2015 by BiGGAR Economics on behalf of RenewableUK<sup>1</sup> and other more recent case studies of actual construction and operational costs in the sector.

This method has been used over time to estimate the economic impact associated with a number of onshore wind developments. As shown in Figure 5-1, the modelling exercise consists of four stages:

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

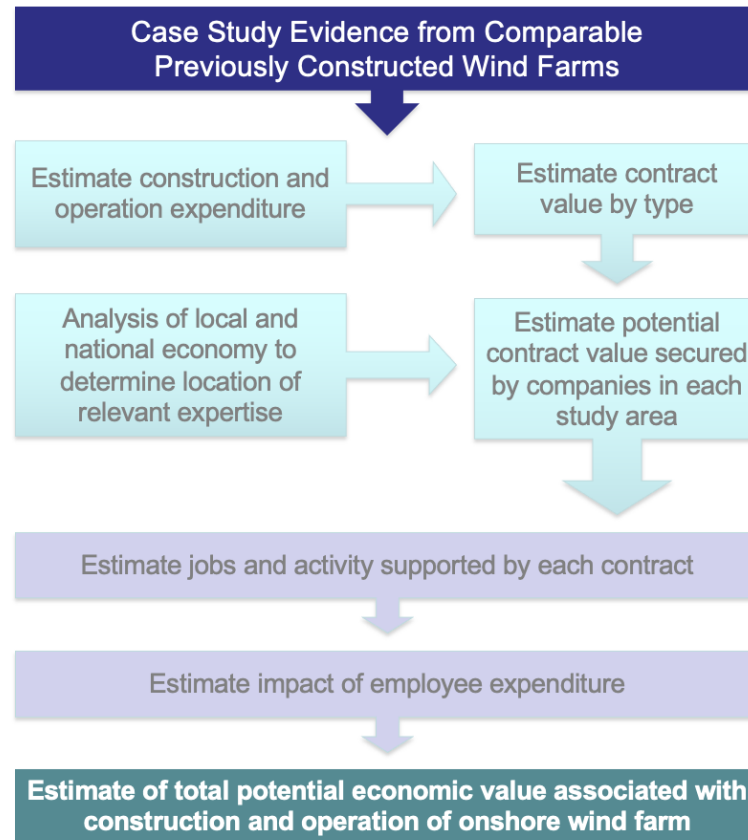
To account for the different ability of businesses across Scotland in fulfilling onshore wind contracts, assumptions are adjusted based on BiGGAR Economics' experience working with developers in Highland.

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<sup>1</sup> RenewableUK (2015), Onshore Wind: Economic Impacts in 2014.



**Figure 5-1 Approach to Economic Impact**



### 5.1.2 Measures of Economic Impact

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 Proposed Development. As an example, a job that lasts for 18 months would support 1.5 years of employment.

### 5.1.3 Sources of Economic Impact

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.



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#### 5.1.4 Study Areas

Economic impacts were estimated with respects to the following study areas:

- Highland; and
- Scotland.

Impacts presented in this report are inclusive, i.e. impacts for Scotland include those for the Highland.

## 5.2 A Commitment to Local Suppliers

The Applicant has committed to supporting the local supply chain, specifically by encouraging the main contractors to spend at least 30% of the contract value locally and incentivising all contractors to use local content. This aligns with the third principle of community wealth building, relating to progressive procurement of goods and services, as well as guidance produced in 2014 by RenewableUK on how to maximise local content.<sup>2</sup>

It is not possible to provide a robust estimate of the value of contracts that could be secured by local businesses because of the developer's commitment to using local content, however, as one of the longest standing renewable energy developers in the UK, and having developed multiple onshore wind farms in Highland, and across Scotland as a whole, Fred. Olsen Renewables is likely to have existing relationships with companies in the area, increasing the potential for economic impacts both regionally and nationally, which has been considered in the development of assumptions around contracts likely to be awarded to companies in Highland.

It is also important to note that the prevalence of small businesses within the local economy, means even relatively small contracts could have disproportionate effects. This would particularly be the case if this process were to assist local business(es) to secure a foothold in the onshore wind supply chain, which could have implications beyond the Proposed Development. Contractually secure work is also an important characteristic of "just labour markets", making this scheme consistent with the fourth principle of community wealth building, which relates to fair employment.

### 5.2.1 Development and Construction

Based on the expected nine turbines with a total generating capacity of up to 64.8 MW and a battery storage capability of 10 MW, it was estimated that the total development and construction expenditure is likely to amount to £115.3 million. Expenditure was then split according to the following component contracts:

- development and planning;
- turbine;
- balance of plant;

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<sup>2</sup> RenewableUK (2014), Local supply chain in onshore wind, good practice guide.



- grid connection; and
- the battery storage component.

The largest expenditure component was associated with turbines, equivalent to £63.6 million, or 55% of total construction and development spend. Expenditure on balance of plant contracts is likely to contribute around 22% of total expenditure. It was estimated that the battery storage element contracts would account for 11% of spending on construction, with grid connection accounting for 6% and development and planning accounting for 5%.

**Table 5-1 Development and Construction by Contract Type**

	<b>% Capex</b>	<b>Value (£m)</b>
Development and Planning	5%	6.2
Turbines	55%	63.6
Balance of Plant	22%	25.9
Grid Connection	6%	6.5
Battery Storage	11%	13.2
<b>Total</b>	<b>100%</b>	<b>115.3</b>

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

Having made assumptions based on previous work on onshore wind developments in Highland and the Applicants' commitment to maximise local content, it was estimated that Highland could secure contracts worth up to £27.7 million, equivalent to 24% of total capital expenditure. The largest opportunities would be the contracts related to balance of plant, as companies in the area could secure up to 77% of these contracts, worth a total £20.0 million. It was estimated that Scotland (including Highland) could secure contracts worth £37.8 million, equivalent to 33% of total



capital expenditure. The largest opportunity will be balance of plant contracts, worth around £22.3 million.

**Table 5-2 Development and Construction Expenditure by Study Area<sup>3</sup>**

	Highland		Scotland	
	%	£m	%	£m
Development and Planning	35%	2.2	62%	3.9
Turbines	2%	1.6	8%	4.9
Balance of Plant	77%	20.0	86%	22.3
Grid Connection	58%	3.7	71%	4.6
Battery Storage	2%	0.3	16%	2.1
<b>Total</b>	<b>24%</b>	<b>27.7</b>	<b>33%</b>	<b>37.8</b>

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 consider the Gross Value Added (GVA) and short-term employment that these are likely to support.

It was estimated that the development and construction of the Proposed Development is likely to generate £14.6 million direct GVA in Highland and £19.9 million direct GVA in Scotland.

