



From mountain to sea

Community Impact Assessment – COVID-19

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ABERDEENSHIRE OVERVIEW

Contextual Summary

Employment

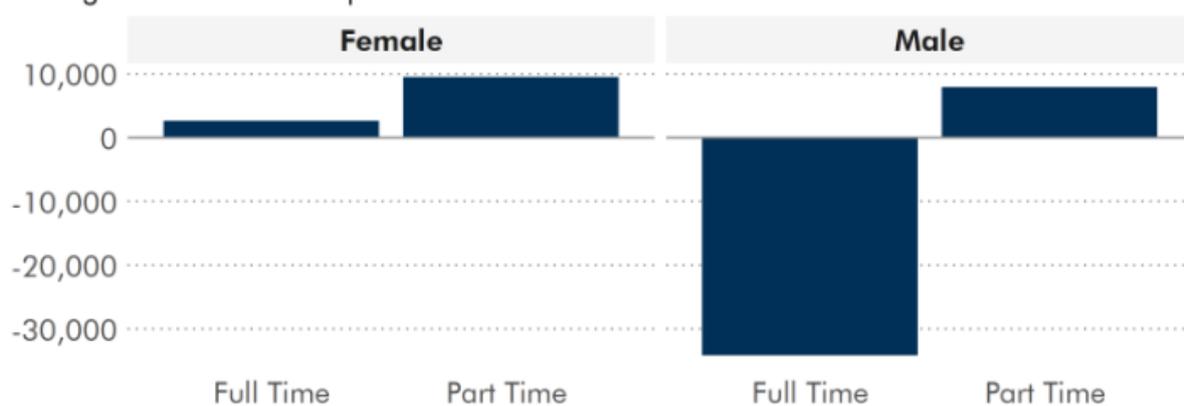
Workforce data from the Office of National Statistics (ONS) reported that the number of jobs in **Scotland** fell by 14,000 between March and June 2020. Analysis by SPICe at a national level shows that there is an underlying story to the jobs market. There has been an increase in part-time jobs, however.

Figure 1 below shows the change in the number of jobs in Scotland over the relevant period.

Figure 1 – Change in the number of jobs in Scotland between March and June 2020

There was a large decrease in male full time jobs

Change in the number of jobs in Scotland between March and June 2020



Source: ONS

- Where full-time jobs have been added they are in lower paid industries or for the self-employed.
- Males appear from these statistics to have been harder hit than females.
- With the end of the furlough scheme scheduled for the end of October, this fall in jobs may be much higher in the coming months.

It would be entirely plausible that the same findings would be replicated in areas of Aberdeenshire.

Digital Exclusion/Vulnerability

During COVID-19 pandemic many organisations and partners found that there was a need for a rapid shift to signposting and online delivery of support. This will have posed challenges for the more deprived and vulnerable groups who are digitally excluded and would not have access to a smart phone or a computer. Digital would not be the first-choice communication method of many vulnerable groups who tend to opt for face to face advice however during the pandemic this was not an option that was available during the pandemic and high-demand periods. Digitally vulnerable areas are likely to contain relatively high rates

of child poverty, pensioner poverty, single person households and households without access to a van or a car. They are also likely to contain a relatively high proportion of the population in receipt of Personal Independence Payments suggesting that the recipients may be more at risk from COVID-19 and require additional support or assistance.

Mental Health

Back in April 2020 the First Minister said that Scotland will be left with a “mental health legacy” from COVID-19 long after social distancing restrictions are lifted.

A recent study by the Office of National Statistics in relation to Coronavirus and depression in adults (June 2020) looked at the proportion of the population with depressive symptoms in Great Britain between 4 and 14 June 2020, based on the Opinions and Lifestyle Survey (a nationally representative survey of adults in Great Britain) including how symptoms of depression have changed since before the pandemic (July 2019 to March 2020). Main findings include:

- Almost one in five adults (19.2%) were likely to be experiencing some form of depression during the coronavirus (COVID-19) pandemic in June 2020; (9.7% pre-pandemic)
- One in eight adults (12.9%) developed moderate to severe depressive symptoms during the pandemic, while a further 6.2% of the population continued to experience this level of depressive symptoms; around 1 in 25 adults (3.5%) saw an improvement over this period.
- Adults 16 to 39 years old, female, unable to afford an unexpected expense, or disabled were the most likely to experience some form of depression during the pandemic.
- Feeling stressed or anxious was the most common way adults experiencing some form of depression felt their well-being was being affected, with 84.9% stating this.
- Over two in five (42.2%) adults experiencing some form of depression during the pandemic said their relationships were being affected, compared with one in five (20.7%) adults with no or mild depressive symptoms.

In the Council’s recent CIA survey, the residents gave views on both the positive and negative aspects of the coronavirus pandemic including some people being more active; making positive changes to their lifestyle etcetera, however they are concerned that there are gaps in the support available for certain groups e.g. single parents and young people. A substantial number of people are concerned about the impact of the pandemic on other people’s mental health and are concerned about access to health care services and the impact of the last few months on long term health. In Aberdeenshire there is also anecdotal information locally about increased concern for young men – 16-24yrs old.

Feeling Safe

For the economy to recover, people need to feel safe to resume/reengage in their normal activities. These can be going to work, travelling on public transport, visiting a hairdresser/barber or other business that provides close contact service. In the CIA survey residents report that they are concerned about their jobs, education for others and safety in their community with almost one third of respondents saying that they feel less safe on their local areas, less likely to visit public places.

Impact on Inequalities

A key feature of the crisis is how it is impacting differently on different groups. The higher rate of health impact on Black and Minority Ethnic populations have been widely documented¹; these differences are also stark across different socio-economic groups.

For example, COVID-19 job disruption is likely to have a disproportionate impact on women's employment, as a result of low-paid women being particularly affected by job disruption; and women are potentially faced with an increase in childcare responsibilities as a result of school and nursery closures in the shorter term.

The Institute for Public Policy Research² notes that young people are also likely to be hit hard in Scotland, as they are disproportionately concentrated in the sectors most affected by the economic shutdown, and so face heightened exposure to job loss or furlough.

The IPPR estimates that 41% of young people in work in Scotland were furloughed in April, compared to 22% of all workers in Scotland. This is similar to research from the IFS³ that has found that workers under the age of 25 are two and half times more likely than those aged 25 and older to work in sectors that have been shut down and is reinforced by work from the Resolution Foundation for the Nuffield Foundation that estimates that youth unemployment could rise by 600,000 across the UK, affecting the least qualified the most.

Impact on Oil & Gas⁴

The oil & gas sector has recovered and reinvented itself through innovation. But as the extent of damage wrought by COVID-19 becomes apparent, the situation appears different this time.

What makes this crisis unique is not just the combination of the immediate demand and early supply shocks, resulting in extreme volatility. It is also how the crisis may accelerate underlying trends, such as the growing momentum of environmental, social and governance (ESG) themes, and energy transition.

The spread of COVID-19, resulting in global lockdowns and dramatically reduced economic activity, has led to a tumble in demand for oil. This demand shock, according to analysts, represented a 30% decline in April 2020 alone¹. Several agencies now anticipate that for the whole of 2020, oil demand will decline by about 7 to 9 million barrels per day. During the global financial crisis, demand decreased by 1.4 million barrels per day.

Many office staff are working from home, while the numbers working on offshore platforms have been cut to allow for social distancing. North Sea staffing levels are down 40% to 7,000 according to trade association Oil & Gas UK, while in the face of reduced demand, refiners are scaling back processing runs or even shutting down refineries altogether.

The energy transition and a move to ESG investing have been underway for some time, but COVID-19 may provide the impetus to accelerate these trends. As mentioned earlier, one of the main themes of the latest Programme for Government centres on tackling climate change and decarbonisation.

¹ A historic drop occurred on 20 April 2020, when the price of West Texas Intermediate crude dropped by 300%, trading at around **negative** \$37 per barrel (futures contract). This was a consequence of the demand shock as a result of the COVID-19 lockdown and the oil price war between Russia and Saudi Arabia.

The COVID-19 crisis has highlighted how fragmented the energy market remains, and this is particularly true in oil services. Whether as a result of distress or outright failure, consolidation in the market is a likely outcome.

Global upstream Oil Field Services (OFS) revenue never recovered from the last oil price downturn but invested capital levels have remained elevated, further reinforcing the need for capacity rationalisation.

There will likely be mergers, with Tier 2 and 3 (smaller) companies looking to combine to survive. Tier 1 (larger) players may continue to divest but may also become aggregators, acquiring smaller companies to build specific capabilities.

