



Wylfa Newydd Project

6.3.1 ES Volume C - Project-wide effects C1 - Socio-economics

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Contents

1	Socio-economics	1
1.1	Introduction	1
1.2	Study area	1
1.3	Baseline environment	2
	<i>Skills and local labour</i>	2
	<i>Accommodation and spatial distribution of the workforce</i>	3
	<i>Public services</i>	3
	<i>Tourism</i>	5
	<i>Business and supply chain</i>	6
1.4	Design basis and activities	7
	<i>Construction</i>	7
	<i>Operation</i>	19
	<i>Decommissioning</i>	21
1.5	Assessment of effects.....	22
	<i>Construction</i>	23
	<i>Operation</i>	44
	<i>Decommissioning</i>	52
1.6	Additional mitigation.....	55
	<i>Construction</i>	55
	<i>Operation</i>	63
	<i>Decommissioning</i>	63
1.7	Residual effects	63
1.8	References	71

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1 Socio-economics

1.1 Introduction

- 1.1.1 This chapter describes the assessment of potential project-wide socio-economic effects. This assessment considers the socio-economic topics which could be affected by the Wylfa Newydd Project as a whole. These are skills and local labour, accommodation and spatial distribution of the workforce, public services, tourism and business and supply chain.
- 1.1.2 This chapter is supported by chapter B2 (socio-economics) (Application Reference Number: 6.2.2) for the technical basis of the assessment including a summary of legislation, policy and guidance, key points arising in consultation that have guided the socio-economic assessment, assessment methodologies and criteria.
- 1.1.3 In addition, appendix C1-1 (Socio-economic Baseline Report) (Application Reference Number: 6.3.8) presents a detailed socio-economic baseline which supports the assessment presented in this chapter. Appendix C1-2 (Socio-economic Technical Appendix) (Application Reference Number: 6.3.9) provides the technical detail which supports each of the topic assessments presented here. Community cohesion effects are considered within a separate appendix to this chapter, appendix C1-3 (Community Cohesion Report) (Application Reference Number: 6.3.10).
- 1.1.4 Localised effects are assessed within socio-economics chapters D3 (Application Reference Number: 6.4.3), E3 (Application Reference Number: 6.5.3), F3 (Application Reference Number: 6.6.3), G3 (Application Reference Number: 6.7.3), and H3 (Application Reference Numbers: 6.8.3). These specifically relate to one of the individual developments within the Wylfa Newydd Project, such as effects on businesses located near the Wylfa Newydd Development Area, Off-Site Power Station Facilities or one of the Associated Developments.

1.2 Study area

- 1.2.1 This section describes the study areas relevant to the project-wide socio-economic assessment.
- 1.2.2 Defining the spatial scope for socio-economic assessments can be complex because of the wide range of receptors and the different ways they might be affected.

In addition, socio-economic baseline data are often reported over a range of spatial scales (e.g. wards and local authority administrative boundaries). The need to assess and compare data at a detailed level but also at a higher (regional/national) level means a range of spatial scopes have been selected throughout the assessment, depending on the topic. The geographic scope for this socio-economic assessment is detailed in table B2-11 in chapter B2 (Application Reference Number: 6.2.2) and is shown on figures C1-1 and C1-2 (Application Reference Number: 6.3.32). It comprises the key socio-economic study area (KSA), and the Daily Construction Commuting Zone

(DCCZ). A local area of influence (LAI) is also identified around each of the sites that form part of the Wylfa Newydd Project. It is at this level that localised effects discussed in socio-economics chapters in chapters D3 (Application Reference Number: 6.4.3), E3 (Application Reference Number: 6.5.3), F3 (Application Reference Number: 6.6.3), G3 (Application Reference Number: 6.7.3), and H3 (Application Reference Numbers: 6.8.3) are considered.

1.3 Baseline environment

1.3.1 This section provides a summary of the baseline conditions for socio-economics within the study areas described in section 1.2.

1.3.2 The appendix C1-1 (Application Reference Number: 6.3.8) contains more detailed information on all of the topics discussed in the section and is used to support the assessment of effects presented later in this chapter.

Skills and local labour

Population

1.3.3 Anglesey has a population of approximately 70,000 representing 18.5% of the population of the DCCZ and just over 2% of the Welsh population of 3.1 million [RD1]. Of the population of Anglesey, 57.2% can speak Welsh which is the second highest rate in Wales [RD2].

1.3.4 Anglesey's population is expected to grow by 9.5% between 2016 and 2035 as a result of the Energy Island Programme [RD3].

Employment

1.3.5 There has been a recent decrease in the local employment rate on Anglesey [RD4]. This is likely to be, at least partially, the result of the decommissioning of the Existing Power Station. In Wales and north Wales the employment rate increased, as shown below in table C1-1.

Table C1-1 Working age employment rate by area (January to December, 2015 and 2016)

Date	Isle of Anglesey (%)	North Wales (%)	Wales (%)
Jan 2015-Dec 2015	73.8	72.3	70.3
Jan 2016-Dec 2016	70.8	73.2	71.2

Skills and qualifications

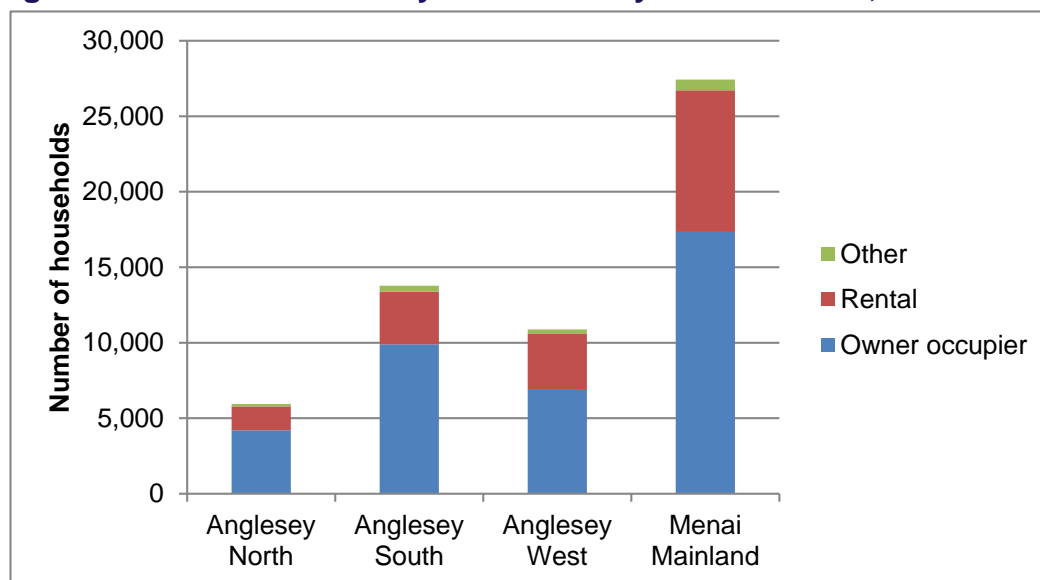
1.3.6 The skills profile of the Anglesey workforce shows that 24.2% of residents have no formal qualifications compared to 25.9% for the rest of Wales in 2011 [RD5].

