

Socio-Economic Impact Assessment of Cairnoch Hill Wind Farm

A report to Eurowind Energy Limited
July 2026





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1.

Executive Summary

Cairnoch Hill Wind Farm is a proposed onshore wind development located immediately north of the Carron Valley Reservoir, within the administrative boundary of Stirling Council, being developed by Eurowind Energy Limited (the Applicant). The Site is situated near the borders of North Lanarkshire, East Dunbartonshire and Falkirk. The proposed development would consist of four turbines, with an installed capacity of up to 30MW.

The National Planning Framework 4 (NPF4) states that energy projects will only be supported if they can demonstrate that they will maximise the net economic impact. The assessment of whether Cairnoch Hill Wind Farm will maximise these benefits is based on the commitments and actions that the developer has taken on **supply chain development, skills development, the empowerment of communities** and balancing the development with **environmental protection and enhancement**. This considered both what the Applicant has direct control over, and how it can enable others to have a positive impact across these areas.

It was estimated that during the development and construction phase, which is expected to cost approximately £47.2 million, Cairnoch Hill Wind Farm could generate:

- £2.4 million Gross Value Added (GVA) and support 28 years of employment in Stirling; and
- £13.7 million GVA and 151 years of employment in Scotland.

During development and construction, the main opportunities for local suppliers would be related to the balance of plant contracts, including plant hire, civil engineering and construction, fencing, and other skilled trades activities.

On average in each year of its 40-year operational life, Cairnoch Hill Wind Farm is expected to generate:

- £0.5 million GVA and 2 jobs in Stirling; and
- £1.2 million GVA and 7 jobs in Scotland.

Furthermore, the Cairnoch Hill Wind Farm is expected to make an annual contribution of £0.4 million in non-domestic rates and £15.3 million across its 40-year operational lifespan.

This economic activity, and the commitments outlined above, will contribute to the **human, economic, social and natural capital** of Stirling. This will increase the resilience of these communities and support their long-term economic development.

The Applicant is developing a number of individual sites across Scotland. To maximise the socio-economic benefits of these projects, the Applicant is leaning into

its Scandinavian roots, seeking to be a catalyst for collaboration with other developers and community stakeholders in the areas it is operating.

The Applicant commits to the following actions under each of the areas of development to maximise benefits.

1.1 Supply Chain



- Work with and take up membership where appropriate of economic development bodies like the Forth Valley Chamber of Commerce, utilising their existing procurement channels and supply chain links to identify potential local suppliers, post consent.
- Share information on potential local suppliers with Tier 1 contractors to support local subcontracting.
- Drive collaboration with other developers to support a minimum of one supplier engagement activity, such as a “meet the buyer” event, on a group basis.
- Apply progressive procurement practices, including early communication of requirements, to support SME participation.
- Publish statistics on local content.

1.2 Skills Development



- Commit to fair and inclusive employment policies at a corporate level, with the process for Living Wage accreditation already underway.
- Where appropriate, engage collaboratively with local education providers and other renewable developers to raise awareness of opportunities in the sector and organise a career pathway day for students.
- Encourage Tier 1 contractors to support apprenticeships, training, and upskilling opportunities.

1.3 Community Empowerment



- Establish a community benefit fund aligning with evolving Scottish Government and official best-practice guidance.
- Work with the community to inform the package of community benefits to address local priorities and aspirations.
- Develop proposals for a community ownership offer to present to the local community.



1.4 The Environment

- Consider proportionate opportunities for environmental enhancement where these are compatible with site conditions and project scale including those outlined in the Habitat Management Plan.
- Where appropriate for health and safety, maintain open public access post-construction for recreational access to the site.
- Align policies with Forestry Land Scotland to work collaboratively and alleviate challenges.
- Deliver and monitor commitment on net positive impact on biodiversity.

1.5 Cairnoch Hill Wind Farm

The assessment of Cairnoch Hill Wind Farm has found that the approach taken is:

- **Place-based** and rooted in the context of Stirling;
- **Innovative** in its approach to maximising benefits;
- **Collaborative** with other developers, communities and public bodies;
- **Transparent**, including a commitment to impact evaluation;
- **Flexible** enough to meet the evolving needs of the community; and
- **Deliverable** and an environment will be created to allow communities to deliver those benefits which are enabled by the wind farm.

Based on this above assessment, it is concluded that the Applicant's approach to Cairnoch Hill Wind Farm is consistent with Policy 11c of NPF4 on maximising net economic benefits.



2.

Introduction

This report presents an assessment of the economic impact of Cairnoch Hill Wind Farm as well as evaluation of the maximisation of benefits.

2.1 Background

Located immediately north of the Carron Valley Reservoir, within the administrative boundary of Stirling, approximately 6km east of Fintry, Cairnoch Hill Wind Farm (the Proposed Development) is expected to comprise of four turbines with a total installed capacity of up to 30MW.

The objectives of this study include:

- Outlining the strategic context in which the Proposed Development falls under;
- Presenting the existing socio-economic conditions and tourism drivers of the relevant study areas which the Proposed Development may impact;
- Evaluating whether the proposed actions of the developer meets the requirements of NPF4; and
- Quantifying the potential economic and fiscal impacts of the Proposed Development.

2.2 Report Structure

The report is structured as follows:

- Section 3 - considers a range of strategic context documents ranging from national to local strategies;
- Section 4 - provides a socio-economic context;
- Section 5 - provides an overview of the main tourism drivers in the Local Area and considers the relationship between the Proposed Development and the local tourism assets;
- Section 6 to 9 - assesses the commitments of the Developer in relation to NPF4; and
- Section 10 - quantifies the potential economic impact of the Proposed Development across the construction and operations phase.

3.

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)¹ 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:

¹ Scottish Government (2024), Scotland’s National Performance Framework.

- Children and young people: grow up loved, safe and respected so that they realise their full potential;
- Communities: live in communities that are inclusive, empowered, resilient and safe;
- Culture: are creative and their vibrant and diverse cultures are expressed and enjoyed widely;
- Economy: have a globally competitive, entrepreneurial, inclusive and sustainable economy;
- Education: are well educated, skilled and able to contribute to society;
- Environment: value, enjoy, protect and enhance their environment;
- Fair work and business: have thriving and innovative businesses, with quality jobs and fair work for everyone;
- Health: are healthy and active;
- Human rights: respect, protect and fulfil human rights and live free from discrimination;
- International: are open, connected and make a positive contribution internationally; and
- Poverty: tackle poverty by sharing opportunities, wealth and power more equally.

3.1.2 Scotland's National Strategy for Economic Transformation

In March 2022, the Scottish Government released the National Strategy for Economic Transformation,² 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

² Scottish Government (2022), National Strategy for Economic Transformation.

- 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 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,³ 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 Stirling and Scotland.

3.1.4 National Planning Framework 4

The NPF4⁴ is Scotland's national spatial strategy, setting out the principles to be applied to planning decisions, regional priorities and national developments.

³ Scottish Government (2023), Onshore Wind Sector Deal.

⁴ Scottish Government (2023), National Planning Framework 4.

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

As part of the policy 11(a), all forms of renewable technologies, including onshore wind and energy storage, will be supported. This is subject to the test outlined in Policy 11(c), which states that: “development proposals will only be supported where they maximise net economic impact, including local and community socio-economic benefits such as employment, associated business and supply chain opportunities”. The Proposed Development will support employment and create opportunities for local businesses at both the construction, 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; and
- **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 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 Statement⁵ 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,⁶ 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.

⁵ Scottish Government (2021), Local Energy Policy Statement.

⁶ Scottish Tourism Alliance (2012), Tourism Scotland 2020.

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.⁷

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 Stirling's Economic Strategy 2022 - 2030

The Stirling Economic Strategy 2022–2030⁸ outlines a vision for the future of Stirling's economy, centred around three core themes: thriving, sustainable, and inclusive. This strategy aims to foster economic growth, environmental responsibility, and social equity within the region.

To achieve a thriving, sustainable, and inclusive economy, the strategy identifies several key actions relevant to the Proposed Development:

- **Collaborating with Employability Partners:** Working alongside education providers and employers to ensure all residents have access to fair work and skills opportunities;
- **Community Wealth Building:** Implementing a Community Wealth Building approach for Stirling's anchor institutions to enhance local supply chains, create new jobs, promote fair employment, and encourage shared ownership;

⁷ Scottish Tourism Alliance (2020), Scotland's Outlook 2030.

⁸ Invest in Stirling (2022), Stirling's Economic Strategy 2022-2030

- **Embracing the Green Economy:** Leveraging economic opportunities within the green sector and supporting the transition to net zero, aligning activities with the 2030 and 2045 greenhouse gas targets;
- **Promoting Higher Value Employment:** Focusing on higher value jobs to reduce inequalities and increase median wage levels in Stirling; and
- **Increasing Local Procurement:** Enhancing local and regional procurement spending by Stirling's anchor institutions and supporting other organisations to do the same, facilitating access to public contracts for local businesses and the third sector.