Job losses tend to follow industry consolidations

Across all these segments OFS companies will likely develop strategies to increase their exposure to low carbon plays, such as offshore wind, hydrogen and carbon capture, utilisation and storage (CCUS).

Alternatively, OFS players may consider strategic investments in selective geographies and product or service lines which will prove resilient through cycles and generate cash flow in the future. They may also streamline their portfolio. Many larger OFS companies have subscale businesses in sub-scale geographies. These tend to destroy the economic value. Therefore, divestitures are in order and may result in the emergence of larger regional OFS companies.

In 2016 the Wall Street Journal estimated that the cost of producing a barrel of oil in the UK equated to \$44 – the highest out of the world's top oil-producing nations⁵. At the time of writing, oil prices barely cover the average cost of extraction. Additional expenses, like taxes on profits, mean that the actual breakeven price for many projects is higher, and newer and more complex projects generally fall well above the average cash cost of production. The danger for the North East economy is that oil & gas extraction will no longer be considered a viable cash-generating activity for some businesses.

Fishing

Aberdeenshire is home to two of Europe's biggest fishing ports – Fraserburgh and Peterhead but there are also many smaller businesses focusing on shellfish operating along the North east coastline. Coronavirus started to have an impact on the fishing industry right from the start. In March the total quantity of reported landings by the UK fleet was 61 thousand tonnes, 15 per cent lower than the same week in 2019. In Peterhead less than 50% of the volume for the same week in 2019 was landed. Around 80% of shellfish and seafood is destined for international markets so the closure of export markets to Europe and Asia meant that the price of fish dropped. This was followed by the closure of restaurants, canteens, and fresh fish counters in supermarkets in the UK which had a huge impact on fish sales.

Landings have continued but at a much reduced capacity to supply the domestic market. In July there was some opening up of markets however local lockdowns and spikes across Europe have led to reduced tourist numbers – leading to less demand for Scottish seafood in restaurants abroad.

Seafood processors provide many jobs and support others in the north-east of Aberdeenshire, but COVID-19 meant that many were furloughed. According to a recent Seafish report, it is estimated that one employee in the pelagic catching sector supports 5.6

jobs in the wider UK economy and one employee in the pelagic processing sector supports 5.9 jobs in the wider UK economy.

A financial assistance scheme of £10 million was provided by the Scottish Government in April to aid seafood processors through the economic pressures related to COVID-19 to help them meet their ongoing costs, keep the business solvent, and keep people on the payroll. It is not clear whether the sector will experience a quick or a slow recovery once COVID-19 pandemic is over. Financial support has also been made available for the shellfish sector. Some smaller businesses have benefited for example by selling direct to the customer however domestic markets have limits in terms of demand and price.

In the short term, possible disruptions to economies and livelihoods could come from labour shortages (travel barriers, labour lay-offs, etc.), direct boat-to-consumer sales; aquaculture input shortages (feed, seed, vaccines); as well as fishing (e.g. bait, ice, gear, etc.) and a lack of finance and cash flow (delayed payment of past orders). More online services and improved product traceability and sustainability are some of the results likely to emerge from the crisis.

A major survey by the Seafish organisation is underway to find out the financial and socioeconomic impact of Covid-19 on the seafood processing industry in the UK and to put together a profile of the sector. This will be used by the industry to highlight the challenges it faces.

Brexit

The role that Brexit will play in the social and economic future of Aberdeenshire is by no means clear. Myriad rights and laws have been created by EU membership over the 40 years the UK has been a member. Over the longer term (15+ years), many economists have predicted that the decision to leave the EU will damage trade, labour mobility, and investment.

The transition period is scheduled to end on 31 December 2020. New economic modelling by the Scottish Government indicates that ending the transition this year would result in lowered Scottish GDP of between £1.1 billion and £1.8 billion by 2022 (0.7 to 1.1% of GDP), compared with ending transition at the end of 2022. That would be equivalent to a cumulative loss of economic activity of between nearly £2 billion and £3 billion over those two years. A proportionate impact would be likely for the UK economy. This will clearly hamper recovery from the impact of the pandemic⁶.

The combined impact of these effects on businesses that are already severely affected by COVID-19 could result in widespread business closures and job losses over and above those resulting from COVID-19 alone.

In early 2020, Citizens Advice Scotland (CAS) commissioned Ipsos MORI to undertake exploratory research on the impact of Brexit on individuals, businesses and communities across Scotland. The research consisted of qualitative research amongst EU nationals, UK nationals and Scottish based businesses across three different geographic case study areas: Glasgow, **Aberdeenshire**, and the Highlands. The findings in terms of the impact on the economy are:

- Participants reported that they had experienced an increased cost of living since the EU referendum in 2016. They raised concerns that Brexit may result in further increases in the cost of living, citing the likelihood of prices increasing after the UK has withdrawn from the customs union.

- Businesses reported that they had made operational changes to their business plans as a result of a decrease in job applications from EU nationals and anticipated changes to import and export regulations.
- Participants, particularly in the Highlands and Aberdeenshire, were concerned that Brexit may have a detrimental impact on their local economies and noted that the hospitality and tourist industries were a vital part of these local economies.

European Structural Funds:

The UK will not receive support from the European Structural Funds, after the current funding period. The purpose of these funds is to “invest in job creation and a sustainable and healthy European economy and environment.” In Scotland, they have played a vital role in reducing disparities across different parts of the country for over 40 years.

Under the current 2014-2020 programme Scotland benefits from over £780m of such funding through the European Regional Development Fund and the European Social Fund. This provides investment for key policies such as the Modern Apprenticeship schemes and Low Carbon Infrastructure Transition Programme. The loss of this funding will have a significant impact on the ability of local authorities, community groups, funding bodies and enterprise and skills agencies to deliver the kinds of initiatives that will drive inclusive economic growth and promote wellbeing and cohesion in communities across Scotland.

Aberdeenshire Council has previously carried out an evaluation of the delivery of European Structural Funds programmes in parallel with stakeholder consultation on potential national programmes⁷.

The report identifies the following priorities as particularly important for replacement domestic programmes:

- **Employability and Skills** - initiatives which support disadvantaged people into sustainable employment and/or ensure that there is a skilled workforce in place to meet the needs of the local economy.
- **Poverty** - initiatives which support people living in or at risk of living in poverty, with a particular focus on rural deprivation and pockets of deprivation in small towns.
- **Connectivity** - initiatives which improve digital and transport infrastructure in rural areas and/or increase accessibility to reliable, regular and sustainable transport.
- **Regeneration, Rural Services and Facilities** - initiatives which regenerate physical infrastructure in villages and towns and/or enhance local services.
- **Business Development and the Social Economy** - initiatives which directly support businesses, including social enterprises, to grow, innovate or export and initiatives which support the development of priority sectors with a particular focus on diversification and strengthening of traditional sectors and the development of emerging sectors and economic opportunities.

Aberdeenshire Council would like to see the above priorities taken into consideration in the development of new domestic programmes. In light of the declared climate emergency in 2019 by the Scottish Government, Aberdeenshire Council additionally would like to see climate action (mitigation and adaptation) and biodiversity made a priority also.

These priorities may be interlinked (e.g. tackling in work-poverty through employability interventions) and should not necessarily be limited in scope to the activities supported by current Structural Funds programmes. For example, there is an opportunity to expand eligible activity to include investment in town centre redevelopment and repurposing. There

should also be a continuation of horizontal, cross-cutting themes including environmental sustainability and social inclusion integrated into all parts/themes of the programme⁸.

Migration: Brexit has placed an increased focus on the nationality of people living and working in the UK. It has the potential to discourage EU migrants from coming to the UK to live and work, either through choice or eligibility. Migration is important to Scotland as without it the population would be declining. In Aberdeen City and Shire, there were 35,000 people who were born in the EU and a further 26,000 from the rest of the world in 2018. The EU born population accounted for 7% of the region's population, and 5% of the region's population were born elsewhere in the world. Compared to Scotland a greater percentage of the region's population were born in the EU or elsewhere in the world.

Changes to migration policy as a result of Brexit will affect all regions in Scotland, but the evidence suggests that Aberdeen City and Shire may be more adversely affected if the changes affect supply. Aberdeenshire could be impacted by a reduction in employees in the care sector – there is already anecdotal evidence that this is happening.