1.3.7 The analysis of occupation data shows that Anglesey's resident workforce contains a relatively high proportion of high-level skills (standard occupational classification groups 1 to 3) compared to the rest of Wales [RD6].

Accommodation and spatial distribution of the workforce

1.3.8 As shown in figure C1-3, owner-occupation is the dominant tenure in the housing stock throughout the KSA [RD5]. The median house prices of £160,000 on Anglesey, as of April 2016, are above neighbouring local authorities.

Figure C1-3 Stock tenure by household by KSA sub area, 2011



1.3.9 In terms of available capacity, the number of new homes being built on Anglesey has decreased by approximately 60% between 2008-09 and 2015-16, which is a larger decline than across Wales as a whole (3.2%) [RD7]. In contrast, the number being built in neighbouring Conwy rose by 48% over the same period [RD7]. The number of empty houses on Anglesey rose from 699 in 2012 to 855 in 2014. In terms of the proportion of second homes, the area ranked as the ninth-highest for local authority areas in England and Wales. Efforts are being made to reverse these negative trends over time, as outlined in the Joint Local Development Plan (JLDP) [RD8].

Public services

Healthcare facilities

1.3.10 In terms of the amount of facilities available in the KSA, there are:

- 23 GP surgeries: 11 on Anglesey and 12 in Menai Mainland;
- 23 pharmacies: 13 on Anglesey and 10 in Menai Mainland;
- two hospitals: Ysbyty Gwynedd located in Bangor that contains an Accident and Emergency Unit and Ysbyty Penrhos Stanley located at Holyhead on the Isle of Anglesey that contains a Minor Injuries Unit; and
- three ambulance stations; located in Amlwch, Holyhead, and Llangefni.

1.3.11 Further information on healthcare facilities can be found in the baseline appendix C1-1 (Application Reference Number: 6.3.8) and the Health Impact Assessment (HIA) section C.6 (demand for medical and healthcare services), section L.3.116 (topic-specific methodologies and assessment criteria) and

section M (HIA baseline appendix) (Application Reference Number: 8.19). Health service locations are shown in figure L-6 of the HIA (Application Reference Number: 8.19).

Education

- 1.3.12 Anglesey's education provision currently consists of 47 primary schools and five secondary schools, which catered for 5,736 and 3,859 pupils respectively in 2016 [RD9 and RD10].
- 1.3.13 Overall, there is an excess of places in relation to current pupils across the KSA although there are capacity issues at specific primary schools.
- 1.3.14 It should be recognised that a school modernisation programme is planned which will reduce excess capacity in some areas. The Isle of Anglesey County Council (IACC) provided an updated forecast that takes into consideration this plan until 2021¹ and predicts a decrease in surplus capacity.

Table C1-2 IACC forecast of primary school places on Anglesey

Surplus Places	2016	2017	2018	2019	2020	2021
Projected number of surplus places	630	484	262	279	294	288
% surplus places	11	8	5	5	5	5

Emergency services

- 1.3.15 Information on the capacity of the Police Force and Fire service is available below in table C1-3.

Table C1-3 Capacity of emergency services in north Wales

Emergency service provision	Police Force	Fire service
Stations in north Wales	10 ²	44
Staff in north Wales ³	2,615	850

- 1.3.16 There is a relatively low level of crime on Anglesey compared to surrounding areas. In the year to March 2016, there were 42 crimes per 1,000 people, whilst across north Wales there were 56 crimes per 1,000 people [RD11].
- 1.3.17 Within the KSA, the fire service has day-crewed stations in Holyhead, Caernarfon and Bangor (i.e. personnel on station between the hours of 1200-2200). The remaining stations are Retained Duty Stations with crews only attending the fire station when they receive an emergency callout.
- 1.3.18 For the Ambulance Service, capacity could not be explicitly established but insight can be gained from the response rate to calls. In September 2015, 2.4% of all calls made to the Welsh Ambulance Service were made on

¹ Projects associated with the modernisation programme have only been confirmed until 2018/19.

² Figure represents stations in KSA.

³ Support and Front-line staff are included in these figures.

Anglesey, of which around 36% were immediately life-threatening (category A). Around 51% of the category A calls on Anglesey were answered within the allotted eight minutes, below the Welsh average of 56% [RD1].

Recreation and leisure facilities

- 1.3.19 The number of visits to public libraries on Anglesey in 2014-15 was one of the lowest across Wales at 4,200 per 1,000 population. It was substantially below the Welsh average of 5,526 per 1,000 population.
- 1.3.20 In 2014-15, there were around 8,400 visits per 1,000 population to local authority sport and leisure centres on Anglesey, slightly below the Welsh average 8,700 per 1,000 population [RD10].
- 1.3.21 Table C1-4 presents the publicly owned library facilities and leisure centres within the KSA by area.

Table C1-4 Recreational facilities within the KSA by area

Facility	Anglesey North	Anglesey West	Anglesey South	Menai Mainland
Library	Cemaes	Holyhead	Benllech	Bangor
	Amlwch	Rhosneigr	Llangefni	Caenarfon
	Moelfre	-	Beaumaris	-
	-	-	Menai Bridge	-
Leisure centre	Amlwch	Holyhead	David Hughes	Arfon ⁴
	-	-	Plas Arthur	Bangor
	-	-	-	Plas Ffrancon
	-	-	-	Plas Silyn

Tourism

- 1.3.22 Tourism is vital to the economy of Anglesey. Tourist expenditure provided £279 million in 2015, a growth of 7% on the previous year. This is in contrast with Gwynedd which experienced a 1.2% decrease in tourism-related expenditure from the previous year. North Wales is seen as a popular destination with tourism contributing £2.9 billion in economic activity, a substantial 37% of the tourism economy of Wales (£7.7 billion) [RD12].
- 1.3.23 Specifically, the accommodation and food and drink sectors within the tourism economy contribute direct tourism revenues of £43.6 million and £40.2 million respectively out of the aforementioned £279 million within Anglesey. Recreation, including sport and other outdoor activities, contributes £15.9 million [RD12].