**Table 5-3 Development and Construction, Direct GVA by Study Area (£m)**

	Highland	Scotland
Development and Planning	1.7	2.7
Turbines	0.7	2.4
Balance of Plant	10.1	11.3
Grid Connection	2.0	2.4
Battery Storage	0.1	1.0
<b>Total</b>	<b>14.6</b>	<b>19.9</b>

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

In a similar way, it was possible to estimate the number of direct jobs supported by spending in construction and development contracts. It was estimated that the development and construction of the Proposed Development is likely to generate 160 direct years of employment in Highland and 230 direct years of employment in Scotland.

<sup>3</sup> All impacts presented in this report are inclusive i.e. impacts for Scotland include those for the Highland



**Table 5-4 Development and Construction, Direct Employment by Study Area and Contract Type (Years of Employment)**

	Highland	Scotland
Development and Planning	4	17
Turbines	10	36
Balance of Plant	118	132
Grid Connection	25	31
Battery Storage	2	14
<b>Total</b>	<b>160</b>	<b>230</b>

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

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

Adding up direct, indirect and induced GVA and employment impacts, it was estimated that the development and construction of the Proposed Development is likely to generate:

- £18.6 million GVA and 197 years of employment in Highland; and
- £31.6 million GVA and 349 years of employment in Scotland.

### 5.2.2 Private Wire Connection

Fred. Olsen Renewables has a memorandum of understanding (MoU) with Tomatin Distillery that the construction of Balnespick Wind Farm will include the installation of a private wire connection to the distillery, subject to further investigation to ensure its viability (Appendix 3: MoU with Tomatin Distillery). This work would support its operations and improve the sustainability of the local tourism business.

Whilst detailed investigations are still needed to finalise the feasibility of private wire, this would increase the expenditure associated with the construction of the Proposed Development. Using information from Fred. Olsen Renewables, it was estimated that installing a private wire connection would result in an additional £8.0 million of expenditure. Using the same methodology applied to overall construction expenditure, it was estimated that the construction of a private wire connection could generate an additional:

- £3.3 million GVA and 40 years of employment in Highland; and
- £5.3 million GVA and 63 years of employment in Scotland.





## 5.3 Operations and Maintenance

The first step in estimating the economic impact from the operations and maintenance of the Proposed Development was to consider the total expenditure required for its operation each year. Based on the number of turbines and the Proposed Development’s capacity, it was estimated that the annual cost of operations and maintenance (Opex) is likely to amount to around £2.5 million.

It was further assumed that businesses in Highland are likely to benefit from a total £0.9 million in operations and maintenance contracts (36% of Opex) each year, whereas annual expenditure in Scottish contractors is likely to be up to £2.0 million (82% of Opex).

**Table 5-5 Operations and Maintenance Spending by Study Area**

	Highland		Scotland	
	%	£m	%	£m
Operations and Maintenance	36%	0.9	82%	2.0

Source: BiGGAR Economics Analysis.

By applying economic ratios, it was estimated that the Proposed Development is likely to generate £0.5 million direct GVA and 3 direct jobs in Highland, and £1.1 million direct GVA and 8 direct jobs across Scotland.

As with the development and construction of the Proposed Development, it was then necessary to estimate the indirect and induced impacts associated with operations and maintenance contracts to account for the ‘knock-on’ effects across the economy.

Adding up direct, indirect and induced impacts, it was estimated that during its annual operations and maintenance, the Proposed Development is likely to generate:

- £0.6 million GVA and 4 jobs in Highland; and
- £1.7 million GVA and 13 jobs across Scotland.

## 5.4 Non-Domestic Rates

The Proposed Development is also expected to provide a stream of revenue to Highland Council through the annual payment of non-domestic rates.

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



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Scottish Assessors Association<sup>4</sup> to information about the performance of the Proposed Development.

On this basis, it was estimated that throughout its operation the Proposed Development is likely to contribute to public finances around £0.8 million each year. Over a 35 year operational lifetime, the contribution towards non-domestic rates is likely to amount to around £27.2 million.

For the period of 2024/25, Highland Council had a budget of £712 million.<sup>5</sup> Balnespick Wind Farm would strengthen the financial position of the Council, supporting additional spending on public services, though in practice not all of the income would necessarily go to the Council since the distribution of non-domestic rate revenues are determined nationally.

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<sup>4</sup> Scottish Assessors Association (2023), Practice Note 2: Valuation of On-shore Wind Turbines

<sup>5</sup> Highland Council (2024), Budget 2024 to 2025. Available:

[https://www.highland.gov.uk/info/670/consultations\\_complaints\\_and\\_compliments/668/our\\_budget](https://www.highland.gov.uk/info/670/consultations_complaints_and_compliments/668/our_budget)



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## 6.

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# Community Impacts

This chapter considers how the Applicant aims to maximise the local economic benefits generated by the Proposed Development

## 6.1 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.

### 6.1.1 What Does Good Look Like?

Community benefit funds first began to emerge in Scotland in the early 2000s and became increasingly common over the next decade. Over this period an approach to good practice gradually emerged. This approach consists of two main elements:

- the financial value of support provided; and
- how funds are negotiated, administered, and used.

In terms of the financial value of funds, active encouragement from government ministers helped to ensure that £5,000 per MW per year emerged as common practice. This figure was eventually formalised in official guidance published in 2014, and updated in 2019 to confirm that the Scottish Government would:

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**“...continue at a national level to promote community benefits of the value equivalent to £5,000 per installed megawatt per annum, index linked for the operational lifetime of the project.”**

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The guidance also outlines six general principles the Government expects developers to apply to help guide the negotiation, administration, and use of funds.

**Figure 6-1 Scottish Government Principles of Community Benefit**



Source: Scottish Government

While this guidance is and has always been voluntary, it is widely recognised across industry and amongst community groups as the accepted standard of good practice.

Our work in the onshore wind sector has shown that the way developers work can be as important as what they do, with the most effective efforts to maximise the benefits of onshore wind developments exhibiting certain characteristics, including:

- Tailoring the offer to the needs of a community;
- Incorporating innovative ideas and learning from past experience;
- Collaborating with others to enhance delivery; and
- Being transparent in interactions with the community.

These characteristics all align with the principles set out by the Scottish Government guidance on community benefits from offshore wind.

Fred. Olsen Renewables proposes various schemes which aim to maximise economic benefits to the local area. This section sets out a series of initiatives that the Applicant is proposing to undertake to maximise its local economic impact based on the needs and interests of the local community.