Community Impacts - Other Contextual Evidence

Transport Operators and Social Distancing

Given the limited rail service coverage in Aberdeenshire, local bus services provide crucial lifeline services to communities across Aberdeenshire providing the only or most effective means of access for many to employment, health care, education/training, shopping and other facilities. The Transport Scotland Covid-19 Support Grant to bus operators in order to reinstate local bus networks has been welcomed and permitted around 95% of the pre-COVID-19 Aberdeenshire bus network to be provided. Continuity of such funding in the medium term is crucial to maintenance of the Aberdeenshire local bus network, given that patronage and associated fares revenue remains (and is likely to continue to be) suppressed and social distancing rules continue to reduce the capacity of vehicles and therefore the costs of provision.

In line with Scottish Government and COSLA advice, Aberdeenshire Council maintained payments to transport operators throughout the Lockdown period when many passenger transport services were curtailed or suspended. Despite this, given the significant downturn in other aspects of their business due to Covid19, for example, private hires, many smaller operators will be struggling financially and without on-going support could cease to trade, significantly diminishing the number of potential suppliers of such services, with consequential implications to tender prices for supported local bus, school transport and other passenger transport services.

The proposed Public, School and Community Transport Covid19 Mitigation Fund, although belated, is also welcomed and should to a lesser extent assist some transport operators and transport authorities in addressing specific Covid19 related issues. This fund should be maintained for the duration of the period when social distancing rules apply to transport services

Agriculture

The Scottish Agricultural Organisation Society (SAOS) conducts a weekly co-op surveillance survey of its members and regularly reports to the Scottish Government on the impact of COVID on the sector and to highlight any issues raised. In general, co-op members are said to have coped remarkably well. The vast majority didn't furlough staff and adjusted their operations and continued to serve their farmer members. Those who had invested in IT

equipment / updates and cross-trained staff reportedly reaped the benefit. Most board meetings are now conducted online. The technology has worked well.

The SAOS believe **increased co-operation** is the best way to build resilience and supply chains. The challenges facing farming and wider rural communities are so great (COVID-19 recovery, leaving the EU, the climate emergency, skills gap, etc) the only solution is through people working together – **co-operation and supply chain collaboration**.

Co-operation brings farm businesses together to achieve greater efficiencies in areas such as purchasing, production and marketing. The benefits include greater profitability, and resilience for farmers, the knock-on advantages this gives to the wider farming sector, and the public benefits that follow from communities working together. It also addresses the imbalance in power farmers experience when dealing with multiple retailers and processors. Co-ops provide the thought leadership and have the resources to make change happen. Without a supportive policy to encourage increased co-operation change will be slow and mainstream family farms will suffer.

Recovering from COVID-19 – A Local Authority Perspective²

With the pandemic having closed much of the economy, more people are experiencing insecurity and hardship. As governments around the world, including the UK, start to ease the lockdown and get their economies moving again, it is becoming clear that life is going to be different, with many implications for local authorities.

Local government is at the heart of community wealth building, and there are many examples of the proactive and imaginative approach required in how councils have coordinated local emergency responses to the pandemic. The same level of energy and focus will be needed in the recovery and reform stages to build local economies based on wellbeing, resilience, environmental sustainability and economic justice.

According to the Local Government Information Unit, local authorities can play three roles in the economic response to COVID-19⁹:

- (1) Analyser** – building and maintaining a detailed and granular knowledge of the state of the local economy and the impact of COVID-19 in the short, medium and long term on sectors and communities.
- (2) Anchor** – as a large employer, procurer of goods and services, owner of land and assets and investor in the local areas, the council, with other anchor institutions, can lead economic reform.
- (3) Agent of change** – using all the levers of the local state, councils can set the conditions for inclusive local economies and rewire the local economic architecture; they can also intervene at scale to implement policies such as insourcing and new municipal enterprises.

Local authorities could undertake the following tasks or actions (amongst others):

- Map local needs and flows of goods and services.
- Work practically with local businesses as state support is withdrawn.
- Update local economic and industrial strategies for the new context.
- Ensure local industrial strategy can support potential growth sectors, for example, 'green new deal'.

² This is based on research by the Local Government Information Unit (LGIU). LGIU was established in 1983 as an independent, not-for-profit local authority membership organisation and think tank. Members include councils and other organisations with an interest in local government from across England, Wales, Scotland, Ireland and Australia. LGIU Scotland comprises 5,000 individual members, and includes MSPs, MPs, National Conveners, CEOs, NGOs, and local authorities.

- Scale-up unemployment support and tailor it to needs of the most vulnerable
- Dispose of under-used assets to 'public-commons partnerships' and socially-minded businesses.
- Help bring redundant private assets back into use for social purposes.
- Where relevant, identify where existing devolution deals may need further work with the government to meet newly arising need.
- Use procurement to raise social, economic and environmental standards and incentivise good pay conditions; explore how other powers such as planning and business rates could further support higher standards.
- Collaborate with other anchor institutions and their supply chains on employment support schemes to create opportunities for the most disadvantaged.
- Encourage new forms of finance and investment with steady returns, for example using municipal pension funds.
- Support the voluntary, community and social enterprise sector to develop new socially oriented businesses to meet needs.
- Consider how essential services such as broadband, public transport and housing could be made more universal.
- Lobby vigorously for a fair funding settlement for local government.

Aberdeenshire Statistical Summary

The main Ward report categorises vulnerability thematically, as per the list below:

- COVID Vulnerability (based on 2 major indices);
- Age Vulnerability (based on 2 indicators);
- Health Vulnerability (based on 28 indicators);
- Economic Vulnerability (based on 15 indicators); and
- Other Socio-Economic Vulnerability (based on 30 indicators).

Summaries of each of the themes listed above will be dealt with individually from an Aberdeenshire perspective.

COVID Vulnerability

The report utilises two major COVID vulnerability Indices which place Intermediate Zones on a spectrum relative their respective COVID vulnerability rankings. One of these studies was conducted by the Scottish Public Health Observatory (ScotPHO), the other by the British Red Cross (in association with Oxford University).

Both studies incorporate multiple indicators that capture clinical vulnerability (e.g. underlying health conditions), demographic vulnerability (e.g. over-70s), social vulnerability (e.g. barriers to housing and services, poor living environment, living in “left-behind” areas, loneliness, digital exclusion), and health inequalities.

According to the ScotPHO study, Aberdeenshire is among the least vulnerable areas in Scotland on a population weighted basis³. Of Aberdeenshire’s 59 Intermediate Zones, 8 were in the 20% most vulnerable in Scotland. This equates to 14% of Aberdeenshire’s Intermediate Zones - the 4th lowest proportion in Scotland.

Approximately 33,000 people live within these 8 Intermediate Zones, which equates to approximately 13% of Aberdeenshire’s total population. Again, this was the 4th lowest proportion in Scotland.

The British Red Cross (BRC) COVID Vulnerability Index takes account of more indicators and is arguably more comprehensive than the ScotPHO study.

According to the BRC study, there are zero Intermediate Zones in Aberdeenshire within the most vulnerable 20% in Scotland. The most vulnerable Intermediate Zone – Fraserburgh Harbour & Broadsea – falls just outside the most vulnerable 20%.

The overall vulnerability scores within the BRC study are closely correlated to a number of specific indicators. In more vulnerable areas, the items list below are likely to be relatively high.

- **The proportion of people who are out of work and receiving benefits relating to poor health: Incapacity Benefit (IB) / Employment Support Allowance (ESA).** IB and ESA are workless benefits payable to people who are out of work and have been assessed as being incapable of work due to illness or disability and who meet the appropriate contribution conditions. The overall scores are also correlated to the proportion of IB recipients whose claims are due to mental health related conditions.

³ <https://scotland.shinyapps.io/scotpho-covid-vulnerability/>

- **The proportion of people receiving benefits payable to people who are unemployed receiving either Jobseekers Allowance (JSA) or Universal Credit for those who are out of work.**
- **The proportion of residents with a limiting long-term illness.** Figures are taken from responses to the 2011 Census, based on a self-assessment whether or not a person has a limiting long-term illness, health problem or disability which limits their daily activities or the work they can do, including problems that are due to old age.
- **Pensioners in poverty.** This is defined as pensioners in receipt of Pension Credit. Pension Credit provides financial help for people aged 60 or over whose income is below a certain level set by the law.