⁴ Arfon contains two separate facilities, a leisure centre and a tennis centre.

1.3.24 Tourism is central to employment and education on Anglesey with 4,000 jobs being tourism-related and a large number of work-based learning programmes available for leisure⁵ and hospitality, as shown below in table C1-5. This table also shows the programmes across north Wales.

Table C1-5 Number of leisure and hospitality work-based learning programmes by area⁶

Area	Isle of Anglesey	Gwynedd	Conwy	Denbigh-shire	Flintshire	Wrexham
Leisure	-	15	35	40	30	55
Hospitality	60	85	135	110	100	75

Business and supply chain

1.3.25 In terms of gross value added (GVA), Anglesey accounts for around 1.7% of the Welsh economy, the smallest of all the NUTS3⁷ areas in Wales as shown below in table C1-6. Over the 2008 to 2015 period, Anglesey's GVA rose by 5.6%, in contrast to growth of 15.6% for Wales as a whole. This is partly due to the closure of Anglesey Aluminium in 2010.

Table C1-6 Workplace-based GVA by area at current basic prices⁸

Year	Isle of Anglesey	Gwynedd	Conwy and Denbighshire	Flintshire and Wrexham	Wales
2008 (£million)	888	2,063	2,989	4,895	48,261
2015 (£million)	938	2,317	3,370	6,197	55,788
% increase between 2008 and 2015	5.6	12.3	12.7	26.6	15.6
Workplace based GVA as % of Wales	1.7	4.2	6.0	11.1	100

⁵ This represents a variety of programmes: leisure, sport and travel work-based learning programme apprenticeships.

⁶ [RD13]

⁷ Nomenclature of Units for Territorial Statistics (NUTS) is a hierarchical classification of administrative boundaries. NUTS3 refers to an administrative level comprising countries or groups of unitary authorities with a population size ranging 150,000 to 800,000.

⁸ [RD14]

- 1.3.26 In terms of industry groups, Anglesey possesses above average shares of output in agriculture, forestry and fishing; distribution, transport, accommodation and food; and construction, as shown below in table C1-7.

Table C1-7 Industry GVA as a proportion of area total⁹

Industry group	A: Agriculture, forestry and fishing	F: Construction	GHI: Distribution, transport, accommodation and food
Isle of Anglesey	6.5%	1.7%	24.5%
Wales	6.0%	0.7%	16.9%

- 1.3.27 On Anglesey, there are higher proportions of sole proprietors and partnerships (31.3% and 18.2% respectively) than the north Wales (23.2% and 15.8%) and Wales average (21.6% and 14.1%). This is likely to reflect the high proportion of agricultural units.

1.4 Design basis and activities

- 1.4.1 This section sets out the design basis for this assessment of effects. It sets out where any assumptions have been made to enable the assessment to be carried out at this stage in the evolution of the design. This section also identifies the embedded and good practice mitigation that will be adopted to reduce adverse effects as inherent design features or by implementation of standard industry good working practice.
- 1.4.2 As described in chapter B1 (introduction to the assessment process) (Application Reference Number: 6.2.1), the application for development consent is based on a parameter approach. This chapter has assessed a worst case scenario from a socio-economic perspective taking into consideration the flexibility afforded by the parameters.

Construction

Basis of assessment and assumptions

- 1.4.3 The socio-economic assessment of the Wylfa Newydd Project uses the peak construction workforce numbers as the basis of the assessment. The construction workforce is anticipated to peak at around 8,500 workers. However, to ensure that the Wylfa Newydd Project can be flexible to the pressures of unforeseen increased demand, the assessment is based on circa 9,000 workers. This position has been taken to represent the worst case scenario from a socio-economic perspective based on fixed project-wide elements, such as worker-numbers and available bed-spaces across tenures, for the purposes of this Environmental Statement.
- 1.4.4 Whilst it is recognised that effects may also arise as a result of lower levels of workers over a longer period, the significance of any such effects are

⁹ [RD14]

considered to be lower than any assessed at peak. It should also be noted that while the assessment is conducted at peak, the mitigation will be put in place early to facilitate the avoidance, reduction or mitigation of effects at any point at which they may arise.

- 1.4.5 The workforce information discussed below serves as the basis for the assessment of effects for all of the socio-economic topics discussed in this chapter.
- 1.4.6 Figure C1-4 shows an indicative quarterly profile of the workforce for the Wylfa Newydd Project during the construction phase. It is based on an assumption of 63 months between the First Nuclear Construction¹⁰ and the Commercial Operation Date for Unit 1, with the commercial operation date for Unit 2 around 18 months later. This workforce profile includes the workers required for the construction and operation of the Power Station Site, the Off-Site Power Station Facilities and Associated Development, noting that Power Station operational workers will join the workforce during the construction period and overlap.
- 1.4.7 Figure C1-5 shows the trade breakdown for the indicative workforce profile. This does not include management, operations or support staff which are included in figure C1-4. This informs the assessment of skills and local labour, and the assessment of accommodation effects.
- 1.4.8 As noted above, taking a 'worst case scenario' for assessment purposes the total number of workers at the peak construction phase is 9,000. Up to 4,000 of these will be accommodated within the Site Campus; approximately 3,000 are expected to enter existing/new accommodation within the KSA and an estimated 2,000 are expected to be already residing in the KSA and represents the local workforce.
- 1.4.9 Figure C1-6 shows the expected profile of accommodation take-up for the indicative workforce profile. This encompasses all accommodation stock types, including the provision of the Site Campus bed spaces as identified within the Workforce Accommodation Strategy (Application Reference Number: 8.4). These bed spaces will become available once workforce thresholds have been met, as set out in a DCO requirement. Figure C1-6 shows the expected distribution of workers between various accommodation and does not indicate any preference for prioritising any stock type provider over another.
- 1.4.10 In order to support the assessment and identify the potential effects at a more localised scale than the DCCZ, a gravity model has been used to provide a means of predicting the possible location of the construction workforce within the DCCZ. This is a model which identifies the likely spatial distribution of employees during the construction stage of the Wylfa Newydd Project and the results of the model form the basis of the assessment presented in this chapter.