## 6.2 Community Benefits

Over the past decade it has become common practice for developers of onshore wind farms in Scotland to establish community benefit schemes as part of their proposals. The Scottish Government has commended the sector's ongoing commitment to this practice and actively promoted its widespread adoption through



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the publication of good practice guidance.<sup>6</sup> In this guidance the Scottish Government encourages developers to establish schemes with a community benefit value equivalent to £5,000 per installed MW per year.

In line with Scottish Government recommendations, the Applicant has committed to offering £5,000 per installed MW per year in a community benefits package for the local area as part of the Proposed Development.

While the scheme is not material in planning terms, it has the potential to generate effects that could be significant in socio-economic terms, so it is important these potential benefits are considered within this assessment.

Fred. Olsen Renewables is considering a number of avenues to best address the needs of the area using the community benefits with consideration for the views of the people living in the area. This work aligns with the second principal of community wealth building, ensuring that financial power works for local people, in this case by providing mechanisms for harnessing the financial benefits of natural capital for the benefit of the local community.

### **6.2.1 Community Benefit Fund**

Fred. Olsen Renewables has committed to offering £5,000 per installed MW per year in a community benefits package for the local area. Based on an installed capacity of 64.8 MW, this would be expected to amount around £324,000 annually, or £11.3 million over a 35-year operational lifetime of the Proposed Development. The nature of how this fund will be used will depend on decisions taken by the community. One possible use is for the fund to be managed locally and used to support existing community projects and identified future projects. Under this option, the community benefit fund would be designed to support community-wide initiatives compatible with existing funding structures and application mechanisms. This fund could:

- Provide an annual percentage of the funding directly to community council areas that fall within a 10km radius of the site;
- Involve the opportunity to split the fund between a regional and a local element – with local communities able to apply to both elements; or
- Be designed in partnership with the community and have a local decision-making structure.

### **6.2.2 Electricity Discount Scheme**

The Applicant is also working to understand the interest within the community for this fund to go towards an energy discount scheme to reduce the energy bills of people living in the local area. This scheme would be designed in partnership with the community in order to meet their needs, but initial plans include that the scheme would be open to open to all residential properties within an approximate 10km

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<sup>6</sup> Scottish Government (2019), Scottish Government Good Practice Principles for Community Benefits from Onshore Renewable Energy Developments.



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radius of the wind farm, meaning around 900 properties could receive a discount of up to £277 per annum on their electricity bills.

The practical effect of these discounts will be to enable the households affected to spend more on other goods and services such as food, clothing, transport, and leisure. The value of the energy discounts therefore represents additional turnover for the sectors that benefit from household expenditure, the money spent by households to meet their everyday needs. Household spending patterns<sup>7</sup> show that those with higher incomes spend a greater proportion of their total expenditure on recreation and hospitality. By enabling residents to spend more on leisure, the provision of support with energy bills for the local community is therefore likely to generate economic benefits and support jobs in the local hospitality and leisure sectors.

It was assumed that 50% of the household spending enabled by the community benefit would occur in Highland and 70% would occur across Scotland. The economic impact of this expenditure was then estimated by applying turnover/GVA and employment ratios for these sectors to this additional turnover.

In this way, it was estimated that each year the electricity bills scheme associated with the Proposed Development could generate:

- £69,800 GVA and one job in Highland; and
- £120,100 GVA and one job in Scotland.



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## Carsphairn Local Energy Discount Scheme (LEDS)

Carsphairn Local Energy Discount Scheme (LEDS) has been operational since 2018. One of the first LEDS in Scotland, it is administered by Carsphairn Community Council and fully funded by Windy Standard Wind Farm.

The initiative supports local residents to pay for their energy related bills and addressed the challenge of rising energy costs, helping the fuel poor and minimising fuel poverty.

The scheme is open to all properties that are lived in full time (excluding holiday homes and second homes). Local residents are encouraged to apply into the scheme annually. Since its inception, the LEDS has provided over £127,000 in direct

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<sup>7</sup> ONS (2022), Family spending in the UK: April 2020 to March 2021



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payments. In 2022 alone, 101 houses were provided with £400 towards their energy bills.

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### **6.2.3 Energy Efficiency Support**

Fred. Olsen Renewables is also offering the option for the community benefit fund to be used for a local energy efficiency programme (LEEP) to enable local homeowners to improve the energy efficiency of their homes, filling the gap where capital investment can prevent homeowners from progressing. This fund would aim to complement existing energy efficiency schemes and financial incentives, supporting the installation of home energy efficiency measures such as:

- Insulation;
- Improved glazing;
- Heat pumps; and
- Solar technology.

This fund would focus on supporting those in need in their own homes, providing direct support for residents and helping them onto a path of zero carbon.

## **6.3 Private Wire Connection to Tomatin Distillery**

As part of the Applicant's plans to support tourism in the local area, an MoU has been reached committing to the construction of a private wire connection to Tomatin Distillery subject to further investigation to ensure its viability. As well as increasing the economic impact associated with expenditure on the construction of Balnespick wind farm, this private wire connection would support the operations of the distillery, a local tourism business which employed 73 people as of 2023,<sup>8</sup> by reducing its energy costs and improving its sustainability. By reducing the energy costs of the distillery, this would enable Tomatin to invest more in its facilities, building upon its existing offering for tourists, with the potential to attract more tourism to the area.

If this proves to be viable, the Applicant hopes that this private wire connection it could bring forward further opportunities for the local community, including:

- A direct supply of electricity to community facilities; and
- Facilitating further EV charging points locally.

On a larger scale, the supply of electricity directly to the distillery could also support government aspirations for an EV highway on the A9.

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<sup>8</sup> Wilson, K (2024), 'Tomatin Distillery boss says slower consumer spending leading to 'difficult' trading conditions', The Press and Journal, 20th July.





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This plan aligns with the community wealth building principle of socially productive use of land and property.

## 6.4 Working with the Local Community

Fred. Olsen Renewables has undertaken consultation locally in order to develop plans for the community benefit associated with Balnespick Wind Farm to be utilised to strategically address identified local needs and challenges. Key themes that emerged from these discussions were energy consumption, sustaining local facilities, and recreation and tourism.

By engaging with the local community, Fred. Olsen Renewables has ensured that the community benefit offering has the characteristics of a community benefit which will best serve the local area. The offering is tailored to the needs of the community, aiming to address a number of local concerns by offering the opportunity for the area to benefit from innovative plans for the fund and a private wire connection to a local tourism business. The Applicant has incorporated collaborating with others to enhance delivery into their suggestions for the community benefit offering, suggesting that a community benefit fund be handled locally to ensure it is used to support local strategic goals and projects. Fred. Olsen Renewables has also been transparent with the community, organising community consultations and seeking to understand the type of package that would best meet the needs of the area.