Other moderately strong correlative indicators include:

- **The proportion of households who do not have a car or van.** Figures are based on responses to the 2011 Census car ownership question which asks information on the number of cars or vans owned, or available for use, by one or more members of a household. It includes company cars and vans available for private use. The count of cars or vans in an area is based on details for private households only.
- **the proportion of people who are disabled and receiving Disability Living Allowance (DLA).** DLA is payable to children and adults who become disabled before the age of 65, who need help with personal care or have walking difficulties because they are physically or mentally disabled. People can receive DLA whether they are in or out of work. It is non-means tested and is unaffected by income or savings of the claimant. DLA provides support for paying with additional care or mobility requirements associated with a disability.
- **The proportion of patients being prescribed anxiolytic, antipsychotic or antidepressant drugs.** This is derived from paid prescriptions data at patient level.
- **The proportion of working age people receiving Personal Independence Payment (PIP) whose main disabling condition is a respiratory disease.** Respiratory diseases include asthma, chronic obstructive pulmonary disease, bronchiectasis, cystic fibrosis, pulmonary fibrosis, pneumoconiosis, heart and lung transplants and various lung diseases and diseases of the upper and lower respiratory tract. PIP helps with some of the extra costs caused by long-term disability, ill-health or terminal ill-health.
- **The proportion of people receiving Universal Credit who are not expected to work at present.** Health or caring responsibility prevents claimant from working or preparing for work. Conditionality means work-related things an eligible adult will have to do in order to get full entitlement to Universal Credit. Each eligible adult will fall into one of six conditionality regimes based on their capability and circumstances. Different members of a household can be subject to the same or different requirements. As circumstances change claimants will also transition between different levels of conditionality.

Again, **in more vulnerable areas, the items list above are likely to be relatively high.**

When the rankings of both studies are accounted for (weighted in favour of the BRC study) the top 10 most vulnerable Intermediate Zones in Aberdeenshire are shown in Table 1 below. In keeping with national findings, the most vulnerable areas are also among the most deprived in the area, either from a geographical access standpoint or from a socio-economic perspective.

Table 1 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire according to the rankings of two major Covid Vulnerability Indices (ScotPHO and British Red Cross). The rankings are weighted in favour of the British Red Cross study due to the comprehensive nature of the index.

Code	Intermediate Zone Name
S02001343	Fraserburgh Harbour and Broadsea
S02001336	Peterhead Harbour
S02001341	Fraserburgh Lochpots
S02001331	Mintlaw
S02001324	Portsoy, Fordyce and Cornhill
S02001328	Gardenstown and King Edward
S02001325	Aberchirder and Whitehills
S02001285	East Cairngorms
S02001342	Fraserburgh Central-Academy

Age Vulnerability

The vulnerability of an individual is the risk that, once infected with Covid-19, they will develop serious illness and die. A person's risk of serious Covid-19 is a combination of their vulnerability and the risk that they get infected. The risk of getting infected depends on the prevalence of the virus in the local community (which can vary over time), and personal circumstances and activities that predispose to contact with the virus.

Among adults, the risk for severe illness from COVID-19 increases with age, with older adults at highest risk. Severe illness means that the person with COVID-19 may require hospitalisation, intensive care, or a ventilator to help them breathe, or they may even die. People of any age with **certain underlying medical conditions** are at increased risk of experiencing severe illness from COVID-19.

The overall rankings for this theme were based on two indicators:

1. The proportion of the total population aged 65+; and
2. The proportion of the population aged 65+ who have social care needs and are receiving Attendance Allowance (AA). AA is payable to people over the age of 65 who are so severely disabled, physically or mentally, that they need a great deal of help with personal care or supervision.

The overall rankings are weighted in favour of item 2 above as it was felt this would have a greater bearing on vulnerability than simply the age profile of an area.

When the weighted rankings are taken into account the top 10 most vulnerable Intermediate Zones in Aberdeenshire are shown in Table 2 below:

Table 2 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on specific age and health-related vulnerability factors

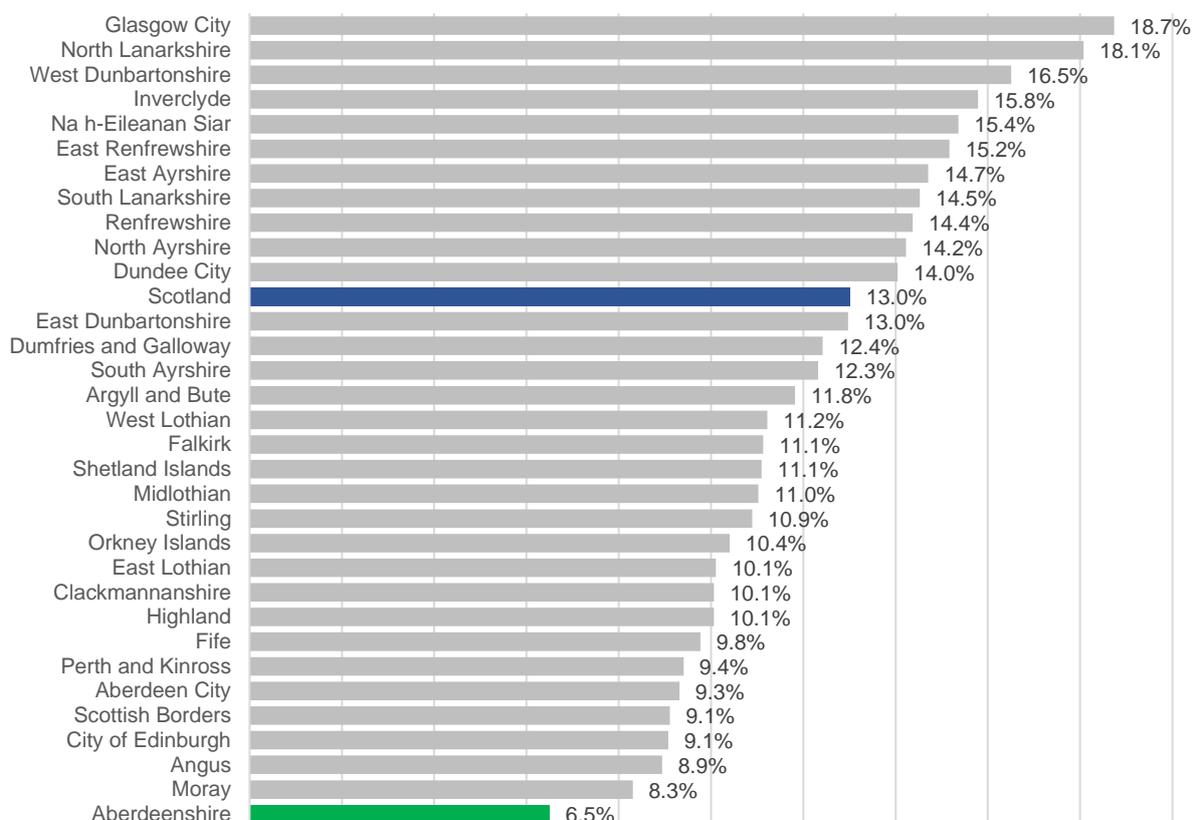
Code	Intermediate Zone Name	% of 65+ pop relative to AA Cases with Entitlement	% of 65+ pop relative to Total Population
S02001335	Peterhead Bay	13.5%	24.8%
S02001324	Portsoy, Fordyce and Cornhill	11.5%	26.2%
S02001342	Fraserburgh Central-Academy	13.4%	22.4%
S02001340	Fraserburgh Smiddyhill	11.7%	24.1%
S02001321	Huntly	10.0%	26.8%
S02001326	Banff	10.6%	23.6%
S02001287	Mearns and Laurencekirk	12.0%	19.7%
S02001328	Gardenstown and King Edward	10.0%	24.0%
S02001323	Turriff	9.7%	26.0%
	Aberdeenshire	6.5%	19.6%

Relatively high Attendance Allowance rates may also highlight areas where extra pressures are placed on families, especially if certain family members have caring responsibilities (the adult daughter caring for an older mother, for example). Even if there are no official caring responsibilities, certain elements of the COVID-19 experience (e.g. Lockdowns), could exacerbate the challenges faced by those in receipt of AA as well as their families.

There is a moderately strong positive correlation between AA rates and COVID-related death rates in that, where death rates are relatively high, so too is the AA rate.

At 6.5%, Aberdeenshire has the lowest proportion of AA cases relative to the population aged 65+ in Scotland (The Scottish average is 13.0%). The rates range from 6.5% in Aberdeenshire to 18.7% in Glasgow City, as Figure 2 below demonstrates.

Figure 2 – Proportion of Attendance Allowance cases relative to total population aged 65+, Scottish Local Authorities, February 2020



Latest data show AA numbers tend to remain relatively steady on a quarterly basis. Although figures beyond February 2020 are not available, it is unlikely that the numbers will have materially changed as a result of COVID-19. However, the next iteration of this report will incorporate future figures.