The strategy recognises a gap in regional skills required for delivering the demands of net zero, highlighting the need for investment in technical green jobs.

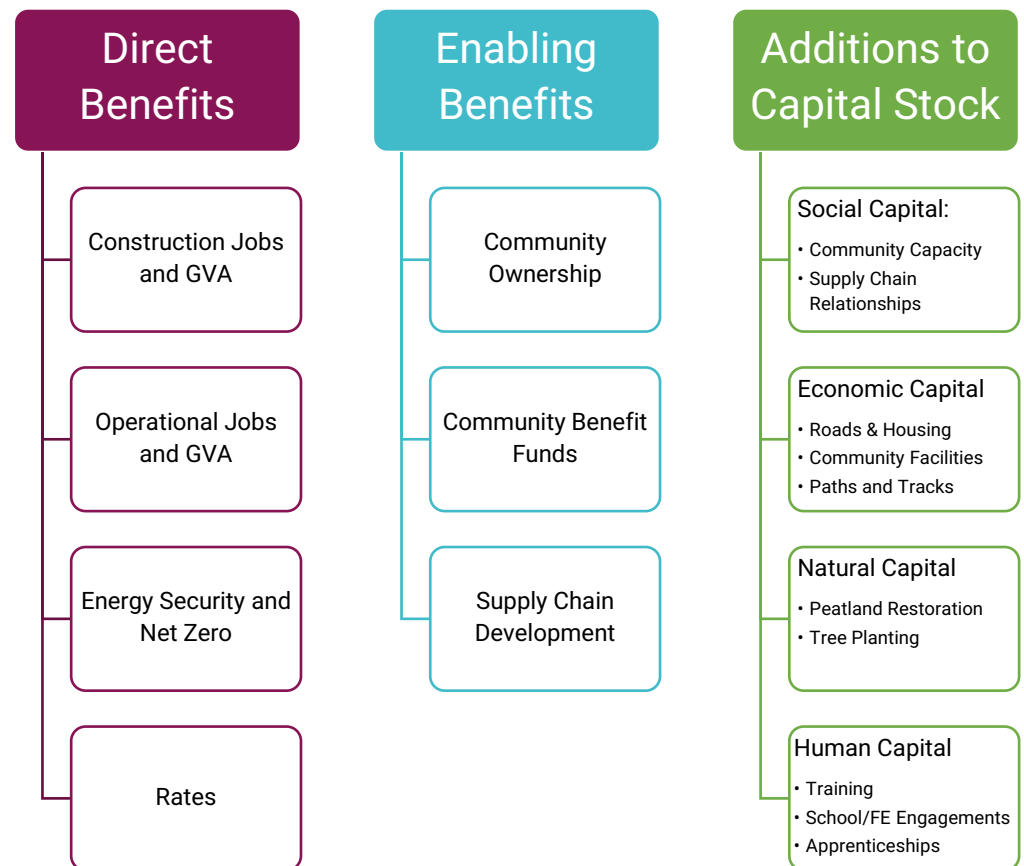
The Proposed Development aligns with and supports these strategic priorities by creating fair employment opportunities and driving economic growth. It contributes to local benefits through supply chain opportunities and plays a significant role in the energy transition. Additionally, it may contribute to the reduction of inequalities by providing fair work opportunities and helping to provide cheaper, stable electricity.

3.3 Maximising Net Economic Benefits

The purpose of this report is to consider how the Applicant will maximise the net economic impact of Cairnoch Hill Wind Farm. This will consider the different types of benefits that are generated by onshore wind projects. Examples of these are given in Figure 3-1, and this covers:

- **Direct Benefits** – these are the benefits and impacts over which the developer has direct control and can most easily influence. This can include the economic impacts generated by the projects and their contribution to public policy and public finances;
- **Enabling Benefits** – many of the potential positive impacts associated with an onshore wind farm are not within the control of the developer. These can include how communities invest any funding made available and how the supply chain builds capacity through the project. However, the developer can influence and support these organisations and individuals to maximise these enabling benefits and therefore it is appropriate to consider how the developer is working to maximise these enabled benefits; and
- **Additions to Capital Stocks** – the development of an onshore wind project should leave the local communities wealthier across all types of capital stock, including human, social, economic and natural capital.

Figure 3-1 Types of Benefits from Onshore Wind in Scotland



In 2025, Scottish Renewables⁹ published guidance to help developers deliver and enhance local benefits. This guidance sets out six principles that can be used to assess whether a project has been developed in a way that is likely to achieve the objective of maximising socio-economic benefits. These include:

- Place-based: every project and every community is slightly different, so packages of benefits that are tailored around the needs and capacity of the community in question are likely to generate greater benefits than a standardised approach;
- Innovative: many of the benefits that have been realised by renewables to date have happened because of innovation at the project level. To maintain this culture of continuous improvement developers must continue to innovate;
- Collaborative: many of the benefits of renewable energy developments are not directly within the gift of developers. They will require input and support of others in the public, private and third sector to realise, making a collaborative approach essential;
- Transparent: effective collaboration requires the parties involved to trust each other and an open and transparent approach is crucial for establishing this trust;

⁹ Scottish Renewables, (2025), Maximising N-Economic Benefit of Renewable Energy Guidance and Reporting Framework

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- Flexible: a lot can change between project inception and completion, and these changes can make a big difference to the benefits ultimately realised. A flexible approach that responds positively to such changes is therefore important; and
 - Deliverable: providing communities with realistic expectations about what can be delivered during the construction and operation phase of a project will help achieve trust with relevant stakeholders.

These principles highlight that in considering whether Cairnoch Hill Wind Farm maximises net economic impact, it is necessary to consider both the economic impacts that are expected and the approach that the Applicant is taking to ensure these benefits are consistent with community needs.

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

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, comprising the electoral wards of Stirling West and Forth and Endrick;
- Stirling;
- The Wider Region, comprising Stirling, Falkirk, East Dunbartonshire and North Lanarkshire; and
- Scotland.

4.2 Demographics

4.2.1 Population Estimates

In 2024, the Local Area had a population of 26,170, accounting for 28% of the total population of Stirling (94,210), and 3.7% of the Wider Region.

In the Local Area, people of working age (16 to 64) accounted for 60.4% of the population, relatively lower than the share accounted for by this demographic in Stirling (63.3%), the Wider Region (62.8%) and Scotland as a whole (63.3%).

The share of the population in the Local Area aged 65 and older was 22.9%, greater than in Stirling (21.1%), the Wider Region (20.2%), and the national average (20.5%).

Table 4-1 Population Estimates, 2024

	Local Area	Stirling	Wider Region	Scotland
Total	26,170	94,210	708,740	5,546,900
0-15	16.7%	15.6%	17.1%	16.2%
16-64	60.4%	63.3%	62.8%	63.3%
65+	22.9%	21.1%	20.2%	20.5%

Source: National Records of Scotland (2025), Mid-2024 population estimates Scotland. National Records of Scotland (2022). Electoral Ward population estimates by sex and single year of age, mid-2021.

4.2.2 Population Projections

Over the period between 2024 and 2047, the total population of Stirling is projected to increase by 2.9%, from 94,210 to 96,940. During the same period, the population of Scotland is projected to increase by 4.1%.

The share of the total population accounted for by working age people in Stirling is projected to increase from 63.3% to 63.8%. In Scotland, the share of the population aged 16-64 is projected to fall from 63.3% to 60.9%.

During the same period, it is expected that the share of the population aged 65+ will rise from 21.1% to 22.5% in Stirling, and the share of the population aged 65 and over is projected to increase from 20.5% to 25.0%.

These demographic trends suggest that a declining working age population in Scotland will have to support an increasingly ageing population. Conversely, Stirling and the Wider Region see a slight increase in the working age population, alongside an increase in the population aged 65+. As Scotland's population ages, it will become increasingly important for Stirling to attract and retain people of working age.

Table 4-2 Population Projections, 2024-2047

	Stirling		Wider Region		Scotland	
	2024	2047	2024	2047	2024	2047
Total	94,210	96,940	708,740	712,700	5,546,900	5,782,680
0-15	15.6%	13.7%	17.1%	14.9%	16.2%	14.0%
16-64	63.3%	63.8%	62.8%	63.3%	63.3%	60.9%
65+	21.1%	22.5%	20.2%	21.8%	20.5%	25.0%

Source: National Records of Scotland (2025), Population Projections 2024-2047 (2022-based).