¹⁰ First Nuclear Construction is the date of the first irreversible construction (usually pouring of the structural concrete) for buildings with nuclear safety significance.

- 1.4.11 The gravity model distributes workers during the construction period based on two groupings:
- home-based: those workers commuting from their main residence on a daily basis; and
 - non-home-based: those workers who would take temporary accommodation in the vicinity of the site due to the impracticalities of commuting on a daily basis from their main residence.
- 1.4.12 The gravity modelling methodology is outlined in chapter B2 (Application Reference Number: 6.2.2) and in appendix C1-2 (Application Reference Number: 6.3.9). The findings of the gravity modelling are presented in Appendix C-2 in the section titled 'Accommodation and spatial distribution of the workforce'.

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Figure C1-4 Indicative construction workforce profile

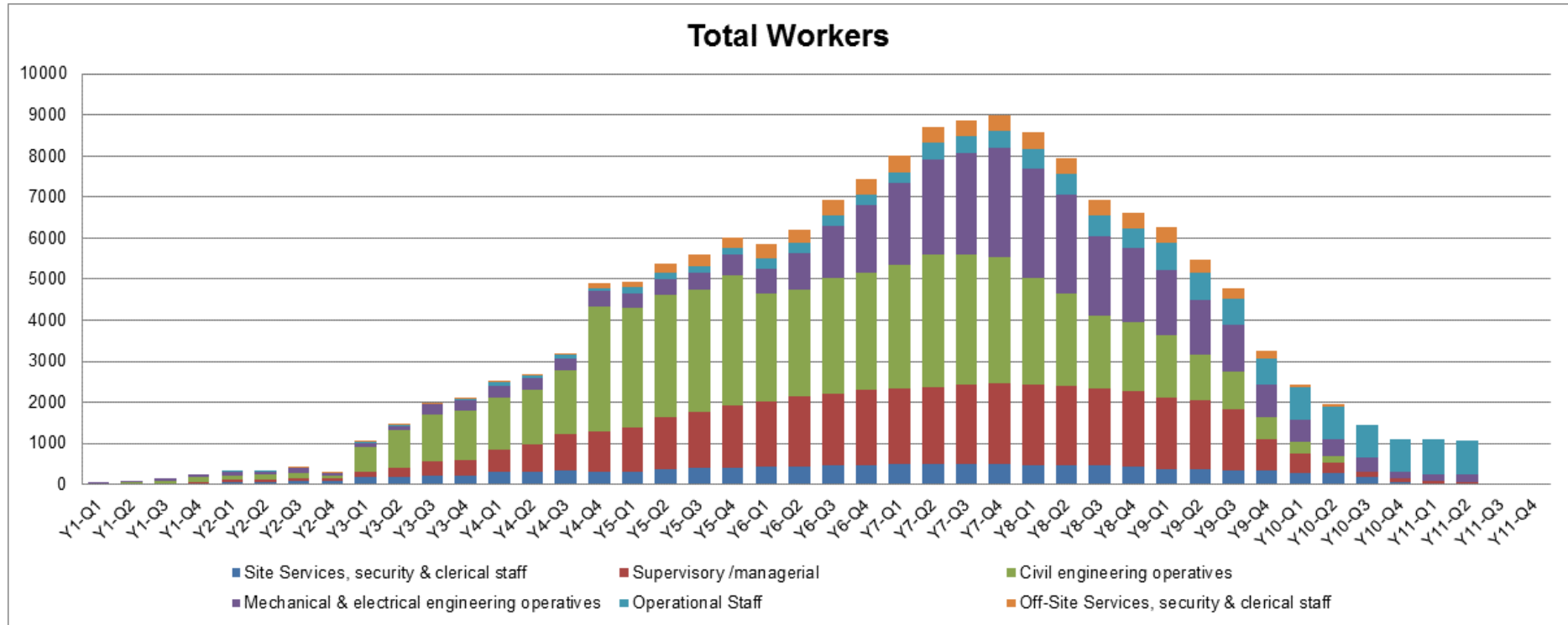
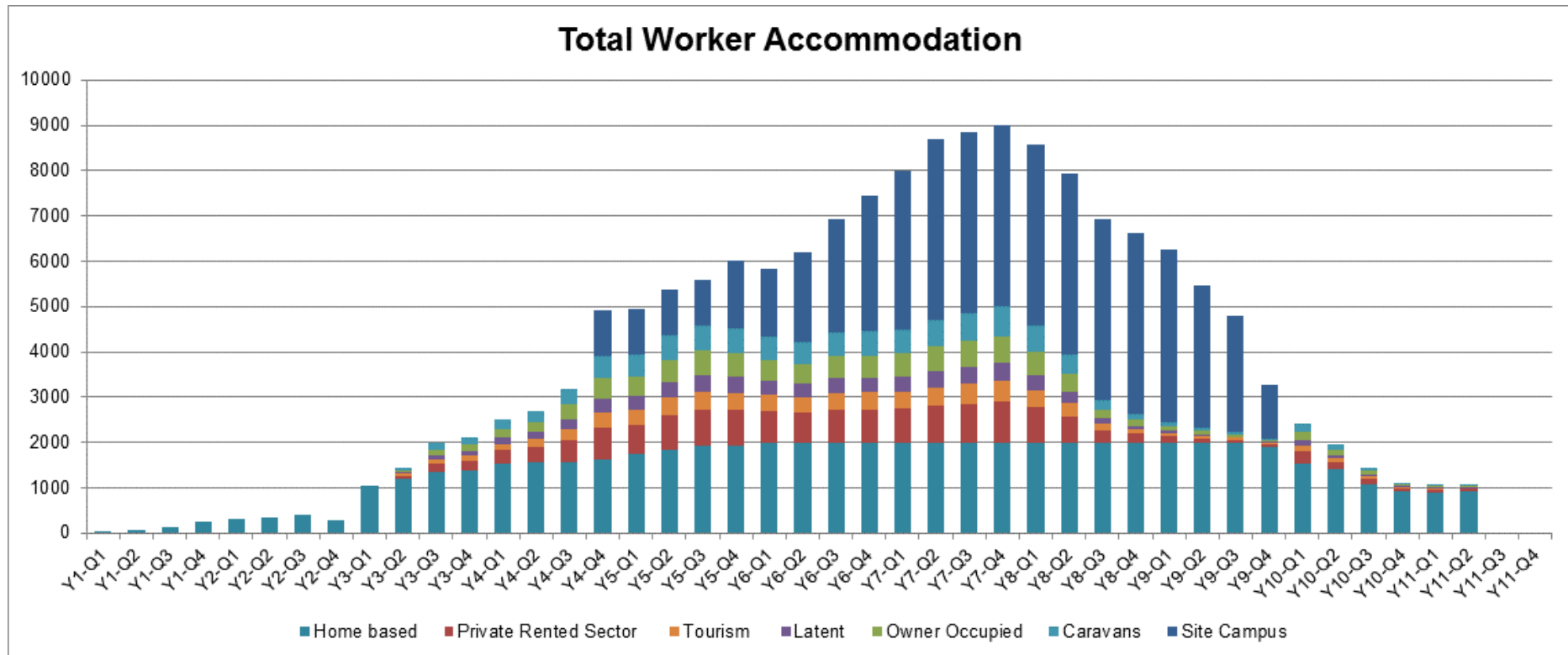