Health Vulnerability

Expert doctors in the UK have identified specific medical conditions that, based on what is known about the virus so far, place some people at greatest risk of severe illness from COVID-19. Disease severity, medical history or treatment levels will also affect who is in this group.

Clinically extremely vulnerable people may include:

- Solid organ transplant recipients
- People with specific cancers:
- People with cancer who are undergoing active chemotherapy
- People with lung cancer who are undergoing radical radiotherapy
- People with cancers of the blood or bone marrow such as leukaemia, lymphoma or myeloma who are at any stage of treatment
- People having immunotherapy or other continuing antibody treatments for cancer
- People having other targeted cancer treatments that can affect the immune system, such as protein kinase inhibitors or PARP inhibitors
- People who have had bone marrow or stem cell transplants in the last 6 months or who are still taking immunosuppression drugs
- People with severe respiratory conditions including all cystic fibrosis, severe asthma and severe chronic obstructive pulmonary disease (COPD)
- People with rare diseases that significantly increase the risk of infections (such as severe combined immunodeficiency (SCID), homozygous sickle cell)
- People on immunosuppression therapies sufficient to significantly increase risk of infection
- Women who are pregnant with significant heart disease (congenital or acquired).

The overall rankings for this theme were based on twenty-eight indicators including patients hospitalised with asthma, chronic obstructive pulmonary disease, and coronary heart disease, as well as emergency hospital admissions, maternal obesity and early deaths from cancer. These tend to be annual data sets.

Quarterly, monthly or weekly data sets used as part of the health rankings include cumulative deaths attributed to COVID-19, the number of households in receipt of Universal Credit with Limited Work Capability, and the proportion of the population in receipt of Personal Independence Payments (PIP).

Although twenty-eight indicators were used in determining the overall rankings, the final results are weighted in favour of COVID-related deaths. As such, the most vulnerable Intermediate Zones in Aberdeenshire from a health perspective are shown in Table 3 below.

Table 3 – Top 10 most vulnerable Intermediate Zones based on 28 health-related indicators (weighted in favour of COVID-related deaths)

<i>Code</i>	<i>Intermediate Zone Name</i>
S02001336	Peterhead Harbour
S02001342	Fraserburgh Central-Academy
S02001341	Fraserburgh Lochpots
S02001335	Peterhead Bay
S02001303	Inverurie North
S02001338	Longside and Rattray
S02001323	Turriff
S02001298	Banchory West
S02001337	Peterhead Ugieside
S02001308	Westhill North and South

The rate of deaths attributed to COVID per head of population tends not to be strongly correlated with any one indicator. That said, in areas where the COVID death rate is relatively high, bowel screen uptake tends to be relatively low. The same may be said of male and female life expectancy.

Age-related indicators also tend to be associated with higher death rates. For example, in areas where the death rate is relatively high, so too is the proportion of people aged 65+ in receipt of Pension Credits (a proxy for pensioner poverty). The same may be said of the

65+ population receiving Attendance Allowance (AA) benefits. As noted previously, AA is payable to people over the age of 65 who are so severely disabled, physically or mentally, that they need a great deal of help with personal care or supervision.

Interestingly, areas with higher COVID death rates also tended to have higher rates of babies exposed to second-hand smoke at 6-8 weeks and poorer child dental health. Dental health is widely used as an 'indicative measure' of children's general health. This is because it reflects a key 'outcome' of good parental care during childhood.

However, in most cases the correlation or relationship between the COVID death rate and the indicators listed above are only moderately strong – but they nonetheless suggest deprivation is a material factor, a finding that is reinforced by national statistics.

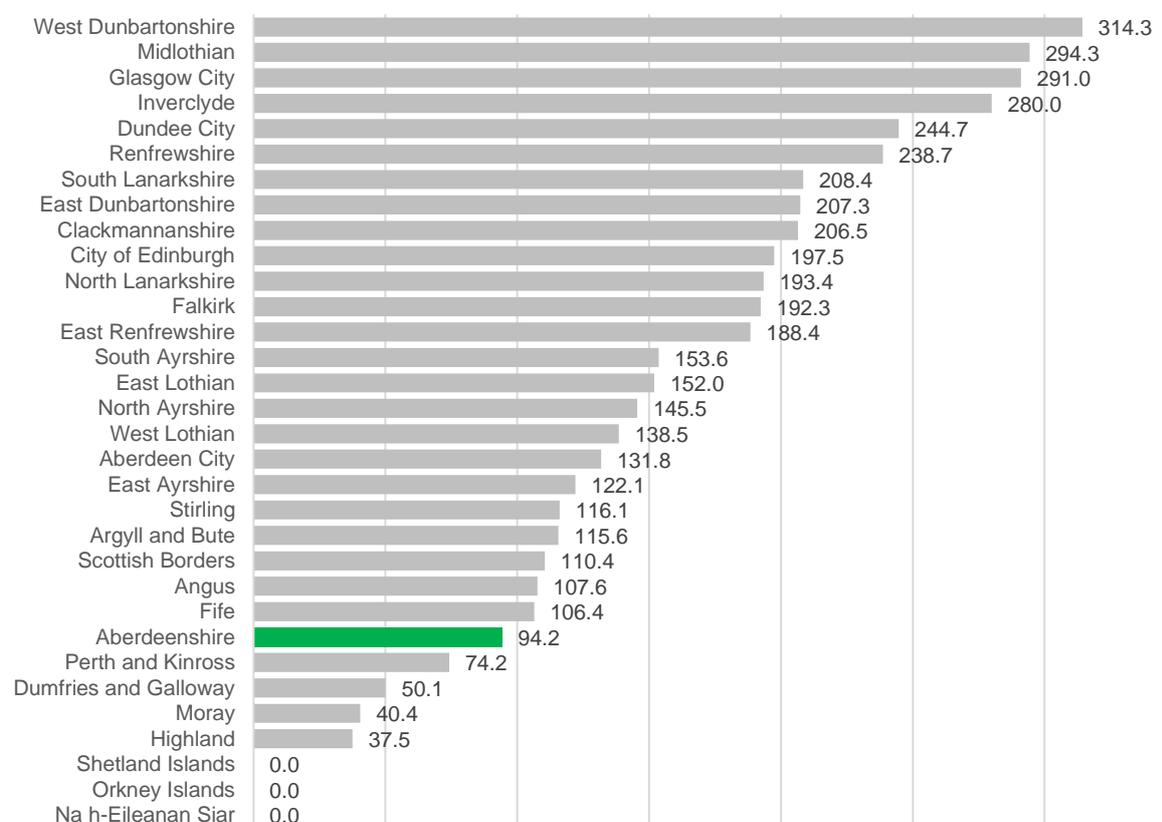
COVID-19-Related Deaths

The number of deaths in Scotland are on a downwards weekly trajectory and have remained relatively flat since the end of June 2020.

Between 1st of March and 31st of August 2020, Aberdeenshire recorded 118 COVID-related deaths⁴. COVID was the underlying cause in 112 of the 118 deaths. This equates to a death rate of 94 per 100,000 population, which was the 5th lowest in mainland Scotland at the time of writing.

Figure 3 below charts the cumulative COVID-related death rate in each of Scotland's local authority areas as at 31st August 2020.

Figure 3 – Age standardised death rates for Scottish Council areas between 1st March 2020 and 31st August 2020



⁴ <https://www.nrscotland.gov.uk/covid19stats>

During the same period (1st March to 31st August) Aberdeenshire recorded a total of 1,323 deaths from all causes. Therefore, COVID-related deaths accounted for 8.9% of total deaths in Aberdeenshire since 1st March 2020 (the 8th lowest proportion in Scotland).

The following Intermediate Zones are associated with at least 3 COVID-related deaths. These statistics may be affected by the location of care homes and other institutional settings within the region.