4.3 Industrial Structure

Table 4-3 shows the industrial structure of the focus areas, the largest employer by sector in the Local Area is human health and social work activities. This sector employs 32.0% of workers in the Local Area and 18.7% of workers in the Wider Region, both above average when compared to Stirling (12.6%) and Scotland as a whole (16.2%). The second sector that employs the most in the Local Area is accommodation and food service activities, 12.7%, larger than the share in the Wider Region (6.3%) and Scotland as a whole (8.1%).

There is little diversification in employment in the Local Area, with over 55% of the workforce employed in just 3 sectors, the area is vulnerable to economic shocks that may affect those sectors. The Proposed Development should offer a more diverse array of job opportunities for the local workforce.

The construction sector accounts for 4.8% of workers in the Local Area. In Stirling and the Wider Region, the construction sector is a significant employer, employing 7.3% and 8.8% of workers, respectively. This is above average compared to the level of employment represented by this sector across Scotland as a whole (5.9%). This suggests that businesses in Stirling and the Wider Region are in a position to benefit from contracts associated with the construction of the Proposed Development.

Table 4-3 Industrial Structure, 2024

	Local Area	Stirling	Wider Region	Scotland
Human health and social work activities	32.0%	12.6%	18.7%	16.2%
Accommodation and food service activities	12.7%	10.5%	6.3%	8.1%
Public administration and defence	11.1%	5.2%	7.3%	6.5%
Education	8.4%	9.4%	6.2%	8.3%
Wholesale and retail trade	5.4%	14.6%	14.0%	12.5%
Professional, scientific and technical activities	5.4%	6.3%	5.1%	7.2%
Construction	4.8%	7.3%	8.8%	5.9%
Administrative and support service activities	4.2%	7.3%	7.3%	6.4%
Manufacturing	3.3%	4.2%	8.1%	6.9%
Agriculture, forestry and fishing	2.7%	3.7%	1.1%	3.1%



Arts, entertainment and recreation	2.7%	4.2%	2.9%	3.0%
Real estate activities	2.1%	1.9%	1.1%	1.6%
Other service activities	1.8%	1.9%	1.8%	1.9%
Information and communication	1.5%	4.2%	2.1%	2.7%
Financial and insurance activities	0.7%	3.1%	1.5%	3.4%
Transportation and storage	0.5%	2.6%	6.3%	4.1%
Total Employment	8,285	47,800	281,155	2,640,000

Source: Office for National Statistics (2026), Business Register and Employment Survey (BRES) 2024

4.4 Economic Activity

In 2025 the unemployment rate in Stirling (4.2%) was higher than average compared to the Wider Region (3.5%) and slightly higher than average compared to Scotland as a whole (3.7%).

The economic activity rate was above average in Stirling (78.3%) compared to the Wider Region (77.2%) and Scotland as a whole (76.9%).

Median annual gross incomes for residents in Stirling (£33,832) and the Wider Region (£33,990) were above average when compared to the entirety of Scotland (£33,061).

Table 4-4 Economic Activity, 2024

	Stirling	Wider Region	Scotland
Economic Activity	78.3%	77.2%	76.9%
Unemployment Rate	4.2%	3.5%	3.7%
Median Annual Gross Earnings (resident)	£33,832	£33,990	£33,061

Source: ONS (2025), Annual Population Survey and Annual Survey of Hours and Earnings – resident analysis 2025

4.5 Education

As of 2024, Stirling's working age population had higher levels of qualifications when compared to the Wider Region and Scotland as a whole. The proportion of residents holding an RQF4+ qualification (equivalent to a higher education certificate) was



60.1% in Stirling, compared with 47.9% in the Wider Region and 53.7% across Scotland.

Table 4-5 Qualification Levels, 2024

	Stirling	Wider Region	Scotland
RQF4+	60.1%	47.9%	53.7%
RQF3+	78.2%	66.8%	71.9%
RQF2+	88.7%	84.7%	87.1%
RQF1+	89.2%	85.3%	88.2%
Other Qualifications	3.9%	4.8%	3.5%
No Qualifications	6.9%	9.9%	8.2%

Source: ONS (2025), Annual Population Survey Jan 2024-Dec 2024.

4.6 Summary of Socio-Economic Context

The Local Area features an older age profile, with a relatively higher proportion of people aged 65 and older and a lower proportion of people who are of working age compared to Stirling, the Wider Area, and Scotland. Population projections for Stirling and the Wider Area suggest some growth in the working age population, which would be strengthened by work to actively attract and retain workers to the area.

Although Stirling and the Wider Region have relatively highly educated populations, and higher than average levels of economic activity, these areas also have higher levels of unemployment compared to Scotland as a whole.

The Proposed Development can help address the socio-economic challenges faced locally and regionally by contributing to long-term, high-quality jobs that will retain local talent, attract new residents, and diversify the economy.

5.

Tourism

This section provides an overview of the main tourism drivers in the Local Area and considers the relationship between the Proposed Development and the local tourism assets.

NPF4 does not identify tourism impacts as a material concern for onshore wind development and therefore, a review of the national and local evidence of onshore wind farms on tourism is considered to determine any potential impact according to the existing literature.

The main drivers of tourism to the area within 15 km of Cairnoch Hill Wind Farm are access to recreational activities such as walking, cycling and fishing, as well as the attractions with cultural and historical significance.

5.1 Tourism

5.1.1 Evidence on Wind Farms and Tourism

A number of studies have considered the relationship between wind farm developments and tourism activity.

A study undertaken in 2008 by the Moffat Centre at Glasgow Caledonian University¹⁰ examined the potential effects of wind farms on tourism. The study found that while there could be minor effects on tourism providers, 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.¹¹ 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), employment in tourism related sectors had increased by 20%. At the local authority level, those local authorities which had seen the largest increase in onshore wind energy, also

¹⁰ Moffat Centre (2008) *The Economic Impact of Wind Farms on Scottish Tourism*. [online] The Scottish Government. Available at: <https://www.gov.scot/publications/economic-impacts-wind-farms-scottish-tourism/>

¹¹ BiGGAR Economics (2021) *Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms*. [online] Available at: <https://biggareconomics.co.uk/wp-content/uploads/2021/11/BiGGAR-Economics-Wind-Farms-and-Tourism-2021.pdf>

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 report¹²) 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 data zones within 15 km of each wind farm. Of the 28 wind farms previously analysed, the local areas surrounding 18 of those experienced an increase in tourism employment above the Scottish average, in the years following the construction. Of the local areas surrounding the additional 16 onshore wind farms, 11 experienced increases in tourism employment, which outperformed the Scottish average. These results strongly 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 to suggest that the development of onshore wind farms in Scotland had any negative effects on the tourism economies in the immediate areas surrounding wind farms, the local authority areas, or indeed, across the country as a whole.

These conclusions are not surprising given that:

- Onshore Wind Policy Statement acknowledges that while concerns about the impact on tourism exist, current evidence does not indicate negative effects but instead highlight the potential for developments to support local tourism through improved access, recreational opportunities and community-focused initiatives contributing positively to local economies and aligning with a ‘people and place’ approach;
- There are high levels of public support for renewable energy¹³;
- 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.

¹² BiGGAR Economics (2017) *Wind Farms and Tourism Trends in Scotland*. [online] Available at: <https://biggareconomics.co.uk/wp-content/uploads/2020/01/Wind-farms-and-tourism-trends-in-Scotland.pdf>

¹³ DESNZ (2025). Public Attitudes Tracker: Energy Infrastructure and Energy Sources. Winter 2024, UK. [online] Gov.UK. Available at: <https://www.gov.uk/government/statistics/desnz-public-attitudes-tracker-winter-2024/desnz-public-attitudes-tracker-energy-infrastructure-and-energy-security-winter-2024-uk#:~:text=In%20Winter%202024%20%5Bfootnote%201,from%2026%25%20to%2021%25.>

NPF4 also does not identify tourism impacts as a material concern for onshore wind development that requires examination. Overall, it is accepted that onshore wind does not adversely impact tourism interests.

5.1.2 Accommodation Providers

Accommodation providers were identified using VisitScotland's accommodation database and through a web search of local accommodation on TripAdvisor. In total, 68 accommodation providers were identified within 15km of the Proposed Development, including 30 hotels, 26 B&Bs, and 12 campsites. The majority (47) of these accommodation providers were located between 10km and 15km away from the Proposed Development, with three located within 5km.

5.1.3 Tourism Attractions

To understand the potential impact of the Proposed Development, it is necessary to consider the primary factors that attract visitors to the Carron Valley and surrounding area. Visitor motivation to the area is largely due to outdoor recreation, cultural heritage, and scenic landscapes. Additionally, the strong road connections (approximately 10km from the M80) and close proximity to population centres such as Stirling, Glasgow, and Edinburgh make it easily accessible to many people.

Using sources an online search, a range of tourism attractions within 15km of the Proposed Development have been identified. Those closest, within 5km of the Proposed Development, are described in Table 5-1.