Figure C1-6 Indicative construction workforce accommodation profile



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Embedded mitigation

- 1.4.13 The provision of the Site Campus and the facilities within it, during the construction of the Wylfa Newydd Project, provides embedded mitigation to reduce adverse effects on the local housing market and public service facilities. This is a key aspect of the Workforce Accommodation Strategy (Application Reference Number: 8.4). The potential localised socio-economic effects specific to the Site Campus development and the wider Wylfa Newydd Development Area are assessed within chapter D3 (Application Reference Number: 6.4.3) of this Environmental Statement.
- 1.4.14 In addition, embedded mitigation identified within chapters C2 (traffic and transport) (Application Reference Number: 6.3.2), C3 (public access and recreation effects of traffic) (Application Reference Number: 6.3.3), C4 (air quality effects of traffic) (Application Reference Number: 6.3.4), C5 (noise and vibration effects of traffic) (Application Reference Number: 6.3.5), C6 (Application Reference Number: 6.3.6), and D10 (landscape and visual, Application Reference Number: 6.4.10) provide mitigation of socio-economic effects as it serves to remove or reduce effects on people, be they local residents or visitors. For instance, the provision of the Marine Off-Loading Facility to reduce freight movements by road, the provision of the Logistics Centre and the Park and Ride, along with the dedicated bus services for construction workers, all serve to reduce the potential effects on local communities, businesses and visitors.
- 1.4.15 Furthermore, as secured in the Landscape and Habitat Management Strategy (Application Reference Number: 8.16) and Phasing Strategy (Application Reference Number: 8.29), there will be phased implementation of landscape mounding, seeding of pasture and woodland planting to include early creation of the outer slopes and top of the linear landscaped mound adjacent to Tregle, and landscape mounding on the edge of Cemaes. As secured in the Main Power Station Site sub-Code of Construction Practice (sub-CoCP) (Application Reference Number: 8.7), a diversion of the Wales Coast Path will be provided as a continuous route throughout construction, around the construction fence between Cemlyn Bay and Cemaes. This route will be unsurfaced. Suitable structures across watercourses will be provided, these could take the form of a simple wooden bridge (they are only for walkers). Footpaths already cross these watercourses and structures of a similar scale will be utilised. As a result, access to Porth Wylfa and Porth yr Ogof from the Wales Coast Path will be retained throughout construction.

Good practice mitigation

Jobs and Skills Strategy

- 1.4.16 A number of activities to support the development of the construction workforce in the local area have been outlined within the Jobs and Skills Strategy (Application Reference Number: 8.3). This strategy, while not secured as a requirement of the Development Consent Order (DCO), outlines elements on how Horizon will work with a range of stakeholders including the IACC, the Welsh Government and North Wales Economic Ambition Board members to fund and facilitate the timely delivery of additional training to meet

specific skills needs identified for the Wylfa Newydd Project. The funding to deliver Horizon's commitments within the Jobs and Skills Strategy (Application Reference Number: 8.3) will be secured through planning obligations and will support Horizon in maximising the proportion of home-based workers making up the workforce during construction, which for assessment purposes is estimated to be 2,000 workers. This will promote and enable training in advance of potential employment to facilitate greater local employment opportunities. Details can be found in the Jobs and Skills Strategy (Application Reference Number: 8.3) that is being collaboratively developed with a range of stakeholders.

Supply Chain Charter (and Action Plan)

- 1.4.17 Horizon's Supply Chain Charter (available at www.horizonnuclearpower.com) sets out its commitment to safety, collaboration and engagement, alongside procurement and integrity. It also outlines Horizon's expectation of suppliers, and notes how they will work together for greater beneficial outcomes for all parties.
- 1.4.18 Horizon will continue to work with its Joint Venture Partner, Menter Newydd, to raise awareness of the Wylfa Newydd Project and the business development opportunities that it presents, with the focus on local (Anglesey) and regional (north Wales) businesses. Horizon is developing a Supply Chain Action Plan to support the realisation of the goals set out in the Charter. The Action Plan is being developed jointly with IACC, the North Wales Economic Ambition Board, and the Welsh Government. Along with the Supply Chain Charter, the Supply Chain Action Plan would be secured through the Section 106 Agreement to be entered into between Horizon and the IACC. Terms of references and memorandum of understanding will be developed as part of this process however it is envisaged that Horizon would establish a working group that would encourage cooperation between statutory authorities, stakeholders, project partners and third-party supply-chain providers during the construction period. The Action Plan aims to:
- maximise opportunities within the local area;
 - support a sustainable supply chain;
 - provide sufficient notice of when opportunities arise;
 - simplify supplier registration (one registration for the whole of the project);
 - work collaboratively with statutory authorities;
 - support business readiness;
 - map supply chain;
 - share minimum requirements for undertaking works at Wylfa Newydd;
 - monitor supplier performance (promote good performance);
 - support implementation of Wylfa Newydd Employment and Skills Service (WNESS);
 - focus on long term development opportunities that are sustainable post construction; and