Table 4 – Intermediate Zones that have recorded at least 3 COVID-related deaths between 1st March and 31st August 2020

Code	Intermediate Zone Name	Number of Deaths	Population (2019 based)	Death rate per 100,000 population
S02001336	Peterhead Harbour	22	6,002	366.5
S02001308	Westhill North and South	11	5,138	214.1
S02001338	Longside and Rattray	7	7,626	91.8
S02001342	Fraserburgh Central-Academy	4	2,590	154.4
S02001298	Banchory West	4	2,877	139.0
S02001319	Insch, Oyne and Ythanwells	4	5,059	79.1
S02001303	Inverurie North	4	5,318	75.2
S02001337	Peterhead Ugieside	3	4,173	71.9
S02001323	Turriff	3	4,437	67.6
S02001287	Mearns and Laurencekirk	3	4,457	67.3
S02001330	Deer and Mormond	3	5,068	59.2
S02001316	Ythsie	3	6,093	49.2
S02001313	Ellon East	3	6,106	49.1
S02001339	Rosehearty and Strathbeg	3	6,269	47.9

The following statistics pertain to Scotland as whole:

- 46% of COVID-19 deaths registered to date related to deaths in care homes. 46% of deaths were in hospitals and 7% of deaths were at home or noninstitutional settings.
- After adjusting for age, people in the most deprived areas were 2.1 times more likely to die with COVID than those living in the least deprived areas. In Aberdeenshire, the more vulnerable areas generally tend to be among the most deprived in the region.
- Of those who died with COVID-19 between March and August, 92% had at least one pre-existing condition. The most common main pre-existing condition among those who died with COVID-19 was dementia and Alzheimer's disease (31%), followed by ischaemic heart disease (13%).
- Age-standardised death rates (adjusting for the age-structure of the population) were 43% higher for men than for women (193 vs 136 per 100,000 population for deaths occurring in March - August). Although the respective death rates are lower in Aberdeenshire, the same finding is pertinent, albeit the percentage difference is not as extreme. Indeed, the male COVID death rate is higher than the female rate in all but three local authorities in Scotland.

Economic Vulnerability

Emerging evidence on the social epidemiology of COVID-19 suggest that infections and deaths from the disease operate along existing axes of social inequalities, and that individuals from ethnic minorities, poorer socio-economic backgrounds and deprived areas are more likely to suffer⁵.

However, it is unclear how already existing intersecting inequalities at the household level might influence the short and long term consequences of the pandemic. Disease control measures mean that people spend much more time in their immediate households, due to

⁵ R.E. Jordan, P. Adab Who is most likely to be infected with SARS-CoV-2? the Lancet Infectious Diseases (2020), 10.1016/S1473-3099(20)30395-9

lockdowns, the need to self-isolate, and school and workplace closures. There is a good chance such measures will again be required to varying degrees over the coming months. This situation has led to concerns over financial, physical and psychological effects as well as potentially widening societal and health inequalities⁶.

Some household characteristics have become elevated in importance for wellbeing, such as access to a garden or safe outdoor space, technology and internet connectivity. Furthermore, global economic slowdown and rising unemployment may interact with these disparities and exacerbate already existing health- and socio-economic inequalities as the pandemic progresses.

The overall rankings for this theme were based on fifteen indicators including household income (especially households earning less than £20,000), income deprivation rates, unemployment rates including the rate of change over the past few months, universal credit claimants, and pensioner and child poverty.

Although fifteen indicators were used in determining the overall rankings, the final results are weighted in favour of lower-income households and an area's respective unemployment rate (including the rate of change). As such, the most vulnerable Intermediate Zones in Aberdeenshire from an economic perspective are shown in Table 5 below.

Table 5 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on fifteen economic indicators (weighted in favour of lower-income households and areas with relatively high unemployment rates, including the rate of change).

Code	Intermediate Zone Name	% of households earning less than £20k (2019)	Unemployment Rate (May '20)	Change in Unemployment Rate (Jan-May '20)
S02001343	Fraserburgh Harbour and Broadsea	50.5%	10.2%	+ 5.6%
S02001336	Peterhead Harbour	47.0%	10.8%	+ 5.1%
S02001341	Fraserburgh Lochpots	41.0%	8.1%	+ 3.7%
S02001342	Fraserburgh Central-Academy	41.6%	6.0%	+ 2.9%
S02001335	Peterhead Bay	42.3%	7.0%	+ 2.6%
S02001326	Banff	38.0%	5.9%	+ 2.6%
S02001321	Huntly	39.7%	5.9%	+ 2.0%
S02001327	Macduff	36.6%	5.5%	+ 2.6%
S02001304	Inverurie South	32.2%	6.2%	+ 2.7%
S02001324	Portsoy, Fordyce and Cornhill	34.3%	5.1%	+ 2.4%
	Aberdeenshire	23.5%	3.8%	+ 2.0%

COVID-19 – Economic Implications

The outlook for the UK economy is increasingly pessimistic. The latest UK GDP data for March 2020 was down 5.8% compared to February (and down 2% over the first quarter of 2020). The average of independent forecasts for the UK suggests a fall of 8.6% in GDP in the UK.

The Bank of England scenario analysis (7 May) suggests that UK GDP could fall by 14% in 2020 with a bounce back to growth of 15% in 2021. Unemployment could rise to 8% in 2020 and remain elevated at 7% in 2021.

The Bank of England and the Office for Budget Responsibility (OBR) have in recent analysis assumed a V-shaped recovery, that is, a short, sharp decline in economic activity followed swiftly by a rebound in growth within 12 months. As more economic data emerge, there is a growing recognition that a quick rebound in economic activity following the phasing out of lockdown may be unlikely.

⁶ Douglas M, Katikireddi SV, Taulbut M, et al. Mitigating the wider health effects of covid-19 pandemic response. The British Medical Journal 2020;369(m1557) doi: 10.1136/bmj.m1557

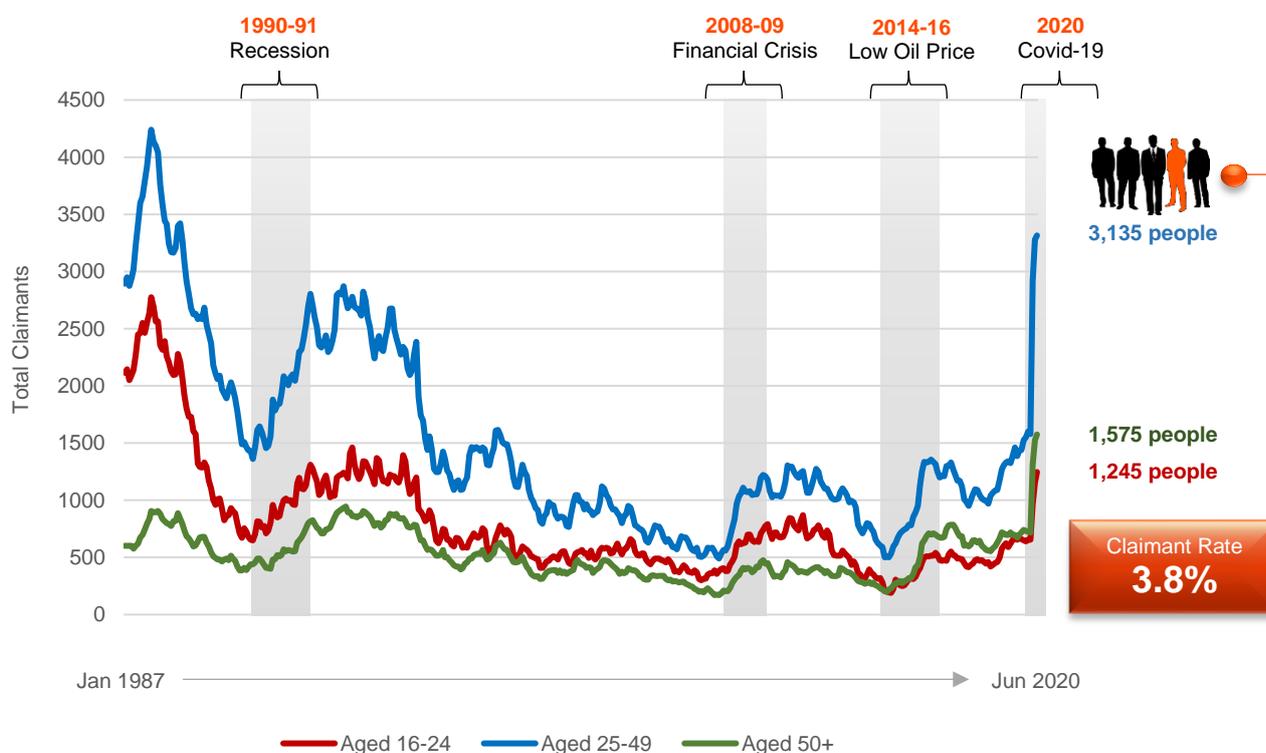
The Scottish economy will recover from the current impacts of COVID-19, but the shape and speed of adjustment are uncertain. Although physical distancing measures are expected to be temporary in nature, there is potential for even short-term measures to have long lasting impacts and become more structural.