Table 5-1 - Attractions within 5km of the Proposed Development

Attraction	Description
Earls Burn Waterfall	Small waterfall and wild swimming spot.
Dundaff Castle (Sir John de Graham's Castle)	A ruined 12 th century square motte and bailey castle.
Loup of Fintry Waterfall	Waterfall with a 29 metre drop on the River Endrick.
Machar Stones	A pair of Neolithic stones.
Carron Valley Reservoir	A reservoir popular for hiking, mountain biking and fishing.
Duncarron Medieval Village	A modern reproduction of a Middle Ages fortification. A typical residence of a Scottish clan chief from early last millennium.
Carron Valley Fishery	A private member brown trout fishing club.

Table 5-2 describes attractions located between 5km and 15km from the Proposed Development.

Table 5-2 - Attractions Between 5km and 15km from the Proposed Development

Attraction	Type
West Moss-side Organic Farm	Organic farm in Flanders Moss National Nature Reserve.
Blair Drummond Safari and Adventure Park	Safari Park home to over 300 animals on a 120-acre estate.
The National Wallace Monument	A famous landmark commemorating William Wallace, opened in 1869.
Cambuskenneth Abbey from Stirling	Historic Abbey founded in 1140. Famous as the burial place of King James the third.
Stirling Old Town Jail	Former Victorian prison and top-rated visitor attraction.
The Stirling Smith Art Gallery & Museum	Victorian museum housing European art and artefacts.
Church of the Holy Rude	Medieval parish church of Stirling. Founded in 1129.
Stirling Castle	One of the largest and most historically significant castles in Scotland.
The Battle of Bannockburn Visitor Centre	Audio-visual presentations and informative history exhibitions about the historic battle.
Plean Country Park	Country park which was once the grounds for the now ruined Plean House and is now home to a number of walking routes.
Mosswater Local Nature Reserve	A young woodland and floodplain grassland, recently designated as a nature reserve.
Kirkintilloch Golf Club	Golf club established in 1895.
Hayston Golf Club	Golf club and function venue.
Lennox Castle	Built in the 1830s. Opened in 1936 as a hospital for people with learning disabilities.
Campsie Golf Course	Golf course sitting at the foot of Campsie Fells, established in 1897.
Strathblane Falconry	A bird of prey centre situated in the grounds of Strathblane Country House Hotel.

5.1.4 Recreational Walking and Cycling Trails

Table 5-3 outlines recreational trails which pass within 0-5km of the Proposed Development.

Table 5-3 Recreational Trails Between 0km and 5km from the Proposed Development

Attraction	Description
Meikle Bin, Carron Valley	11 km out-and-back hike offering panoramic views of Campsie Fells.
Carron Valley Reservoir Shore Trail	4km loop on the southern shores of the Carron Valley reservoir.
Carron Valley Circular via Peggies Spout	A 12km circular walk South of the Carron Valley Reservoir.
Cairnoch Hill Circular	A 10km circular walk starting on the North shores of the Carron Valley reservoir.
Mountain Biking	8km of red grade mountain biking trails on the Southeastern shore of Carron Valley reservoir.
Carleatheran and Stronend	A hike with panoramic views of the Forth Valley and the Trossachs situated South of Kippen.

Source: Walkhighlands.com

Table 5-4 outlines recreational trails which pass within 5-15km of the Proposed Development.

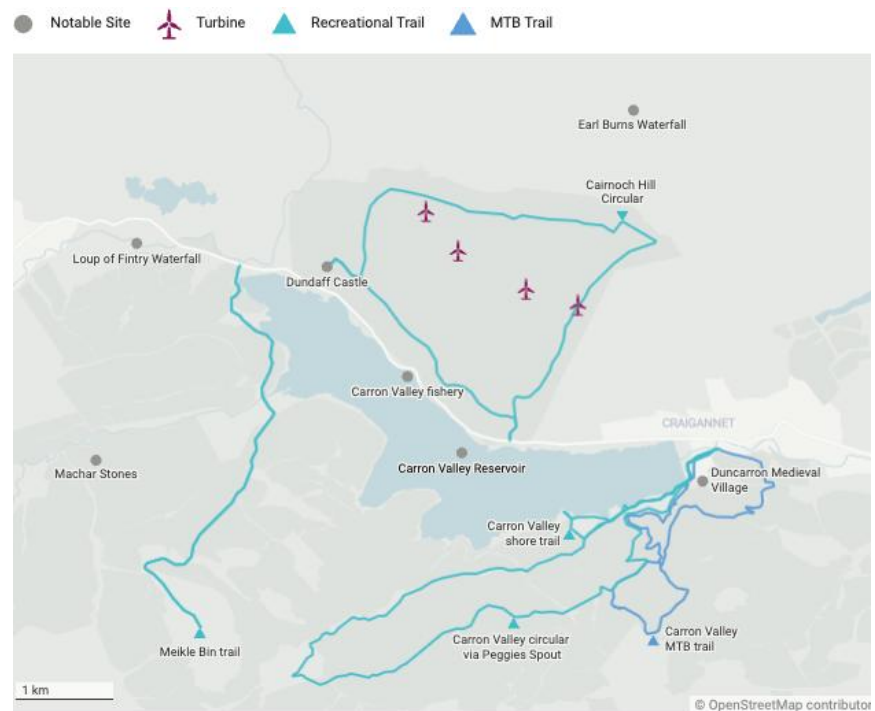
Table 5-4 Recreational Trails Between 5km and 15km from the Proposed Development

Attraction	Type
North Third Reservoir	A walk circling around the North Third Reservoir.
John Muir Way	A long distance walking route from the West to East of Scotland.
Cort-ma Law, near Lennoxton	A 9km horse-shoe shaped trail following the edge of an escarpment of the Campsie Fells.

Source: Walkhighlands.com

Figure 5-1 shows the attractions and recreational amenities within 5km of the Proposed Development.

Figure 5-1 - Cairnoch Hill Wind Farm and Local Tourism Assets within 5km



Made with Datawrapper

5.2 Drivers of Tourism

5.2.1 A Strong Cultural Heritage

The area around the Proposed Development includes a number of attractions related to history and cultural heritage. Within 5km of the Proposed Development, notable sites include Dundaff Castle (Sir John de Graham's Castle) and Duncarron Medieval Village. Within 15km of the Proposed Development, there are attractions such as The Battle of Bannockburn Visitor Centre, Stirling Castle, and the National Wallace Monument.

These attractions will motivate people to the area through their offering of information about the history of the area and the ability to view historical and cultural sites, some of which have been present since the Middle Ages. As the ability to view these historical sites and learn about their cultural significance would not be impacted by the presence of a wind farm, it is not expected that this driver of tourism will be impacted by the Proposed Development, and tourism activity is expected to be unaffected.

5.2.2 Recreation

There are a number of hiking trails within 15km of the Proposed Development, including, Carron Valley Reservoir shore trail, Carron Valley circular via Peggie Spout, Cairnoch Hill circular, and the famous John Muir Way, which traverses from coast to coast through Scotland's central belt. In addition to designated routes, tourists

attractions in the area also offer access to recreational walking, such as Mosswater Local Nature Reserve and Plean Country Park.

The Cairnoch Hill Circular is a 10km loop to the North of the Carron Valley Reservoir, with Strava data suggesting this is a popular route for both walking and mountain biking, which the Proposed Development could improve access to.

The local area around the Proposed Development is also a popular Mountain biking area, with 8km of red-grade trail on the Southeastern shore of the Carron Valley Reservoir. Data from Strava and Trailforks also suggests several mountain biking trails surrounding the Carron Valley Reservoir, including to the Northern edge.

Additionally, Carron Valley reservoir is home to Carron Valley Fishery, a private member fishing club providing visitors with access to recreational angling.

Existing research on the relationship between onshore wind and tourism suggests no relationship between the presence of an onshore wind farm and tourism activity. The prevalence of numerous recreational trails within the area suggests that, should a trail require short-term closure during construction, visitors will have access to numerous other trails, and so this is unlikely to impact tourism activity in the area overall. In addition, it is not expected that the presence of a wind farm during operation will impact tourism activity in the local area, as visitors will continue to be able to choose from a variety of routes, and the Proposed Development will not prevent access to the amenities which enable recreation in the area.

5.3 Summary of Local Tourism

The area surrounding the Proposed Development is home to several sites of historical and cultural importance, attracting visitors with an interest in history. It is not expected that the ability to view these sites and learn about their significance will be impacted by the Proposed Development. In addition, the local area offers a variety of amenities enabling recreational activities including walking, cycling, and fishing. The prevalence of recreational routes and the ability of visitors to take part in recreation is not expected to be impacted by the Proposed Development. It is therefore not expected that the area will experience changes in tourism activity.

6.