In this way, the Applicant's approach to community benefits has exhibited all of the characteristics of a community benefit which best delivers for the local area.



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## 7.

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# Conclusion: Net Economic Benefits

Balnespick Wind Farm delivers a comprehensive package of economic and wider benefits.

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”<sup>9</sup>. Together, the impacts that would be generated by Balnespick Wind Farm through its direct impacts and the commitments of the Applicant, would deliver a large cumulative impact on the local community, as well as across Highland and Scotland.

The benefits of Balnespick Wind Farm and the commitments of Fred. Olsen Renewables include:

- economic benefits during the construction and development phase of:
  - £18.6 million GVA and 197 years of employment in Highland;
  - £31.6 million GVA and 349 years of employment in Scotland;
- annual economic benefits during the operations and maintenance of:
  - £0.6 million GVA and 4 jobs in Highland;
  - £1.7 million GVA and 13 jobs across Scotland;
- a potential private wire connection to a local distillery, supporting the operations of a local tourism business which employs 73 people, and increasing the economic impact of construction and development phase by:
  - £3.3 million GVA and 40 years of employment in Highland;
  - £5.3 million GVA and 63 years of employment in Scotland;
- contribution to public finances through the payment of non-domestic rates, estimated to amount to £0.8 million each year;
- a community fund which is likely to generate £5,000 per MW per annum, equivalent to £324,000 annually, or £11.3 million over the 35-year operational lifetime of Balnespick Wind Farm, for the local area;
  - this fund could also be used to deliver an energy discount scheme, helping local people with their energy bills;

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<sup>9</sup> Scottish Government (2023). National Planning Framework 4 (Policy 11C)



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- it could also be used to deliver a local energy efficiency programme, supporting homeowners to invest in improvements such as insulation;
  - working with contractors to maximise economic content sourced locally which would result in more high skilled and high paying jobs in the area.

On this basis, it can be concluded that Balnespick Wind Farm maximises net economic impact, in line with NPF4 Policy 11(c).



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## 8.

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# Appendix 1: Economic Impact Method

## 8.1 Direct Impacts

The estimation of economic benefits from the development and construction of the Proposed Development draws on 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 based on evaluations of individual wind farm developments and on experience with developers working across Scotland. This body of evidence allows to estimate costs per MW based on a development's number of turbines, its capacity or a combination of the two.

To estimate the direct economic impacts from the construction and development and the operation of the Proposed Development, it is first necessary to make assumptions on the ability of businesses within each study area to carry out contracts.

The economic impact from the construction and development phase and the operational phase was estimated for Highland and Scotland. To achieve this, it was necessary to estimate the proportion of each contract that might be secured in each of the study areas. The assumptions were based on the average levels of content from the RenewableUK research, analysis of the industrial structure in each study area, and BiGGAR Economics' previous experience undertaking such analysis for other renewable energy projects in Highland. They also take account of the Applicant's commitment and experience in ensuring that, where possible, all main contractors and their sub-contractors will use local content.

Each contract category was split into its component contracts and assigned an industrial sector, based on its Standard Industrial Classification (SIC). Direct GVA was then estimated by applying the relevant turnover per GVA from the UK Annual Business Survey (ABS).<sup>10</sup> Direct jobs were estimated by apply the relevant the turnover per job ratio to expenditure associated with each component contract.

## 8.2 Indirect and Induced Impacts

To estimate indirect and induced impacts, relevant Type 1 and Type 2 GVA and employment multipliers from the Scottish Government Input-Output Tables<sup>11</sup> were applied to direct GVA and direct employment. Since the multipliers refer to sectoral

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<sup>10</sup> ONS (2023), Annual Business Survey 2021

<sup>11</sup> Scottish Government (2022), Scottish Input Output Tables 2019



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interactions occurring at the level of the Scottish economy, it was necessary to adjust them when considering impacts taking place in Highland.



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## 9.

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# Appendix 2: Tourism and Recreation

This section provides a baseline of tourism activity in the area and assesses the potential impact of the Proposed Development on tourism and recreation.

## 9.1 NPF4 on Tourism

Policy 11(e) of NPF4 sets out a number of impacts that should be addressed during project design and mitigation under Policy 11(e). That list includes recreation, but does not include tourism. Whilst not required by NPF4, this report does consider whether there could be any implications for tourism as this is an important sector within the Local Area and across Highland as a whole and any assessment of the net economic benefits of the Proposed Development should consider potential negative impacts.

## 9.2 Tourism Baseline

### 9.2.1 GVA and Employment

In its 2015 economic strategy<sup>12</sup> 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.

The most recent data on GVA for sustainable tourism shows that Highland generated £278.0 million GVA in 2021, equivalent to 8.3% of the total £3,365.8 million GVA generated by the sector across Scotland that year.

In 2022, 18,000 people in Highland were employed in the sustainable tourism sector, not yet reaching pre-pandemic levels, whereas in Scotland, employment in the sustainable tourism sector in 2022 was equal to employment in 2019. Sustainable

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<sup>12</sup> Scottish Government (2015), Scotland's Economic Strategy.



tourism employment in Highland accounted for 7.9% of employment in the sector across Scotland.

**Table 9-1 Sustainable Tourism: Employment and GVA**

	Highland				Scotland			
	2019	2020	2021	2022	2019	2020	2021	2022
GVA (£m)	291	130	278	-	4,504	2,564	3,366	-
Employment (000s)	19	14	15	18	229	189	209	229

Source: Scottish Government (2023), Growth Sector Statistics

### 9.2.2 Visitors to Highland

In 2023, the Highlands<sup>13</sup> received 1.8 million domestic overnight visitors, who spent an average £248 per visit, amounting to £437 million. This accounted for 14% of the total spend in Scotland from domestic overnight visits in 2023.

The region also drew approximately 527,000 international visitors, contributing £325 million of expenditure to the region, equivalent to a spend per trip of £617. The Highlands accounted for 13% of international overnight visitors to Scotland and 9% of expenditure by this group.

**Table 9-2 Visits and Visitor Spending, 2023**

	Highlands	Scotland
<b>Visitor Numbers (million)</b>		
Domestic Overnight Visitors	1.8	12.4
International Overnight Visitors	0.5	4.0
<b>Spend (£ million)</b>		
Domestic Overnight Visitors	437	3,189
International Overnight Visitors	325	3,593

Source: Kantar (2020), Great Britain Tourist Survey, ONS (2020), International Passenger Survey.