The path of the recovery remains uncertain for several reasons¹⁰:

- as business and society reopens the output contraction will likely reverse for many parts of the domestic economy. However, not all sectors will come back immediately as external demand, consumer tastes, and business models will have changed significantly. This will present challenges and opportunities for different segments of the business base reflecting their exposure to different economic channels - both external and domestic. The crisis may also accelerate some structural changes that were already happening, such as a switch from high street retail to online. This may negatively impact on Aberdeenshire’s town centres over the coming years.
- Loss of productive capacity will likely endure as the restrictions in economic activity continue and this will lengthen the recovery period. This is mirrored in the labour market as unemployment rises significantly and the scarring effects that has on individuals and communities. The number of people on Universal Credit, for example, increased by 88% in May 2020 relative to the month prior to Lockdown (increasing from 6,649 people in February 2020 to 12,496 in May 2020). Aberdeen City recorded a similar percentage increase. In both cases this is higher than the corresponding increase for Scotland as a whole (72%).

Figure 4 below charts Aberdeenshire’s claimant count (unemployment benefit recipients) from 1987 to June 2020 per broad age group and places the COVID pandemic in the context of previous recessions and crises.

Figure 4 – Claimant count per broad age group, Aberdeenshire, Jan 1987 to Jun 2020



The Claimant Count measures the number of people claiming unemployment related benefit in the UK. Aberdeenshire's claimant count has, like the rest of Scotland, increased over the last few months to levels not seen since the 1990/91 UK-wide recession. Approximately 6,135 people claimed unemployment benefits in Aberdeenshire over the course of June 2020, up from 2,975 in February (prior to Lockdown). That equates to 3.8% of the total population aged 16-64, up from 2.3% in February (see Figures 5 and 6, right). Although this is the 3rd lowest rate in Scotland, it is a relative 'shock' in the context of recent local employment data and could potentially push a greater proportion of residents and families closer to the threshold of relative deprivation. The situation may be exacerbated once the existing furlough scheme expires.

Figure 5 - Claimants as a proportion of the total population aged 16-64, Aberdeenshire and Scotland, Jan 2001 to Jun 2020

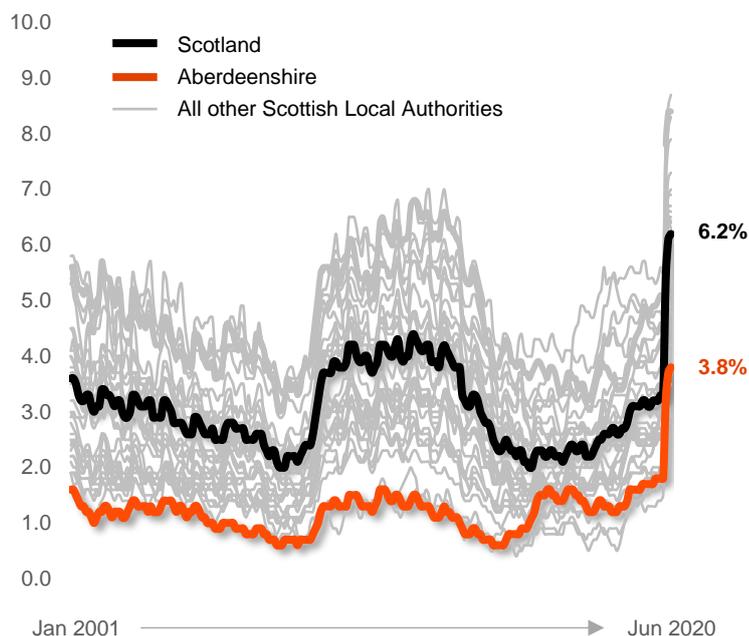
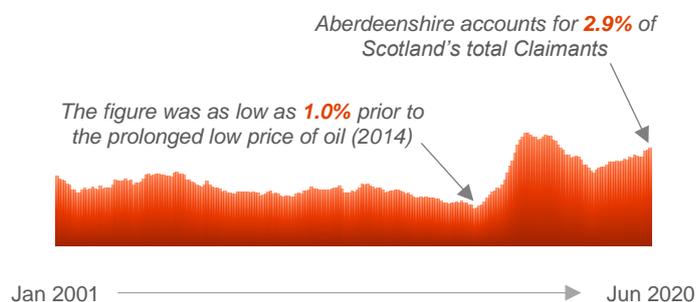


Figure 6 - Aberdeenshire's Claimants as a percentage of Scotland's total, Jan 2001 to Jun 2020



The end of furlough may see some people lose their jobs and making an application for Universal Credit. Evidence from Citizens Advice Scotland report proportionally large rise in requests for employment-related advice since the start of the pandemic and for advice on the private rented sector. For those in receipt of up to £83 per month the additional Universal Credit payments will cease at the end of March 2021, increasing the financial burden on those households.

The longer the measures are in place, the harder the impact will be on the public finances and the less scope there will be for a fiscal stimulus in the recovery, with a greater risk of wider economic contagion.

The economy will recover but the path and speed of recovery will mirror success in managing the health crisis and will require careful planning and management of economic activity so that society can operate in a different but productive manner

Other Socio-Economic Vulnerability

The overall rankings for this theme were based on thirty indicators including geographic deprivation, superfast broadband availability, digital vulnerability, food vulnerability, loneliness, overcrowded households, addresses with private outdoor space and the average

distance to the nearest park, garden or playing field. Data pertaining to at-risk sectors/jobs were also included as part of the overall rankings.

Although thirty indicators were used in determining the overall rankings, the final results are weighted in favour of a suite of vulnerability indices (digital, food, financial, and hardship fund vulnerability). Extra weightings were also placed on overcrowded households, measures of loneliness, and sectors at-risk as a result of COVID-19 (e.g. accommodation and food services, retail, as well as the arts, entertainment, recreation and other services). As such, the most vulnerable Intermediate Zones in Aberdeenshire based on a selection of socio-economic indicators are shown in Table 6 below.

Table 6 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on a selection of 30 socio-economic indicators (weighted in favour of digital vulnerability, food vulnerability, financial vulnerability, overcrowded households, loneliness and the proportion of workers employed within at-risk sectors).

Code	Intermediate Zone Name
S02001339	Rosehearty and Strathbeg
S02001325	Aberchirder and Whitehills
S02001329	New Pitsligo
S02001285	East Cairngorms
S02001338	Longside and Rattray
S02001330	Deer and Mormond
S02001328	Gardenstown and King Edward
S02001300	Cromar and Kildrummy
S02001331	Mintlaw
S02001336	Peterhead Harbour

Digital vulnerability is very strongly correlated to indicators that suggest income deprivation. Digitally vulnerable areas are far more likely to contain a relatively large proportion of households earning less than £20,000. As such, digitally vulnerable areas are likely to contain relatively high rates of child poverty, pensioner poverty, single person households, households without access to a car or van. There is also a health dimension in that digitally vulnerable areas are also likely to contain a relatively high proportion of the population in receipt of Personal Independence Payments. These payments help with some of the extra costs caused by long-term disability, ill-health or terminal ill-health.

Given that digitally vulnerable areas are among the least deprived in terms of geographic access, they are therefore far more likely to be found in urban areas. Parts of Huntly, Fraserburgh, Peterhead, Mintlaw, Turriff and Macduff are among the most digitally vulnerable in Aberdeenshire.

Food vulnerability is less strongly correlated to certain other indicators – but moderately strong correlations do exist. Food vulnerability is associated with indicators that suggest ‘remoteness’ and ‘accessibility’. More vulnerable areas are therefore more likely to be associated with longer drive times to various local amenities, especially retail centres and secondary schools. They are also likely to be farther away from foodbanks, as well as parks, public gardens or playing fields.

There is also a moderate relationship between food vulnerability and child poverty in that more vulnerable areas are more likely to be associated with higher rates of children in low income families. More vulnerable areas are also more likely to contain a relatively high proportion of people over the age of 65 relative to the total population.

Therefore, food vulnerability appears to be associated with remoter areas that tend to have higher rates of child poverty and older people. Parts of East Cairngorms, New Pitsligo, Portsoy, Fordyce and Cornhill, Rosehearty and Strathbeg are among the most vulnerable in Aberdeenshire in this respect.

The proxy measurement for loneliness – The Loneliness Prescription Index – is based on an approach developed by the Office for National Statistics' Data Science Campus, which uses GP prescription data to find areas with above-average prescriptions for five conditions where loneliness has been shown to be a risk factor: Alzheimer's, depression, high blood pressure, anxiety and insomnia. Areas with a relatively high incidence of such prescriptions tend to be located in and around the 'Buchan Corner' – Mintlaw, Deer and Mormond, New Pitsligo, Auchnagatt, Longside and Rattray. Other areas include Stonehaven (North and South), Macduff, Crathes and Torphins, Ythanside and Balmedie and Potterton.