Supply Chain

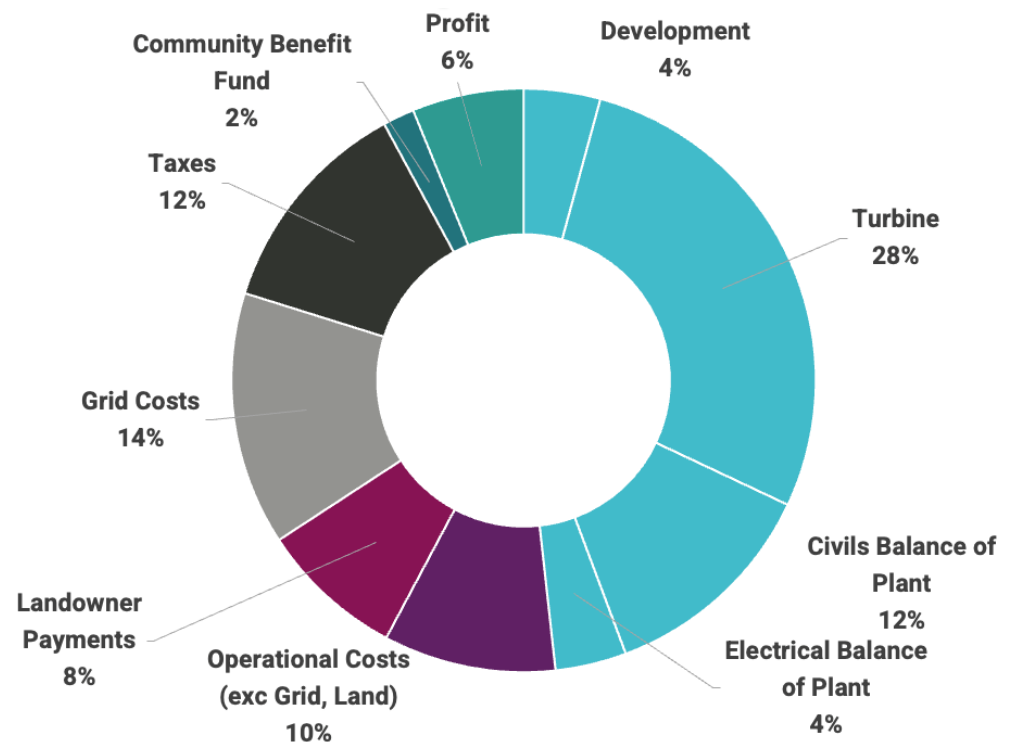
There are supply chain opportunities for the developer to collaborate and implement in Stirling.

6.1 Maximising Benefits through the Supply Chain

As outlined in Section 3.3 and the principles defined in the Guidance from Scottish Renewables, for a project to maximise its socio-economic benefits, it needs to be place-based, innovative, collaborative, flexible, transparent and deliverable.

The supply chain is vital for maximising economic benefits from wind farm development. The distribution of the income of a typical onshore wind farm in Scotland is shown in Figure 6-1. This shows that the majority of the value of an onshore wind farm is captured within various elements of the supply chain. Areas that Scotland has the ability to supply the majority of the work (such as development, the electrical and civil balance of plant and operational activities) account for at least 30% of the value of an onshore wind farm and therefore, maximising the supply chain opportunities from any project is crucial to maximising the net economic benefits of a project.

Figure 6-1 Distribution of Revenue of a Typical Onshore Energy Park in Scotland



Source: BiGGAR Economics Analysis



Building local supply chain capacity allows developers to reduce costs while supporting regional economic growth. This approach brings together national policy and community expectations for local content and job creation.

Onshore wind developers can only utilise a local supply chain if it exists and is competitive at the time the developer needs the goods or services it could provide.



Social Capital

Supply Chain Development can contribute to the development of social capital, in addition to the more obvious contribution to financial capital within these businesses.

The opportunity will be particularly relevant for the Applicant and the Proposed Development because of the number of proposed onshore wind projects that could be progressed in Stirling over the next ten years. The opportunities for repeat work within the business community can create bonds and networks within the supply chain that will encourage cooperation.

6.2 Assessment Approach for the Supply Chain

As outlined in Section 3.3, for a project to maximise its socio-economic benefits, it needs to be place-based, innovative, collaborative, flexible, transparent and deliverable. For maximising benefits through the supply chain, this would mean the developer would need to:

- **Research the local business base**, to understand the capacity to provide the goods and services needed and identify opportunities to support supply chain development;
- Take reasonable steps to **maximise local supply chain content**, including working with Tier 1 contractors to make use of local suppliers;
- Adopt **progressive procurement practices** that make it easier to make use of small local businesses and social enterprises; and
- Support ongoing efforts to **increase regional supply chain capacity** and collaborate with clusters of expertise.

Effective capacity-building requires targeted outreach to raise awareness among local businesses about opportunities. This involves informing suppliers about technical standards, safety requirements and procurement processes and positions them to compete successfully for contracts. Clear communication of requirements and timelines gives local businesses the lead time needed to prepare, enhancing local competitiveness and reducing dependence on distant suppliers.

The supply chain serves as a strategic tool for developers to enhance economic returns, support communities and maximise local benefits in each stage of the development process while also strengthening the renewable energy sector's sustainability and commitment to deliver value.

The rest of this section considers the implications of this for the Proposed Development.

The Applicant recognises the importance of early and proportionate supply chain engagement in maximising the economic benefits associated with Cairnoch Hill Wind Farm. As the Proposed Development is at an early stage of development, the Applicant is proactively seeking to understand the capacity, capabilities, and interests of the local and regional business base and remains open to ideas on how best to facilitate meaningful supply chain participation. This approach reflects the relatively small scale of the Proposed Development, while acknowledging that targeted engagement can still deliver tangible local and national economic benefits.

6.2.1 Understanding the Local Business Base

To support this, the Applicant is committed to engaging with and formally joining the **Forth Valley Chamber of Commerce** post-consent.

Organisations like these are well placed to represent and understand the local business community and membership and engagement will serve as a mechanism to research the local business base and directly promote upcoming procurement opportunities.

The Applicant will work collaboratively with these organisations to develop a database of potential local and regional suppliers. This database will then be shared with Tier 1 contractors appointed to the project, particularly those that may be new to the area, to facilitate local subcontracting opportunities and reduce barriers to entry for smaller businesses.

6.2.2 Proactive Collaboration with Other Developers

The Applicant is an established renewable energy developer operating across 16 countries. In the UK, the Applicant is an SME with a growing portfolio consisting of developments dispersed across Scotland rather than clustered in a single area (as shown in Figure 6-2). This geographic spread, combined with the fact that the Proposed Development is a smaller, four turbine scheme, can present a barrier to actively building knowledge of the local supply chain and identifying local companies which could support the project. For example, as a smaller scheme, the Proposed Development may struggle to independently attract a high turnout for a standalone procurement event.

To counteract this, the Applicant has committed to proactively engaging with other renewable energy developers within the Carron Valley cluster (such as Wind2 or Force 9) prior to planning submission in order to aggregate the regional pipeline. This approach will maximise visibility for suppliers through a synchronised timeline, making attendance highly viable and commercially attractive for local firms. The goal

is to establish regular, informal communication channels that drive collaborative economic initiatives across the local area. This approach reflects what the Applicant has learned from similar experiences of collaborative working, such as the Major Projects Forum on the Western Isles, where its consented Uisenis Wind Farm is located.

Figure 6-2 The Applicant's Projects in Scotland



6.2.3 Collaborative Meet-the-Buyer Events

By clustering with nearby developers, the Applicant will help drive and participate in joint "Meet the Buyer" events. This ensures local plant hire, civil engineering, and construction sub-contractors are given an accessible, clear timeline of contract opportunities across the entire regional pipeline.

A joint approach serves to demonstrate the real economic opportunities coming down the line, giving local businesses a clear pathway to get involved.

6.2.4 Progressive Procurement Practices

The Applicant also recognises the role of proportionate and accessible procurement processes in enabling smaller and locally based businesses to participate in the supply chain. In practice, this means working to reduce unnecessary administrative barriers which may prevent smaller, local companies from bidding to fulfil contracts.

While maintaining appropriate standards for health, safety, security, environment, and quality, the Applicant is committed to ensuring that relevant requirements, such as health and safety obligations, accreditation standards, and competency expectations, are communicated as early as possible and when practical. This approach is intended to give potential suppliers sufficient visibility and time to prepare for participation.

Where feasible, the Applicant will also encourage procurement models that place appropriate responsibility for insurance and risk management at the Tier 1 contractor level, reducing financial and legal barriers for smaller subcontractors further down the supply chain. To ensure these intentions translate into measurable local impact, the Applicant will assess building mandatory expenditure and data reporting obligations directly into the contracts of its Tier 1 suppliers.