- monitor impact of works outside of the development – displacement.
- 1.4.19 The Supply Chain Service will oversee the delivery and implementation of the Supply Chain Action plan and will be jointly formed of stakeholders and key delivery partners from the Wylfa Newydd supply chain. The Service will be secured through a Section 106 Agreement. Horizon will also continue working with the Supply Chain Service to further enhance and deliver the supply chain readiness programme.
- 1.4.20 Horizon is developing a Supply Chain Portal which will be secured through the Section 106 Agreement to be entered into between Horizon and the IACC. This will be a web based procurement platform that allows interested suppliers to register once for opportunities at the Wylfa Newydd Project, thus simplifying the process also allows the buying identity across the various tiers at Wylfa Newydd to share opportunities arising at the project.
- 1.4.21 The portal will replace the existing supplier registration tool, providing a route for suppliers/potential suppliers to express an interest in the knowledge that Horizon or members of its supply chain will consider all expressions of interest. The procurement platform will provide details of the various types of project activities open for engagement and the minimal expectations that need to be satisfied by an interested supplier (reflecting the 'codes and standards'). Horizon, through the procurement platform, will be able to provide individual feedback to suppliers who have expressed interest.

Code of Construction Practice

- 1.4.22 The Wylfa Newydd CoCP (Application Reference Number: 8.6) and sub-CoCPs (Application Reference Numbers: 8.7 to 8.12) set out the standards and measures of work ensuring compliance with legislation and the effective planning, management and control of construction activities (including working times; security arrangements; supply-chain requirements; travel and logistics; health and welfare; and behavioural expectations) with the aim of controlling adverse effects on the local community and the environment. The Wylfa Newydd CoCP (Application Reference Number: 8.6) sets out project-wide strategies supported by sub-CoCPs (Application Reference Number: 8.7 to 8.12) that provide additional standards and measures specifically relevant to a particular site or location. Compliance with the Wylfa Newydd CoCP (Application Reference Number: 8.6) and sub-CoCPs (Application Reference Number: 8.7 to 8.12) will be secured through a DCO requirement.

Workforce Management Strategy

- 1.4.23 In addition, as a DCO requirement, the Workforce Management Strategy (WMS) (Application Reference Number: 8.5) will set out key principles that Horizon will utilise to prepare a Code of Conduct that will be secured through labour agreements with the supply chain, trade unions and contractors. Therefore, the WMS (Application Reference Number: 8.5) and Code of Conduct will be used to manage and control the workforce required for the construction of the Wylfa Newydd Project. The principles will help deliver the project safely, to budget and on schedule as well as reduce the potential effects of large numbers of temporary construction workers on the local community. Horizon will also ensure the enforcement of the standards and

procedures and will provide support to the community and stakeholders to avoid foreseeable problems and respond and react efficiently and effectively if or when they do arise.

Workforce Accommodation Strategy

- 1.4.24 In collaboration with the WMS (Application Reference Number: 8.5), Horizon has developed a Workforce Accommodation Strategy (Application Reference Number: 8.4) that seeks to ensure that the accommodation offer for the Wylfa Newydd Project is attractive for workers and encourages them to on the project, but also incentivises and guides them to accommodation choices that benefit the local area and avoids adverse impacts on neighbouring communities.
- 1.4.25 The Workforce Accommodation Strategy (Application Reference Number: 8.4) outlines the following provisions and these would be secured through planning obligations and financial contributions:
- Workforce Accommodation Management Service (WAMS);
 - Housing Fund; and
 - Health and Welfare facilities that are available to all workers.
- 1.4.26 The Workforce Accommodation Strategy (Application Reference Number: 8.4) also details any additional provisions that would be necessary in respect to any variation of the accommodation strategy that is different to that which is reported in this chapter (i.e. up to 4,000 of these will be accommodated within the Site Campus; 3,000 are expected to enter existing/new accommodation within the KSA; and an estimated 2,000 are expected to be already residing in the KSA and represent the local workforce).

Health, Welsh Language and Equalities Impact Assessments

- 1.4.27 Mitigation measures outlined as part of the HIA (Application Reference Number: 8.19), Welsh Language Impact Assessment (WLIA) (Application Reference Number: 8.21), and the Equality Impact Assessment (EqIA) (Application Reference Number: 8.22) all serve to reduce potential adverse socio-economic effects of the Wylfa Newydd Project. As the focus of these assessments is on the effects on local people and communities, all aspects of their mitigation are relevant for consideration.
- 1.4.28 Mitigation set out within section J of the HIA (Application Reference Number: 8.19) includes Horizon establishing and chairing an external stakeholder group (Health Monitoring Group) to monitor the implementation of the HIA mitigation measures and provide advice on their delivery. Horizon would appoint a Community Involvement Officer to undertake outreach work, and is committed to providing appropriate Occupational Health and Hygiene services for the construction and operational workforce.
- 1.4.29 Volume B and appendix B4-1 of the WLIA (Application Reference Number: 8.21) outlines that mitigation will include:
- appointment of a Welsh Language and Culture co-ordinator for the workforce;

- focus on issues around education services, welcome packs for families, education resources and apprenticeships;
 - mitigation measures around supporting the integration of incomers, developing capacity in local communities, and supporting community projects; and
 - accountability, with appropriate mechanisms for overseeing the implementation of the mitigation strategy within Horizon and for monitoring progress.
- 1.4.30 Section 7 of the EqIA (Application Reference Number: 8.22) outlines the mitigation measures adopted to reduce the effects of the construction workforce on the community's ability to access community infrastructure and public services, and measures to reduce or eliminate impacts on community cohesion e.g. Workforce Accommodation Strategy (Application Reference Number: 8.4).
- 1.4.31 Mitigation measures in respect to HIA (Application Reference Number: 8.19); WLIA (Application Reference Number: 8.22); and EqIA (Application Reference Number: 8.22) will be secured through specific planning obligations.
- 1.4.32 For more information on good practice mitigation see project-wide effects chapters C2 (Application Reference Number: 6.3.2), C3 (Application Reference Number: 6.3.3), C4 (Application Reference Number: 6.3.4), C5 (Application Reference Number: 6.3.5), and C6 (Application Reference Number: 6.3.6). Also landscape and visual chapters such as D10 (Application Reference Number: 6.4.10) provide information on mitigation measures applicable to specific sites.