### 9.2.3 Regional Attractions

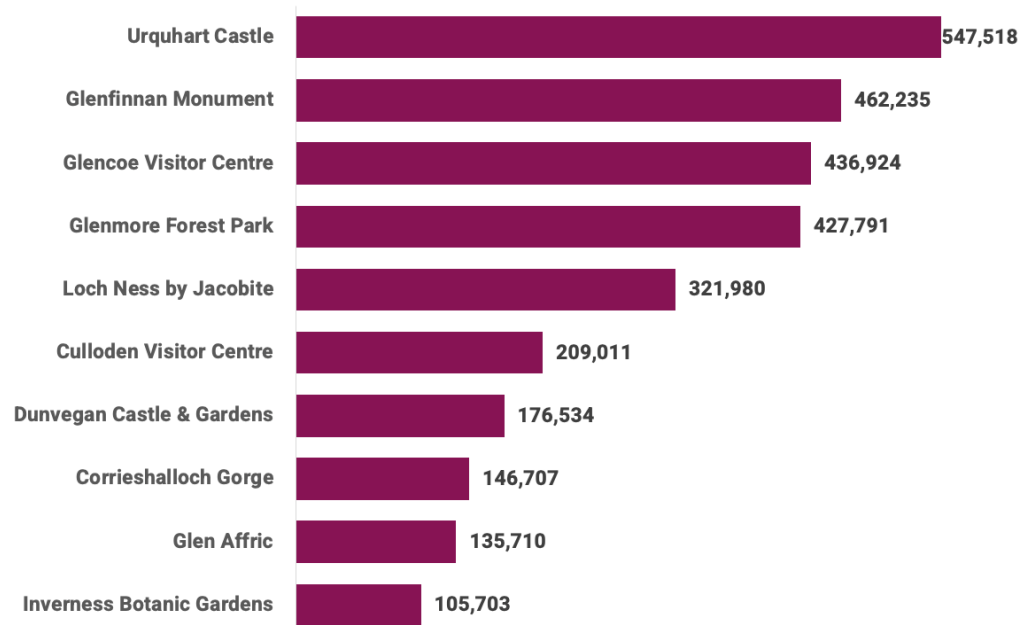
Visit Scotland compiles the top ten most visited attractions by Scottish region. Of the top ten most visited tourist attractions in Highland are shown below in Figure 9-1. Of the most visited attractions in the region, none are within 15km of the Proposed Development. The closest, Culloden Visitor Centre, which received 209,011 visitors in 2019, is located 19km from the Proposed Development.

<sup>13</sup> Highlands region as defined by VisitScotland, including the local authorities of Highland, Eileanan Siar, Orkney Islands, and Shetland Islands





**Figure 9-1 Regional Tourist Attractions**



Source: Visit Scotland (2021), Insight Department: Highlands and Islands Factsheet 2019

**9.2.4 Local Visitor Attractions**

A series of local visitor attractions within a 15km radius are set out in Table 9-3 below, alongside a description of them and their distance from the Proposed Development. These were identified through the VisitScotland portal, Trip Advisor and Google Maps, and include both indoor and outdoor tourist attractions in the local area.

**Table 9-3 Local Visitor Attractions**

	Description	Distance to Turbine (km)
Carrbridge Golf Club	Nine-hole golf course with burns and ditches	6
The Tomatin Distillery	A whisky distillery offering guided tours	7
Landmark Forest Adventure Park	Adventure Park with three water coasters, a high-ropes course and a butterfly hot-house	7
Carrbridge Studio	Located in Carrbridge, this studio and gallery displays original paintings, prints, and ceramic sculptures	7
Moy Country Fair	An annual country fair featuring a range of activities and displays	10



Carrbridge Carriage Driving	Centre where visitors can learn to drive a horse and carriage	10
Milton Loch Community Wood	Wood where visitors can undertake activities such as walking and cycling while viewing local wildlife including red squirrels	11
Boat of Garten Golf & Tennis Club	Golf course founded in the early 20th Century	12
Lochindorb Castle	Ruins of a 13 <sup>th</sup> century castle	12
Speyside Centre	Visitor centre featuring a café and gift shop	12
Dulsie Bridge	Bridge offering scenic views over the River Findhorn	13
Castle Roy	Ruins of a 12 <sup>th</sup> century fortress	15
RSPB Scotland Loch Garten Nature Centre	Centre offering guided forest walks through Abernethy Forest	15
Abernethy Golf Club	Golf club founded in 1893 which borders Abernethy Forest	15
Nethy Bridge Visitor Centre	Visitor Centre providing visitor information, as well as exhibits and displays on the natural history of Abernethy and the Cairngorms National Park	15
Escape Cairngorms	Centre with a number of escape rooms	15
Cairngorms Activities	Activity centre where visitors can take part in guided outdoor activities in the Cairngorms including climbing and canoeing	15
Craggan Football	Outdoor centre where visitors can play golf, discgolf and footgolf	15
The Cairn Distillery	Distillery which offers tours to visitors	15

Source: VisitScotland (2023). Google Maps. TripAdvisor.com.

### 9.2.5 Local Accommodation Providers

Accommodation providers were identified using VisitScotland’s accommodation database and through a web search of local accommodation on TripAdvisor. As shown in Table 9-4, 168 accommodation providers were identified within 15 km of the Proposed Development.

Although accommodation providers are distributed across the Local Area, there are larger clusters located in Aviemore, Carrbridge, Grantown-on-Spey, Boat of Garten and Nethy Bridge, all located to the South and Southeast of the Proposed Development. There are also smaller clusters around Tomatin to the East and Carnoch to the North.



There are four accommodation providers within 5 km of the Proposed Development, a further 33 providers between 5 km and 10 km, and 131 between 10 km and 15 km.

**Table 9-4 Local Accommodation Providers**

Distance from Nearest Turbine	Hotel	B&B	Self-Catering	Campsite/ Caravan Park/ Hostel	Total
0-5km	0	1	2	1	4
5-10km	2	4	27	0	33
10-15km	7	10	108	6	131
<b>Total</b>	<b>9</b>	<b>15</b>	<b>137</b>	<b>7</b>	<b>168</b>

Source: VisitScotland (2023). Google Maps. TripAdvisor.com.

### 9.2.6 Recreational Trails and Core Paths

There are multiple core paths<sup>14</sup> within 15km of the site for the Proposed Development.

A series of recreational trails within 15km of the Proposed Development were also identified through the portal Walkhighlands. There are set out in Table 9-5 below alongside a description of them and their distance from the Proposed Development.