6.2.5 Publishing Statistics

As part of its wider Scottish portfolio, the Applicant is committed to reviewing and monitoring its supply chain practices. In relation to the Proposed Development, the Applicant will seek to gather data on supply chain participation during the construction phase and will encourage Tier 1 contractors to support similar data collection and reporting. Where practicable, this information will be used to inform project-level reporting on supply chain outcomes and to support continuous improvement across the wider portfolio.

6.3 Commitments and Monitoring the Supply Chain

The Applicant aims to take a proactive, collaborative and proportionate approach to supply chain engagement for the Proposed Development, supporting local and regional businesses where possible and maximising the net economic benefits arising from the Proposed Development.

Table 6-1 The Applicant Supply Chain Commitments and Monitoring

Commitment
Work with and take up membership where appropriate of economic development bodies like the Forth Valley Chamber of Commerce, utilising their existing procurement channels and supply chain links to identify potential local suppliers, post consent.
Share information on potential local suppliers with Tier 1 contractors to support local subcontracting.
Drive collaboration with other developers to support a minimum of one supplier engagement activity, such as a “meet the buyer” event, on a group basis.
Apply progressive procurement practices, including early communication of requirements, to support SME participation.
Publish statistics on local content.

Source: BiGGAR Economics

7. Skills Development

Skills development initiatives are a key enabler of supply chain capabilities, increasing the economic benefits of the Proposed Development.

7.1 Maximising Benefits through Skills Development

Developing skills within the local region plays a pivotal role in maximising the economic benefits of wind farm projects. By investing in local workforce development and building relations with education and training providers the Applicant can help ensure that the community directly benefits from the jobs and opportunities created by the project.

Skills development can enhance the **capacity of the local workforce** to meet the technical demands of the renewables sector. Offering training and upskilling opportunities can help prepare local workers to take on both short-term construction roles and long-term operational positions, contributing to sustained employment.



Human Capital

Skills development is one of the key methods by which communities can build up human capital. Human capital includes the skills, knowledge and health/wellbeing that people accumulate throughout their lives. One of the ways in which this can be measured is through the total potential lifetime earnings of a community. A workforce with more skills is likely to earn more in the future.

In addition to greater potential lifetime earnings, a more skilled community has a greater level of economic resilience. Therefore, anything that can be done by the Applicant to develop skills will contribute to the long-term prosperity of the local area.

Building regional skills helps create a supply chain network, where local businesses can provide goods and services directly to the Proposed Development. This capacity-building in the local business community supports the growth of small and medium-sized enterprises, encouraging economic diversification and strengthening areas of expertise and delivery locally.



Through initiatives that target specific skills gaps and industry requirements, the Applicant can maximise the immediate economic benefits of the Proposed Development but also participate in and contribute to a workforce that can be competitive in future renewable energy projects. This creates a foundation for the region's long-term economic vitality, ensuring local communities remain integral to the sector as it develops.

7.2 Assessment Approach for Skills Development

To help ensure the benefits from renewable energy projects are maximised through skills development, guidance from Scottish Renewables suggests developers should:

- **Understand the local labour market** and its capacity to provide the skills needed in the short and longer term, and identify important skills gaps;
- **Build relationships with education and training providers** and work with them to implement the national skills strategy;
- Work collaboratively with relevant training/education partners and community bodies to **develop bespoke labour market development solutions**, including apprenticeships where appropriate; and
- **Adhere to progressive employment and recruitment practices** that meet or exceed current industry best practices.

The rest of this section considers the implications of this for this project.

The Applicant recognises that skills and workforce development play an important role in supporting participation in the onshore wind supply chain and in maximising the socio-economic benefits associated with the Proposed Development. While the scale of the Proposed Development means that direct employment opportunities will be limited, particularly at the developer level, the Applicant acknowledges that the Proposed Development can support skills development indirectly through its contractors and through collaborative engagement with regional stakeholders in other capacity.

7.2.1 Fair and High-Quality Employment

The Applicant is committed to promoting the creation of fair, inclusive, and high-quality employment opportunities associated with the Proposed Development. At a corporate level, this includes adherence to progressive employment and recruitment practices, for which the developer has an Equality and Inclusion Policy committing to gender equality, representation and equal opportunities reported on in ESG and annual reports.

“We recognise that a diverse and inclusive workforce is a key business driver. A team that reflects varied perspectives and experiences is

more effective, creative, and productive, which is particularly valuable in a global company like Eurowind Energy.”

Source: Eurowind Energy (2024), Sustainability Report

The Applicant commits to actively pursuing formal Real Living Wage accreditation. This will officially rubber-stamp the developer’s corporate standard, ensuring all directly employed staff and required on-site contractors are paid fairly.

7.2.2 Joint Educational Outreach

Capitalising on its proactive outreach to other local developers, the Applicant will propose a joint, coordinated approach to engage with Balfron High School, the primary secondary education provider serving the local catchment area.

Raising industry awareness among young people regarding the diverse career entry points into the renewable energy sector, ranging from civil engineering and site logistics to project management, directly expands local human capital and enhances regional economic resilience.

Collaborating with neighbouring developers and regional partners to support a synchronised career pathways day ensures high-quality student engagement while efficiently sharing the time and resource burden across multiple developers. By pooling regional resources, this collaborative framework presents a feasible and deliverable initiative.

7.2.3 Training and Partnerships

Building on their established, successful training collaboration with the Highlands and Islands College in Stornoway, the Applicant will explore post-consent engagement with Forth Valley College. This engagement will focus on aligning local college training provisions with the practical technical skills required during the construction and operations phases of onshore wind farms and the renewables sector.

Evidence of the Applicant’s commitment to regional skills alignment is demonstrated by its successful post-consent partnership with the Highlands and Islands College in Stornoway.

The Applicant uses this established Scottish track record to present credibility for this project. Post-consent, the Applicant intends to turn this collaborative experience into a practical, scaled partnership with local providers like Forth Valley College, ensuring benefits are proportionally matched to the Proposed Development’s feasibility and regional capacity.

7.2.4 Encouraging Tier 1 Contractors to Support Skills Development

Major contractors often utilise their own existing workforces, which makes forced local training rules difficult to enforce on a smaller site. The Applicant will task its primary contractors with engaging local suppliers to widen the business pool. This ensures that the construction phase directly contributes to long-term human capital and skills development in the surrounding area.

7.3 Commitments and Monitoring for Skills Development

As part of the next phase of this project, it will be important that the Applicant considers what steps it may take and any future actions it may be able to commit to in relation to skills development. Once these actions have been identified, it will also be important to consider how intended outcomes will be monitored and reported on.

Table 7-1 The Applicant Skills Development Commitments and Monitoring Proposal

Commitment
Commit to fair and inclusive employment policies at a corporate level, with the process for Living Wage accreditation already underway.
Where appropriate, engage collaboratively with local education providers and other renewable developers to raise awareness of opportunities in the sector and organise a career pathway day for students.
Encourage Tier 1 contractors to support apprenticeships, training, and upskilling opportunities.

Source: BIGGAR Economics.

8. Community Empowerment

This section outlines the measures proposed to support community empowerment and ensure community benefits are shaped by local priorities.

8.1 Potential Community Empowerment Benefits

It is good practice for wind farm developers to aim to provide community benefits worth at least £5,000/MW, however over the last 20 years, as experience of delivering projects and understanding of community priorities has grown, a plethora of mechanisms for delivering community benefit have evolved. These include:

- Provisions for shared equity arrangements with host communities;
- Support for housing and social infrastructure in host communities;
- Funding to support operational and/or staff costs of community anchor organisations;
- Financial support for specific local roles (e.g. nature wardens or rangers);
- Financial support for local people to undertake professional training and development;
- Local electricity discounts and other direct financial benefits for residents; and
- The provision of recreational infrastructure (paths and tracks) during the construction phase.

It is important all relevant mechanisms are considered as part of this assessment.

It is also important to differentiate between the *value* of funding a developer may provide and the *benefit* that funding may generate for the community. Community benefit packages that are designed to address the needs and aspirations of host communities and delivered in a way that puts communities at the heart of decision making are likely to generate greater benefits than those that are not.

8.2 Maximising Community Empowerment Impacts

To ensure the community empowerment benefits from renewable energy projects are maximised, guidance from Scottish Renewables suggests developers should:

- Work with local communities to **understand local needs, aspirations, appetite and delivery capacity**;
- Develop a **community benefit package tailored to local needs** that is consistent with best practice principles and (where feasible) a proposition for community ownership;

- Work closely with local communities to **build trusted relationships** to help support the emergence of innovative ideas and approaches, for example by appointing a single point of contact to manage discussions;
- Work with community bodies to **establish effective governance**, administration, monitoring and evaluation arrangements consistent with best practice and providing data to enable the national community benefit register to be regularly updated; and
- Engage with regional partners in the public and third sectors to identify and develop opportunities to **generate regional benefits**; and
- Setting out any steps taken to **collaborate with other developers** working on nearby projects to secure greater impacts from community benefit proposals, for example by linking up access tracks to create a local network of paths or setting up joint governance arrangements for community benefit funds.