Operation

Basis of assessment and assumptions

- 1.4.33 Socio-economic assessment of the Wylfa Newydd Project's effect is based on an estimated workforce of 850 at full operation.
- 1.4.34 The breakdown of the workforce is:
- 25% operations;
 - 25% maintenance;
 - 25% engineering;
 - 10% technical support; and
 - 15% business support and other trades.
- 1.4.35 An additional outage workforce of 1,000 would be required every 18 months, for each Unit. Outages for each Unit will not occur at the same time. These workers will be sourced through the Wylfa Newydd Project supply chain. Works will be carried out in two 12-hour shifts spread over 24 hours per day, seven days per week. Outage periods will last around 25 to 30 days on each occasion. Every 10 years, this would be extended to a 45-day shutdown.

Embedded mitigation

- 1.4.36 No embedded mitigation specifically for socio-economic effects has been identified as being required during operation. However, it should be noted that the embedded mitigation identified within project-wide effects chapters C2 (Application Reference Number: 6.3.2), C3 (Application Reference Number: 6.3.3), C4 (Application Reference Number: 6.3.4), C5 (Application Reference Number: 6.3.5), and C6 (Application Reference Number: 6.3.6) all provide mitigation of socio-economic effects by removing or reducing effects on people – be they local residents or visitors.
- 1.4.37 Landscape and visual chapters such as D10 (Application Reference Number: 6.4.10) provide information on mitigation measures applicable to specific sites. For example, extensive landscaping and planting is proposed within the Landscape and Habitat Management Strategy (Application Reference Number: 8.16) as embedded mitigation in the design of the Wylfa Newydd Development Area. This planting will be maintained and enhanced during operation of the Power Station to mitigate the visual and noise impacts of the Power Station Site with respect to neighbouring sensitive receptors as well as enhancing the landscape and ecological environment surrounding the Power Station as a whole.

Good practice mitigation

- 1.4.38 The Supply Chain Charter discussed above would serve to support ongoing supply chain engagement throughout the operational phase of the Wylfa Newydd Project. The Jobs and Skills Strategy (Application Reference Number: 8.3) serves as good practice mitigation to increase the local contribution of the operational workforce. In addition to the standard entry route to careers in the sector, this is specifically focused on engagement with schools, the long-term unemployed, ex-HM Forces personnel, and a range of training schemes for apprentices and graduates.
- 1.4.39 As above, good practice mitigation serves to remove or reduce impacts on people – be they local residents or visitors. These include the project-wide effects chapters C2 (Application Reference Number: 6.3.2), C3 (Application Reference Number: 6.3.3), C4 (Application Reference Number: 6.3.4), C5 (Application Reference Number: 6.3.5), and C6 (Application Reference Number: 6.3.6). Also landscape and visual chapters such as D10 (Application Reference Number: 6.4.10) provide information on mitigation measures applicable to specific sites. Particularly relevant mitigation includes the following secured through the Wylfa Newydd Code of Operational Practice (CoOP) (Application Reference Number: 8.13).
- Traffic and transport: the Traffic and Transport Strategy within the Wylfa Newydd CoOP (Application Reference Number: 8.13) would include measures to encourage sustainable transport solutions, such as:
 - an Operational Travel Strategy which will reduce environmental effects associated with traffic during the operational phase by encouraging car sharing, advertising of bus services, cycle parking and key walking routes.

- Public access and recreation: regular inspections and maintenance will be carried out on public access infrastructure on land under Horizon's control, in order to allow and ensure the safe and convenient passage of members of the public through and within the Wylfa Newydd Development Area, including the following facilities:
 - a car park at a similar location as the current Ty Croes (Fisherman's car park) and a picnic area with bilingual interpretation boards above Porth yr Ogof, which will be accessible by wheelchair from a car park at a similar location to the existing Fisherman's car park
 - new Public Right of Ways (PRoW) created on re-profiled land outside of the Power Station Main Site, linking to the Wales Coast Path, existing PRoW network and Cemaes;
 - Landscape and visual: established maintenance of all landscaped planting.
 - Air quality: the travel strategy during operational phase is considered to be a good practice mitigation measure and its effect on traffic flows has been included in the traffic data used for the air quality assessment.
- 1.4.40 Mitigation measures outlined as part of the HIA (Application Reference Number: 8.19), the WLIA (Application Reference Number: 8.21), the EqIA (Application Reference Number: 8.22) alongside those outlined in the Wylfa Newydd CoOP (Application Reference Number: 8.13) also serve to reduce effects on local people and communities. The EqIA (Application Reference Number: 8.22) outlines that Horizon will implement an operational travel strategy to encourage sustainable modes of transport, measures to enhance the community's ability to access public open spaces.

Decommissioning

Basis of assessment and assumptions

- 1.4.41 Decommissioning of the first Unit is due to take place around Year 67 based upon an operational period beginning during Year 7. Firm predictions of workforce and associated implications cannot be made by Horizon at this stage.
- 1.4.42 Indications of potential changes in workforce can however be taken from similar projects such as the former Magnox power stations located at Trawsfynydd in Gwynedd, as well as the Existing Power Station at Wylfa Newydd. The decrease in operational workforce during decommissioning would be phased but specific detail on this is currently unavailable.

Embedded mitigation

- 1.4.43 No specific embedded mitigation has been identified as required at this stage. The provision of some form of temporary workers' accommodation could be required and provided.
- 1.4.44 Embedded mitigation delivered as part of the project-wide effects chapters C2 (Application Reference Number: 6.3.2), C3 (Application Reference Number:

6.3.3), C4 (Application Reference Number: 6.3.4), C5 (Application Reference Number: 6.3.5), and C6 (Application Reference Number: 6.3.6) all provide mitigation of socio-economic effects as it serves to remove or reduce effects on people – be they local residents or visitors. Also landscape and visual chapters such as D10 (Application Reference Number: 6.4.10) provide information on mitigation measures applicable to specific sites.