**Table 9-5 Recreational Trails**

	Description	Distance to Closest Turbine (km)
Archer's Stone and Wade's Road, Slochd	13km route with views over Slochd viaduct towards pine woodland and a memorial to a local archer	5
Docharn Woods circuit, Carrbridge	8km circular walk through Docharn Woods, with views of the Cairngorms	6
Ellan Wood and the river, Carrbridge	5km route through a pine wood outside Carrbridge with a riverside section	6
Càrn na h-Easgainn, near Moy	6km track through birchwoods over moors to the summit of the hill Càrn na h-Easgainn	10
Loch Vaa, near Aviemore	4km route through pinewoods circling a loch	11

<sup>14</sup> The Highland Council (2024), Paths in the Highlands. Available: [https://www.highland.gov.uk/info/1225/countryside\\_farming\\_and\\_wildlife/161/outdoor\\_access/4](https://www.highland.gov.uk/info/1225/countryside_farming_and_wildlife/161/outdoor_access/4)



Loch Garten and Garten woods	9km route through pinewoods towards Loch Garten and Loch Mallachie	12
Dulnain Bridge & Curr Woods, Dulnain Bridge	9km circular walk from Dulnain Bridge through Curr Wood, with views over Strathspey to the Cairngorms	12
Speyside Way	A 137 km long distance route between Newtonmore and Buckie	12
River Spey circuit	11km circular route along the banks of the River Spey with views of the Cairngorms	13
Dreggie & Glen Beg	9km circular walk climbing above Grantown with views of the Cairngorms and sections along the River Spey	13
Castle Roy circuit	6km route from Nethy Bridge with views of the ruins of a 13 <sup>th</sup> century fortress	14
Beachen Wood, Grantown-on-Spey	6km circuit through woodland with views of the Cairngorms	14
Viewpoint walk, Grantown-on-Spey	5km circular route through deciduous woodland with views over Grantown-on-Spey and the Cairngorms in the distance	15
Ryvoan Pass - Glenmore to Nethy Bridge	15km route with views of a lochan and Abernethy Forest	15
Nethy Bridge riverside and Dell woods	3km walk along the River Nethy to a pine forest	15
Aviemore Orbital	8km route around Aviemore through woodland and along the River Spey	15
Abernethy Forest and Lyngarrie circuit	11km walk through parts of a natural pine forest, along a riverside path, with views of the Cairngorm mountains	15
Dava Way	38 km long distance trail between Grantown-on-Spey and Forres	15
River Spey & Old Railway,	3km route along an old railway line with sections along the River Spey with views of woodland and farmland	15

Source: Walkhighlands (2023), Search Walks



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## 9.3 Assessing the Relationship Between a Wind Farm Development and the Tourism Economy

Tourism and recreation assessments focus on the tourism economy, as defined by the spending of visitors and the employment supported by the sector. For a change in spending to take place, it is necessary that, 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. In turn, this decision has to lead to a fall in the employment and spending by visitors at a given attraction or accommodation provider.

As recorded in visitors' surveys, visitors tend to spend time in a given area for a range of reasons. These include, for instance, scenery and landscape; history and culture; and the place's reputation.

When considering individual tourism sites, the extent to which they are susceptible to change in their surroundings varies, based on:

- their relative importance for the local tourism economy;
- their 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.).

In addition, the scale of the impact on the surroundings of a wind farm development is expected to depend on factors, including:

- distance from the Proposed Development; and
- the interaction between the Proposed Development and the assets' features.

The interaction between the susceptibility to change of an attraction and the extent to which it will be impacted by the development determine the Proposed Development's relative impact. For these changes to have an effect, it is then required that they have an impact on the tourism economy, through reduced spending and a reduction in the employment supported by the sector.

The rest of this chapter considers evidence on wind farms and tourism in Scotland (Section 6.3), and whether Balnespick Wind Farm may affect any of the tourism assets identified in the baseline (Section 6.4).

## 9.4 Evidence on Wind Farms and Tourism

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



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The most comprehensive study of potential effects of wind farms on tourism was undertaken in 2008 by the Moffat Centre at Glasgow Caledonian University<sup>15</sup>. The study was based on what could happen and found that, although there may be minor effects on tourism providers and a small number of visitors may not visit Scotland in the future, the overall effect on tourism expenditure and employment would be very limited.

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.<sup>16</sup>

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<sup>17</sup> 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:

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<sup>15</sup> Moffat Centre (2008), The Economic Impact of Wind Farms on Scottish Tourism.

<sup>16</sup> BiGGAR Economics (2021), Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms

<sup>17</sup> BiGGAR Economics (2017), Wind Farms and Tourism Trends in Scotland



- there are high levels of public support for renewable energy;
- as wind farms are well-established in Scotland, tourists might already expect to see wind farms when visiting Scotland, especially rural Scotland;
- the factors that determine the success of the tourism sector do not include the presence or otherwise of an onshore wind farm; and
- issues that influence tourism include the ability and willingness to travel, economic performance (and so whether tourists have disposable income available for leisure trips), exchange rates, the quality of the overall tourism product, the effectiveness of destination marketing and the quality and value for money of the services offered by tourism businesses.

## 9.5 Impact on Local Tourism and Recreation Sites

Having considered impacts on the local tourism economy over time, the analysis here focuses on whether the Proposed Development could have any impacts on individual attractions, accommodation providers and recreational trails.

### 9.5.1 Visitor Attractions

The tourism and recreation baseline has identified 19 visitor attractions.

There are no attractions located within 5km of the Proposed Development.

Located between 5-10km away from the Proposed Development are 4 visitor attractions.

**Carrbridge Golf Club** is located 6km from the Proposed Development. Visitors would be motivated to visit this attraction if they want to take part in outdoor sports such as golf. **The Tomatin Distillery Visitor Centre**, located approximately 7km from the Proposed Development, attracts visitors who wish to learn about the distilling process and taking part in whisky tastings. **Landmark Forest Adventure Park** is located 7km away and attracts visitors who would wish to use its main attractions including water coasters, a high-rope course, and a butterfly hot-house. **Carrbridge Studio** is also located 7km away from the Proposed Development. This attraction motivates tourists to visit with displays of handmade artwork including paintings, prints and ceramics. As the motivations to visit these attractions would not be impacted by the Proposed Development it is not expected that they would experience any change in tourism activity.

The remaining 15 tourist attractions are located between 10-15km away from the Proposed Development.