The rest of this section considers the implications of this for this project.

8.2.1 Community Benefit Fund

The Applicant is committed to establishing a community benefit fund of £5,000 per installed MW of generating capacity aligning with evolving Scottish Government and official best-practice guidance. This fund will support projects and initiatives that reflect local priorities and create lasting value for communities near the Proposed Development.

To ensure this fund is consistent with the objective of maximising socio-economic benefits, it will be important to set out how the benefits from this fund will be maximised. This should include establishing **transparent, community-led governance arrangements**. To ensure the fund is empowering, it is important the Applicant works with local stakeholders to develop governance arrangements that place decision-making in the hands of the community. Post consent the Applicant will work with local stakeholders and communities to establish an appropriate mechanism for managing and administering the community benefit funds, utilising the highly active, well-established and uniquely capable development trusts in the Fintry and the Carron Valley areas and enabling structures which will put decision-making power into the hands of the community.

Through previous projects, Eurowind Energy has worked with local communities to identify priorities and shape community benefit approaches that respond to local needs.

8.2.2 Shared Ownership

The Applicant has previous experience on Uisenis Wind Farm, a project on the Isle of Lewis, where community benefit funding has been accompanied by opportunities for enhanced community involvement for up to 20%.

Recognising local interest, The Applicant will extend an offer of up to 20% shared ownership to the local community. To ensure deliverability, this will be proposed as a flexible framework where the final percentage is determined by the community's capacity and interest.

While the shared ownership objective in the onshore wind sector deal is not appropriate for all projects, the Applicant is committed to exploring the feasibility of shared ownership on all its projects.

8.3 Commitments and Monitoring for Community Empowerment

As part of the next phase of this project, it will be important the Applicant considers what steps it may take and any future actions it may be able to commit to in relation to community empowerment. Once these actions have been identified, it will also be important to consider how intended outcomes will be monitored and reported on.

Table 8-1 The Applicant Community Empowerment Commitments and Monitoring

Commitment
Establish a community benefit fund aligning with evolving Scottish Government and official best-practice guidance.
Work with the community to inform the package of community benefits to address local priorities and aspirations.
Develop proposals for a community ownership offer to present to the local community.

Source: BiGGAR Economics



9. Environmental Protection and Enhancement

Environmental protection ensures sustainable, community-driven renewable energy that maximises economic benefits.

9.1 Potential Environmental Benefits

Wind farm developers are expected to comply with a number of policies designed to ensure any adverse effect projects could have on the natural environment are effectively mitigated. However, it is sometimes possible for activity undertaken to achieve this to be delivered in a way that creates additional benefits for local communities. For example, rerouting access tracks can help ensure access to a site is maintained during a project but if this is done in a way that will improve access or enhance the experience of users this can create additional spillover benefits that should be considered as part of the socio-economic impact assessment.

9.2 Maximising Environmental Impacts

For the Proposed Development, opportunities to deliver additional environmental and recreational benefits are considered in the context of the scale of the Proposed Development, the characteristics of the site and the availability of existing facilities in the surrounding area.

The Proposed Development is a small-scale wind farm, and as such, the scope for delivering extensive on-site recreational infrastructure or public access enhancements is limited.

The Applicant's approach to environmental benefit focuses on ensuring that the Proposed Development is designed and delivered in a manner that protects existing environmental assets which includes sensitive site design, implementation of appropriate mitigation measures, and adherence to good practice during construction, operation, and decommissioning.

9.2.1 Native Species Habitat Enhancement

In line with the Applicant's corporate Sustainability Policy, the project aims to protect biodiversity across all developments and, where possible, achieve a net-positive impact on the local environment. The Applicant will deliver on-site environmental protection through the implementation of a comprehensive Habitat Management Plan (HMP). The current and future land use of the Proposed Development Site is commercial forestry. The Proposed Development operates primarily as a commercial



forestry site. Introducing additional native broadleaf species into this landscape introduces native ecological diversity, which improves local soil health, creates more resilient ecosystems, and creates new / improved habitats for local wildlife. This HMP will focus on integrating native broadleaf species to enhance the existing commercial forestry site, as well as other enhancements such as providing artificial osprey nest platforms, and the creation of pond habitats onsite.

The HMP also provides a structural framework to actively deliver and monitor the project's long-term biodiversity net-gain commitments. This ensures that the environmental enhancements are scientifically tracked and successfully established over the wind farm's operational life.

9.2.2 Preservation of Recreational Access

Public feedback and site observations indicate that Cairnoch Hill serves as a secondary, more niche recreational destination compared to the highly established trails and abundance of parking located immediately to the south of the Carron Valley Reservoir. Because facilities are already excellent nearby, there has been no demand from the community for new parking or public facilities at the site.

However, the Applicant recognises that cycling, running, and horse riding are still recreational activities present in and around the Proposed Development and the Applicant commits to maintaining open public access post-construction, where compatible with health, safety and operational requirements.

9.2.3 Policy Alignment with Forestry and Land Scotland (FLS)

FLS face ongoing challenges on their lands regarding littering and illegal fly-tipping. In accordance with FLS management preferences and to avoid encouraging anti-social behaviour, the Applicant will not introduce any new public parking infrastructure or enhancements on the site.

The main southern entrance to the site (just north of the reservoir) currently features a locked FLS gate where visitors occasionally park cars onto the side. The Applicant will expand this entrance solely to accommodate the swept path of turbine delivery vehicles. In line with FLS policy, this modification will be kept strictly functional for operational requirements rather than being promoted as a formal public parking upgrade.

9.3 Commitments and Monitoring for Environmental Protection and Enhancement

As part of the next phase of this project, it will be important the Applicant considers what steps it may take and any future actions it may be able to commit to in relation to the local environment. Once these actions have been identified, it will also be important to consider how intended outcomes will be monitored and reported on.

Table 9-1 The Applicant Environmental Commitments and Monitoring

Commitment
Consider proportionate opportunities for environmental enhancement where these are compatible with site conditions and project scale including those outlined in the Habitat Management Plan.
Where appropriate for health and safety, maintain open public access post-construction for recreational access to the site.
Align policies with Forestry Land Scotland to work collaboratively and alleviate challenges.
Deliver and monitor commitment on net positive impact on biodiversity.

Source: BiGGAR Economics

10.

Economic Impact

This section estimates the economic impact that could be generated from the Proposed Development.

10.1.1 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 practices and was used in a study undertaken in 2015 by BIGGAR Economics on behalf of RenewableUK¹⁴.

10.1.2 Sources of Economic impact

Impacts have been measured across two different project stages: development and capital expenditure, and operational expenditure (over the lifetime of a development assumed to be 40 years).

There are three significant types of economic impact associated with the wind farms:

- 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.

Similarly, if the wind farm procured the services of an equipment rental company the operator would be included in the jobs impact. A proportion of the mechanics job, who was paid to maintain the equipment would also be included in this model.

10.1.3 Measures of Economic Impact

Economic impacts are reported with respect to the following measures:

- Gross Value Added (GVA): a commonly used measure of economic output, which 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 Proposed Development. As an example, a job that lasts for 18 months would support 1.5 years of employment.

¹⁴ RenewableUK (2015), Onshore Wind: Economic Impacts in 2014.

10.1.4 Study Areas

Economic impacts are reported inclusively and were estimated with respect to the following study areas:

- Stirling; and
- Scotland.

10.2 Development and Construction

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

The Proposed Development is expected to have 4 turbines with a total generating capacity of up to 30 MW. It was estimated that the total development and construction expenditure would be £47.2 million. The expenditure was split according to the following component contracts:

- Development and planning;
- Turbine;
- Balance of plant; and
- Grid connection.

The greatest expenditure component was associated with turbines, equivalent to £30.3 million, or 64% of total development and construction spend. The following largest expenditure was associated with the balance of plants, amounting to £12.0 million (25% of total expenditure). It was estimated that development and planning would account for 5% of spending, and that grid connection would also account for 5% of total expenditure.

Table 10-1 Development and Construction by Contract Type

	% CAPEX	Value (£m)
Development and Planning	5%	2.4
Turbines	64%	30.3
Balance of Plant	25%	12.0
Grid Connection	5%	2.5
Total	100%	47.2

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

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

Based on the evidence from similar developments within Stirling, it was estimated that approximately 37% of the Proposed Development's contracts will be carried out by Scottish businesses, with a value of £17.6 million. It was estimated that spending on businesses based in Stirling would be approximately £3.9 million equivalent to 8% of total development and construction expenditure.