In terms of jobs in at-risk sectors, the more vulnerable areas are contained in the tables below. Each table relates to one of the three sectors considered 'at-risk' as a result of COVID.

Table 7 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on the proportion of jobs within an 'at-risk' sector. In this case Arts, entertainment, Recreation and Other Services (2018)

Intermediate Zone Name	% of Jobs
Stonehaven North	13.3
East Cairngorms	12.0
Westhill Central	12.0
Banchory West	10.0
Aboyne and South Deeside	10.0
Howe of Alford	8.6
Newtonhill	8.3
Newmachar and Fintray	8.3
Crathes and Torphins	8.0
Barrahill	7.5

Table 8 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on the proportion of jobs within an 'at-risk' sector. In this case Accommodation and Food Services (Hospitality) (2018)

Intermediate Zone Name	% of Jobs
Aberchirder and Whitehills	25.0
Banchory West	24.0
East Cairngorms	18.0
Ythsie	15.0
Dunecht, Durris and Drumoak	14.3
Westhill Central	14.0
Rosehearty and Strathbeg	12.5
Mintlaw	12.5
Newmachar and Fintray	11.1
Ellon West	10.7

Table 9 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on the proportion of jobs within an 'at-risk' sector. In this case Retail (2018)

Intermediate Zone Name	% of Jobs
Newtonhill	33.3
Portlethen	30.0
Inverurie South	25.0
Huntly	20.0
Banchory East	20.0
Westhill Central	18.0
Fraserburgh Central-Academy	18.0
Ellon East	18.0
Fraserburgh Smiddyhill	17.1
East Cairngorms	16.0

Overall Vulnerability

When all the various indicators within each of the themes are accounted for, the most vulnerable areas overall are shown below.

Figure 7 – Intermediate Zones in Aberdeenshire ranked according to their respective rankings per the following themes: COVID Vulnerability; Age Vulnerability; Health Vulnerability; Economic Vulnerability; and Other Socio-Economic Vulnerability.

Areas in the north of Aberdeenshire and urban areas tend to be more vulnerable, according to the various indicators and themes contained in this report.

Some of the more rural areas, whilst vulnerable in certain respects due to geographic remoteness and poorer internet connections, tend to be less vulnerable.

Areas to the west and south of Aberdeen City are among the least vulnerable in Aberdeenshire.

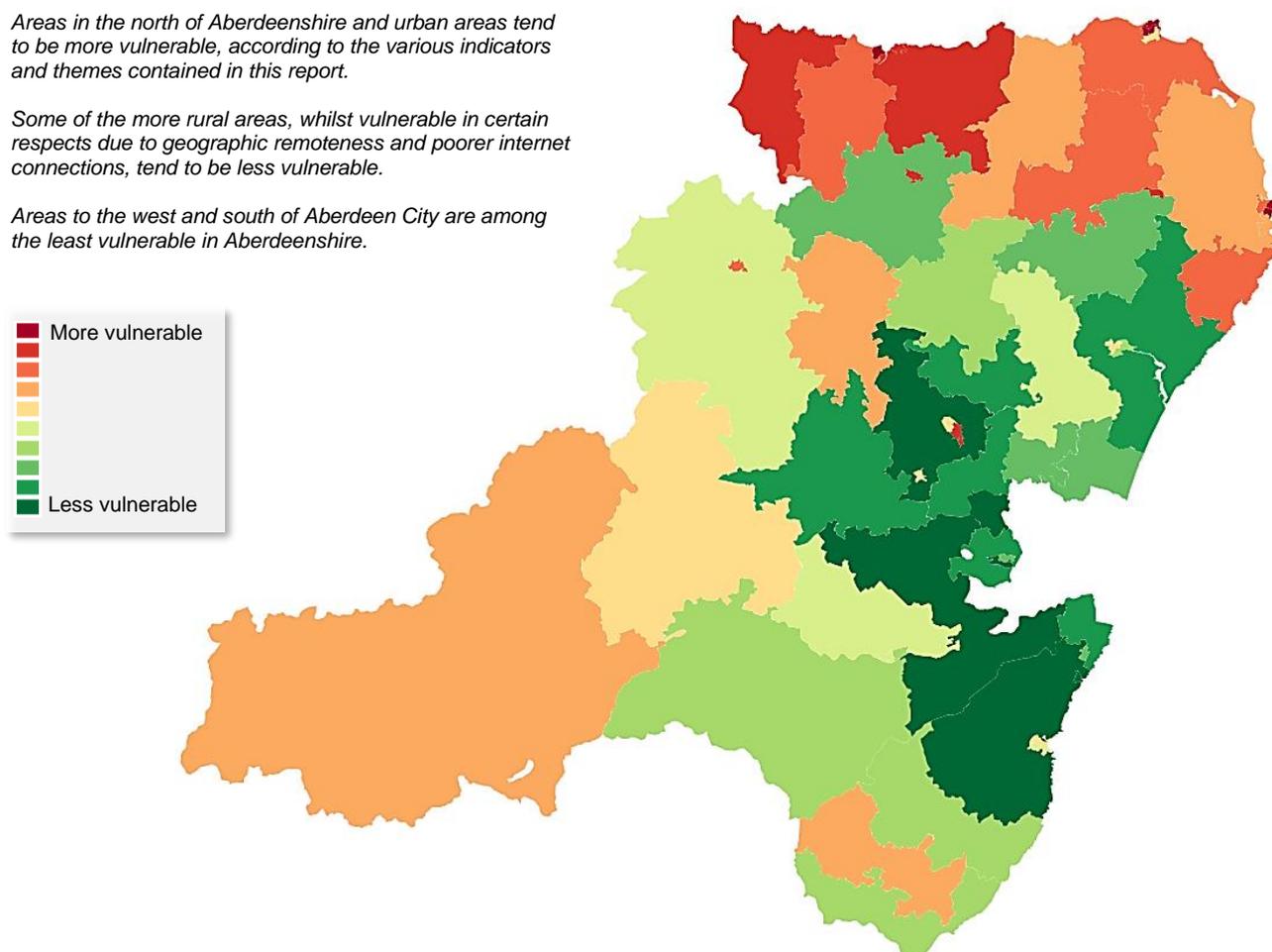


Table 10 – Top 10 most vulnerable Intermediate Zones in Aberdeenshire based on weighted rankings per vulnerability theme

CODE	INTERMEDIATE ZONE NAME	VULNERABILITY THEME RANKING (1 = Worst Ranking; 59 = Best Ranking)				
		COVID	AGE	HEALTH	ECONOMIC	OTHER SOCIO-ECONOMIC
S02001336	Peterhead Harbour	2	12	1	2	10
S02001342	Fraserburgh Central-Academy	9	3	2	4	12
S02001335	Peterhead Bay	13	1	4	5	42
S02001343	Fraserburgh Harbour and Broadsea	1	19	20	1	11
S02001341	Fraserburgh Lochpots	3	26	3	3	25
S02001326	Banff	17	6	11	6	15
S02001324	Portsoy, Fordyce and Cornhill	5	2	30	10	13
S02001323	Turriff	15	9	7	12	19
S02001331	Mintlaw	4	11	28	18	9
S02001327	Macduff	12	16	24	8	14

APPENDIX

¹ <https://www.ifs.org.uk/inequality/COVID-19-and-inequalities/>

² <https://www.ippr.org/blog/what-does-COVID-19-mean-for-the-labour-market-prospects-of-young-people-in-scotland>

³ <https://www.ifs.org.uk/publications/14791>

⁴ COVID-19: Industry Focus, Where Next for Oil & Gas, PwC, 2020

⁵ <http://graphics.wsj.com/oil-barrel-breakdown/>

⁶ Coronavirus (COVID-19): the case for extending the Brexit transition period, Scottish Government, June 2020

⁷ <https://www.aberdeenshire.gov.uk/media/22216/2018-03-15-aberdeenshire-council-position-on-post-brexit-funding-final.pdf>

⁸ https://consult.gov.scot/economic-development/replacement-of-european-structural-funds/consultation/view_respondent?show_all_questions=0&sort=submitted&order=ascending&_q__text=aberdeenshire+coun
cil&uuld=1005439733

⁹ <https://lgiu.org/briefing/COVID-19-recovering-from-the-virus-sustainable-local-economic-strategies/>

¹⁰ State of the Economy, Office of the Chief Economic Advisor, Scottish Government, April 2020