The main motivation to visit **Moy Country Fair**, located 10km from the Proposed Development, attracts visitors with the displays and activities on offer on an annual basis. Visitors to **Carrbridge Carriage Driving**, also located around 10km from the Proposed Development, would be motivated to visit by the opportunity to learn how



to drive a horse and cart. **Milton Loch Community Wood** is located 11km from the Proposed Development. The main attraction to visitors who wish to walk and cycle here is the woodland surrounds and the ability to view local wildlife. **Boat of Garten Golf & Tennis Club**, located 12km away, and **Craggan Football** and **Abernethy Golf Club**, both located 15km away, attracts visitors who are interested in taking part in outdoor sports such as golf. **Lochindorb Castle** is located 12km from the Proposed Development and **Castle Roy** is located around 15km away. These attractions would both motivate visitors with an interest in history and historical buildings. **Dulsie Bridge**, located 13km away from the Proposed Development, also attracts visitors with an interest in historical sites, as well as those who wish to experience its views over the River Findhorn. The **RSPB Scotland Loch Garten Nature Centre** is located around 15km from the Proposed Development, and attracts visitors motivated by an interest in flora and fauna and taking part in the guided walks through woodland offered by the centre. Also located 15km away, **The Cairn Distillery** would appeal to visitors with an interest in taking part in distillery tours and tasting experiences. **Escape Cairngorms** is located 15km from the Proposed Development, and attracts visitors who want to take part in indoor escape rooms. It would not be expected that the main motivations to visit these attractions would be impacted by the presence of a wind farm. Consequently, it is not expected that they would experience a change in activity.

A number of tourist attractions benefit from the activities they provide or enable within Cairngorms National Park, which spans over 4,500 square km, with the vast majority located over 15km from the Proposed Development. This includes the **Speyside Centre**, located 12km away from the Proposed Development, and **Nethy Bridge Visitor Centre**, which provide information about the history of the national park and the activities available within it. **Cairngorms Activities** is also located 15km from the Proposed Development. This centre attracts visitors who want to take part in outdoor activities such as climbing and canoeing in the Cairngorms National Park. The majority of the National Park located over 15km from the Proposed Development, and it is not expected that the motivations of visitors interested in taking part in the activities these attractions offer would be impacted by the Proposed Development. Therefore, it is not expected that they would experience a change in tourism activity.

### 9.5.2 Tourism Accommodation

The tourism baseline has identified 168 accommodation providers located within 15km of the Proposed Development. They are clustered primarily around the areas of Aviemore, Carrbridge, Grantown-on-Spey, Boat of Garten and Nethy Bridge, all located to the South and Southeast of the Proposed Development, with some smaller clusters around Tomatin to the East and Carnoch to the North. Most of the accommodation providers available in the area were self-catering providers.





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There are 4 accommodation providers located within 5km of the Proposed Development, including two self-catering providers, one B&B, and one camp site. The B&B marketed itself based on the views and access to the B&B's garden, its location proximate to local tourist attractions including Tomatin Distillery, and the provision of breakfast. The self-catering providers marketed additional amenities provided such as games rooms, firepits, and ensuite bathrooms, as well as access to equipment for outdoor activities such as biking, canoeing, and tennis. They also highlighted visitors' access to expansive grounds and opportunities to view local wildlife. The campsite highlighted its provision of glamping pods and additional amenities such as outdoor fireplaces and private parking, as well as its proximity to Inverness. These main motivations to visit are unlikely to be impacted by the Proposed Development. It is therefore not expected that these providers would experience a change in activity.

There are 33 accommodation providers located between 5-10km from the Proposed Development, including 27 self-catering providers, four B&Bs and two hotels. Self-catering providers in the area marketed themselves based on amenities such as access to private gardens. B&Bs in the area highlighted amenities such as ensuite bathrooms and access to gardens, as well as their provision of breakfast. The hotels in the area marketed themselves based on their restaurants, with one provider also highlighting their status as a wedding and conferencing venue. Providers of all types also highlighted their location proximate to local tourist attractions and access to activities such as golfing, shooting, fishing, and bird watching, as well as local walking routes. Many providers also marketed themselves based on their positions near Cairngorms National Park. These benefits for guests would not be impacted by the presence of a wind farm. It is therefore not expected that the accommodation providers would experience a change in tourist activity.

The remaining 131 accommodation providers are located between 10-15km from the Proposed Development, including 108 self-catering providers, ten B&Bs, fifteen hotels, three campsites, one caravan park, one holiday park and one bunkhouse. The self-catering providers marketed themselves based on amenities such as private gardens, fitted kitchens and hot tubs. Hotels in the area marketed themselves based on the quality of their restaurants as well as features such as beer gardens and activities such as clay pigeon shooting and fishing. B&B providers marketed themselves based on provided amenities such as access to gardens and their provision of breakfast. Providers of all types highlighted their proximity to local tourist attractions and walking routes, as well as outdoor activities such as cycling, golf, and fishing. The campsites, caravan parks and bunkhouse in particular marketed themselves based on their location near the Cairngorms National Park, emphasising themselves as ideal places to stay for people undertaking outdoor activities in the National Park during the day. These providers also highlighted amenities such as access to electricity and showers. A number of the providers also emphasised the ability to view wildlife including squirrels, deer, and birds. As these



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motivations to visit would not be impacted by the Proposed Development, the effect on these providers has been assessed as negligible.

### 9.5.3 Recreational Trails and Core Paths

The tourism assessment identified 19 recreational trails located within 15km of the Proposed Development at the closest point.

There is one recreational trail located within 5km of the Proposed Development at the closest point. **Archer's Stone and Wade's Road, Slochd** begins approximately 5km from the Proposed Development and benefits from areas of regenerating Scots Pine and a memorial to a local archer. As these motivations to take the route would not be impacted, it is not expected that it would experience any effect on tourism activity.

There are three routes which pass within 5-10km from the Proposed Development at the closest point. This includes **Docharn Woods circuit, Carrbridge** and **Ellan Wood and the river, Carrbridge**, both located approximately 6km away. Both routes benefit largely from their routes through pinewoods. **Càrn na h-Easgainn, near Moy** is located around 10km from the Proposed Development at the closest point, and attracts visitors with its route through birchwoods to the summit of a hill with extensive views on all sides, including of an existing wind farm. It is not expected that any of the major motivation to take these routes would be impacted by the Proposed Development, and they would therefore be unlikely to experience any change in tourism activity.