The greatest opportunity for Scottish businesses is expected to be in contracts associated with the balance of plant, which would be worth up to £11.0 million. The value of balance of plant contracts are likely to be the largest opportunity for businesses in Stirling worth up to £2.0 million.

Table 10-2 Development and Construction Expenditure by Study Area

	Stirling		Scotland	
	%	£m	%	£m
Development and Planning	34%	0.8	75%	1.8
Turbines	3%	0.8	10%	2.9
Balance of Plant	16%	2.0	91%	11.0
Grid Connection	10%	0.2	77%	1.9
Total	8%	3.9	37%	17.6

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

Having estimated the size of the contracts that could benefit each of the study areas, it was possible to estimate the GVA and short-term employment that these are likely to support. This was done by splitting each contract category into its component contracts and assigning each to an industrial sector, based on its Standard Industrial

Classification (SIC)¹⁵ code. Direct GVA was then estimated by applying the relevant turnover per GVA ratio from the UK Annual Business Survey (ABS)¹⁶.

It was estimated that the development and construction of the Proposed Development would generate £1.8 million direct GVA in Stirling and £7.8 million direct GVA in Scotland.

Table 10-3 Development and Construction, Direct GVA by Study Area (£m)

	Stirling	Scotland
Development and Planning	0.4	1.0
Turbines	0.4	1.4
Balance of Plant	0.8	4.6
Grid Connection	0.1	0.7
Total	1.8	7.8

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

The number of direct jobs supported development and construction contracts was also estimated by dividing the expenditure in each contract by the turnover per job ratio for the relevant sector. It was estimated that the development and construction of the Proposed Development would generate 90 direct years of employment in Scotland including 22 years of employment in Stirling.

Table 10-4 Development and Construction, Direct Employment by Study Area (Years of Employment)

	Stirling	Scotland
Development and Planning	4	10
Turbines	8	23
Balance of Plant	9	48
Grid Connection	1	9
Total	22	90

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

Expenditure in development and construction contracts is also expected to generate 'knock-on' effects across the economy. Specifically, it will be associated with further rounds of expenditure along the supply chain and with the spending of the wages

¹⁵ Office for National Statistics (2009), Standard Industrial Classification of industrial Activities (SIC 2007).

¹⁶ Office for National Statistics (2020), Annual Business Survey 2018 - Revised.

and salaries of those involved in the development and construction of the Proposed Development. These are referred to as 'indirect' and 'induced' impacts.

To estimate indirect and induced impacts, it was necessary to apply the relevant Type 1 and Type 2 GVA and employment multipliers from the Scottish Government Input-Output Tables¹⁷ to direct GVA and direct employment. Since the multipliers refer to sectoral interactions occurring at the level of the Scottish economy, it was necessary to adjust them when considering impacts taking place in Stirling.

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

- £2.4 million GVA and 28 years of employment in Stirling; and
- £13.7 million GVA and 151 years of employment in Scotland.

Table 10-5 Economic Impact of Development and Construction Spending (£m)

	Stirling	Scotland
Direct GVA	1.8	7.8
Indirect GVA	0.3	3.6
Induced GVA	0.4	2.3
Total GVA	2.4	13.7

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

Table 10-6 Economic Impact of Development and Construction Spending (Years of Employment)

	Stirling	Scotland
Direct Employment	22	90
Indirect Employment	3	41
Induced Employment	3	20
Total Employment	28	151

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

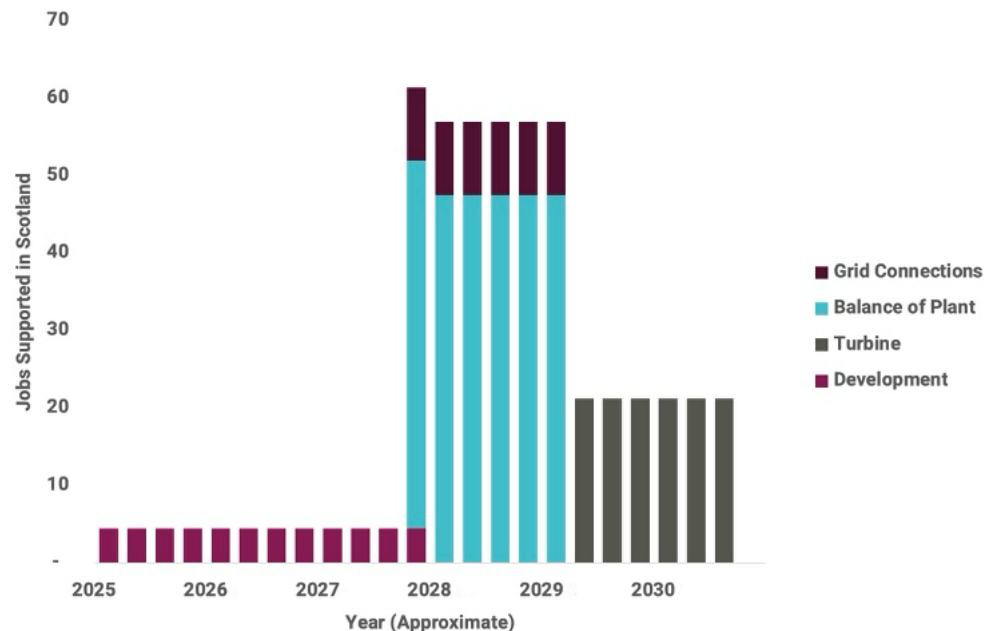
The estimated figures show that the Proposed Development would contribute to the provision of high-quality local employment opportunities during the development and construction phase and help maximise the value of local expenditure. These are in line with the requirements of the NPF4 Policy 11(c).

The employment impacts in Scotland will peak during the construction phase, in particular, during the initial balance of plant works. It is estimated that during this

¹⁷Scottish Government (2023), Supply, Use and Input-Output Tables.

phase up to 61 jobs will be supported across the Scottish economy. An indicative employment profile for Scotland is shown in Figure 10-1.

Figure 10-1 Employment in Scotland over time (Direct and Indirect impacts)



Source: BiGGAR Economics Analysis

10.3 Operation and Maintenance

The initial stage in determining the economic impact stemming from the operations and maintenance of the Proposed Development involved assessing the annual total expenditure necessary for its operation. Based on the number of turbines and the Proposed Development's capacity, it was estimated that the annual cost of operations and maintenance (OPEX) is likely to amount to approximately £1.5 million.

It was further assumed that businesses in Stirling could benefit from a total £0.6 million in operations and maintenance contracts (43% of OPEX) annually, and that annual expenditure in Scottish contractors could be up to £1.3 million (88% of OPEX).

Table 10-7 Operations and Maintenance

	Stirling		Scotland	
	%	£m	%	£m
O&M - Wind Element	43%	0.6	88%	1.3

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

The total turnover generated in each study area was then divided by the turnover per GVA and turnover per job ratios of the sectors expected to carry out operations and maintenance contracts. In this way, it was estimated that the Proposed Development is likely to generate £0.3 million direct GVA and 1 direct job in Stirling, and £0.6 million direct GVA and 4 direct jobs across Scotland.

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

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

- £0.5 million GVA and 2 jobs in Stirling; and
- £1.2 million GVA and 7 jobs in Scotland.

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

10.4 Non-Domestic Rates

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

To estimate the economic impact generated by non-domestic rates, guidance developed by the Scottish Assessors Association (SAA)¹⁸ was followed. To calculate the Net Annual Value (NAV) of the site, expected average income per MWh¹⁹ was multiplied by the expected annual net yield of the project (calculated by multiplying the capacity by an assumed capacity factor of 35%²⁰ and the hours in a year), and the Appropriate Percentage of 4% as outlined in the SAA guidance. To estimate the NAV of the equipment and infrastructure, the capacity of the project was multiplied by the average cost of equipment for onshore wind²¹ and the decapitalisation rate of 4.6%.²²

¹⁸ Scottish Assessors Association (2023). Practice Note 2: Valuation of Onshore Wind Turbines

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

²⁰ Opoura (2025), What is the capacity factor of a wind turbine?

²¹ Woodman (2025), Onshore wind: diverging cost trends, converging turbine maker strategies

²² Scottish Government (2025), Decapitalisation rate for the 2026 Revaluation – Final Business and Regulatory Impact Assessment

Summing together the NAVs of the site and equipment resulted in a total rateable value of around £671,400. The relevant poundage rate of 0.568²³ was then applied.

Using this approach, it was estimated that over its operational period, the Proposed Development is expected to make an annual contribution of approximately £0.4 million to public finances. Across its 40-year operational lifespan, this contribution towards non-domestic rates is anticipated to accumulate to around £15.3 million.

²³ Scottish Government (2025), how your rateable value and rates are calculated

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

info@biggareconomics.co.uk

biggareconomics.co.uk

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