The remaining 15 routes are located between 10-15km from the Proposed Development at the closest point. **Loch Vaa, near Aviemore** and **Loch Garten and Garten woods** are located 11km and 12km away from the Proposed Development, respectively. Both trails attract visitors with their routes through pinewoods and along the banks of lochs. **Dalnain Bridge & Curr Woods, Dalnain Bridge** is located 12km away, and also benefits from a route through woodland, as well as views over Strathspey and the Cairngorms to the South in the opposite direction of the Proposed Development. **Speyside Way** is a long-distance walking route which passes within 12km of the Proposed Development and **River Spey circuit** passes within 13km. Both trails mainly benefit from their routes along the banks of the River Spey. **Castle Roy circuit** is located around 14km from the Proposed Development, and attracts visitors with its views of a 13<sup>th</sup> century fortress. A number of routes mainly benefit from their views over the Cairngorms, away from the Proposed Development, including **Dreggie & Glen Beg, Grantown on Spey**, located 13km away, **Beachen Wood, Grantown-on-Spey**, located 14km away, and **Viewpoint walk, Grantown-on-Spey** and **Abernethy Forest and Lyngarrie circuit**, both located 15km away from the Proposed Development. **Ryvoan Pass - Glenmore to Nethy Bridge, Nethy Bridge riverside and Dell woods**, and **Aviemore Orbital** are all located 15km from the Proposed Development at the closest point. These trails largely attract



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visitors with their routes through woodland, as well as parts traversing along the sides of rivers and a loch. **River Spey & Old Railway**, located 15km away, also benefits from its route along a river as well as views of woodland and farmland. **Dava Way** is a long distance 38km route which connects Grantown-on-Spey and Forres, and passes within 15km of the Proposed Development for a relatively small section of the walk. It is not expected that the motivations to take the routes would be impacted by the Proposed Development, and it is therefore unlikely that they would experience any impacts on tourism activity.

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.

## 9.6 Summary of Tourism Impacts

Research on the relationship between has demonstrated that there is no evidence to suggest that the development of onshore wind farms in Scotland has a negative effect on the tourism economies of the country as a whole, local authority areas or the immediate areas surrounding wind farms. An assessment of the specific local tourist attractions, accommodation providers, and recreational trails in the area suggests that it is unlikely the tourism economy of the area surrounding Balnespick Wind Farm would experience negative effects on the tourism economy.



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## **Appendix 3: MoU with Tomatin Distillery**

**Memorandum of Understanding (MoU)**

Between

**Fred. Olsen Renewables Limited**

and

**Tomatin Distillery Company Limited**

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**Memorandum of Understanding relating to the connection of a 6MW private wire  
from Balnespick Wind Farm to Tomatin Distillery**

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Between

- (1) Fred. Olsen Renewables incorporated under the Companies Acts (Registered Number 13633932) and having their Registered Office at 2<sup>nd</sup> Floor, 36 Broadway, London, England, SW1h 0BH (**the Company**); and
- (2) Tomatin Distillery Company Limited incorporated and registered with company number SC095810 and having their registered office at Tomatin, Inverness-shire, IV13 7YT (**the Organisation**).

Together referred to in this MoU as the parties.

## 1. BACKGROUND

The Company has been developing and operating wind farms in the UK since the mid-1990s and is one of the leading independent power producers in the UK.

FOR has been at the forefront of innovation across the renewables sector and recognises that the development of Bainespik Wind Farm (**the Proposed Development**) in the Scottish Highlands presents a substantial opportunity to

- Supporting the local economy and a local business to benefit directly from the electricity produced at the Proposed Development;
- Support Scotland's whisky sector in line with NetZero ambitions; and
- Nurture enthusiasm and interest in renewables, building skills and supporting the next generation of renewables professionals

## 2. AIM

The aim of this MoU (Aim) is to establish the parameters of a collaborative engagement and working relationship between the Company and the Organisation. This will enable the Organisation to work with the Company to explore and promote the potential of a 6MW private wire system between the Proposed development and Tomatin Distillery. Subject to the successful completion of feasibility studies, the private connection will provide up to 8MW of electricity to the renewable heat system being explored separately to this MoU. It is understood that Caldera will be undertaking the feasibility study for the renewable heat system.

## 3. BOTH PARTIES RESPONSIBILITIES TO ACHIEVE THE AIM

3.1 To support the Aim of this MoU, the parties will:

- 3.1.1 work in partnership to achieve the Aim, including promoting the connection to highlight the opportunities it provides for energy security, how it supports the wider community, the renewable energy industry and Scotland's NetZero ambitions;
- 3.1.2 work together to define the route between the Proposed Development and the Distillery, including collaborating on consultations with the relevant authorities; and
- 3.1.3 work together to agree the environmental and engineering survey requirements and costs associated with the route required for the private wire connection.

## 4. GOVERNANCE AND REPORTING

- 4.1.1 Both parties shall not, for the longer of the duration of the MoU or a period of five years after the Effective Date, disclose to any third party or third parties any Confidential Information without express prior written consent.
- 4.2 Both parties may disclose Confidential Information:



4.2.1 to its employees, officers, representatives or advisers who need to know such information for the purposes of delivering the Aim of the MoU. Both parties should ensure their employees, officers, representatives or advisers to whom it discloses the Confidential Information comply with this clause 4; or

4.2.2 as may be required by law, a court of competent jurisdiction or any governmental or regulatory authority.

4.3 Both parties shall not use the Confidential Information for any other purpose other than in the delivery of the Aim of this MoU.

**5. LEGAL BASIS OF THIS MOU AND LIABILITY**

5.1.1 This MoU is not intended to be contractually binding in a court of law or to give rise to any other legally enforceable rights or obligations. This MoU is intended to outline intent.

5.2 This MoU does not constitute an offer to purchase or to supply services or goods on the terms set out in this document or at all. The parties shall not be deemed to be an agent of the other party and neither party shall hold itself out as having authority or power to bind the other party in any way.

**6. DURATION, VARIATION AND TERMINATION**

This MoU shall become effective once signed on behalf of each of the Company and the Organisation (the **Effective Date**).

This MoU will terminate on the date of any planning consent for the private wire.

Either Party may terminate this MoU upon 14 days written notice to the other party.

**7. DEFINITIONS**

"Confidential Information" means all information relating to the Company, FOR or Organisation which is of a commercially sensitive nature including (but not limited to) data, know-how, techniques, formulas, processes, designs, sketches, photographs, plans, drawings, diagrams, specifications, samples, reports, documents, customer lists, price lists, studies, business plans, business judgements, findings, inventions and ideas which the parties intend to keep confidential which is disclosed by the Company, FOR or Organisation for use in or in connection with this MoU, and this MoU and its contents; and

"Private wire" means any part of the private connection between the Proposed Development and Tomatin Distillery.

Signed for and on behalf of the Company

Signature: 

Name: 

Position: 

Date: 27.11.24



Signed for and on behalf of the Organisation

Signature:



Name:



Position:



Date:

27th November 2024



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BiGGAR Economics, Shandwick House,  
67 Shandwick Place, Edinburgh, Scotland EH2 4SD

info@biggareconomics.co.uk

**biggareconomics.co.uk**

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