Good practice mitigation

- 1.4.45 Horizon would make efforts to redeploy, retrain and re-skill operational staff in decommissioning roles. Through the implementation of the Supply Chain Action Plan, Service, and Portal (see 1.4.19 for further detail), Horizon would encourage the contractors responsible for decommissioning to use local businesses as much as practicable.
- 1.4.46 Mitigation measures outlined as part of the HIA (Application Reference Number: 8.19) (noted in 1.4.27) to reduce the effects of the Wylfa Newydd Project on local people and communities are expected to be put in place as required during decommissioning and a specific WLIA for Decommissioning would be prepared at the appropriate time. Decommissioning of the Power Station is not considered in the EqIA (Application Reference Number: 8.22), as an assessment would depend upon the characteristics of the population at that time.

1.5 Assessment of effects

- 1.5.1 This section presents the findings of the project-wide assessment of socio-economic effects for the Wylfa Newydd Project. The scope, methodology and policy context for this assessment are outlined in chapter B2 (Application Reference Number: 6.2.2). The following topics are examined in each phase of the Wylfa Newydd Project:
- skills and local labour;
 - accommodation and spatial distribution of the workforce;
 - public services;
 - tourism; and
 - business and supply chain.
- 1.5.2 Supporting information for the assessment is provided within appendix C1-1 (Application Reference Number: 6.3.8) and C1-2 (Application Reference Number: 6.3.9). In addition, considerations of effects on community cohesion are detailed within appendix C1-3 (Application Reference Number: 6.3.10). Community cohesion effects also form part of the considerations presented within the HIA (Application Reference Number: 8.19), WLIA (Application Reference Number: 8.22) and the EqIA (Application Reference Number: 8.22).

Construction

Skills and local labour

- 1.5.3 This section assesses the effects of employing up to 9,000 for the Wylfa Newydd Project within the context of the UK construction sector and local labour market.

Changes to employment in the construction sector

- 1.5.4 It is expected that at peak construction, up to 9,000 workers would be required for the Wylfa Newydd Project. This workforce consists of construction workers, along with facilities management staff and operational staff. Further information about the breakdown of workers is provided in section 1.4. Based on an assessment of the labour market and available skills, an estimated 2,000 of the peak workforce are expected to already reside within the DCCZ and, therefore, are considered to be home-based. The local contribution ranges from 90% for off-site services, security and clerical staff, to 7% for supervisory and managerial staff. Further information on this is provided within technical appendix C1-2 (Application Reference Number: 6.3.9).
- 1.5.5 While it is recognised that not all jobs created by the Wylfa Newydd Project would be in the construction sector, the majority are likely to be. Data from the 2011 Census show that there were approximately 14,400 residents employed in the construction sector in the DCCZ [RD5]. The employment demand of the estimated 2,000 workers from the DCCZ would result in a temporary increase of 14% in construction employment in the DCCZ.
- 1.5.6 For detail on the types of roles that will be created see figure C1-5. Outside of the peak construction period, additional employment opportunities would be provided to local people to work on the construction or operation of the Associated Developments and Off-Site Power Station Facilities. Table C1-8 below shows the local maximum workforce estimated for the construction and operation of these developments alongside that of the overall peak construction. The construction of the Associated Developments precede the overall peak construction period. Employment associated with the operation of these facilities are included here as they fall within the overall construction phase of the Wylfa Newydd Project. Table C1-8 represents maximum labour demand estimates for each of Associated Developments and Off-Site Power Station Facilities. These positions will be required prior to the overall peak construction period for the Wylfa Newydd Project as a whole. 'Operation' jobs are included in this table as they will be required during the main construction phase.

Table C1-8 Maximum labour demand estimates*

Project element	Construction (number of workers)	Operation (number of workers)
A5025 Highway Improvements	211(Off-line)	-
Logistics Centre	50	14

Project element	Construction (number of workers)	Operation (number of workers)
Park and Ride	70	25
Off-site Facilities	85	3 (non-emergency); 58 (emergency)

**excludes operation of the Site Campus as this is included under construction.*

- 1.5.7 Given that the sensitivity of the labour market in the DCCZ is considered to be high, and the magnitude of the local employment opportunities is large, the significance of effects is assessed as major beneficial.
- 1.5.8 The potential adverse local impacts associated with the creation of these positions are also associated with labour churn. Labour churn is a measure of the number of individuals moving in and out of work over a specific period of time. It is recognised that there are concerns amongst stakeholders with regard to high levels of labour churn which could result in some businesses struggling to recruit and retain staff. As increased work opportunities are beneficial from labour market perspectives, and any potential effects from high levels of labour churn would materialise to a specific business as opposed to at the whole economy level, this is considered within the business and supply chain topic assessment presented in this section from paragraph 1.5.101. Further details on proposed additional mitigation can be found in section 1.6 of this chapter.
- 1.5.9 Applying a construction sector employment multiplier of 1.9 to calculate indirect and induced employment¹¹, it is estimated that a further 1,800 jobs, in addition to the estimate of 2,000 mentioned above, would be created in the DCCZ¹² as a result of the direct employment opportunities [RD15].

Changes to employment on Anglesey

- 1.5.10 The gravity model assessment estimates that approximately 1,260 home-based workers are expected to come from Anglesey, making up 63% of the estimated 2,000 expected to be home-based and from within the DCCZ. This assessment is based on a review of the skills available in the area and the Wylfa Newydd Project requirements, alongside consideration of travel expectations. According to the 2011 Census, around 30,400 Anglesey residents were in employment at that time, an increase of 16% on the level identified in the 2001 Census [RD5]. Assuming employment remains at this level, the additional employment created on Anglesey therefore represents an increase of 4% on the island. Given that the sensitivity of the labour market on the island is considered to be high, and the magnitude of this change is large to medium, the significance of effects is assessed as moderate beneficial.

¹¹ Indirect jobs are jobs created by the purchases of goods and services. Induced jobs are created by employees spending their money in the economy.

¹² The sectoral multipliers produced by the Scottish Government are the only available UK-based indirect and induced multipliers available at a sector level.

- 1.5.11 Based on an employment multiplier of 1.9 for the construction sector, the Wylfa Newydd Project would create an additional 1,130 jobs elsewhere in the Anglesey economy [RD15].
- 1.5.12 It should be noted that these direct, indirect and induced positions are not in addition to those detailed in paragraph 1.5.4 but rather presented to provide additional Anglesey-specific information.
- 1.5.13 As noted above, any potential adverse local effects associated with the creation of these positions, such as those related to labour churn, are considered within the business and supply chain topic assessment presented in the section from paragraph 1.5.101.

Accommodation and spatial distribution of the workforce

- 1.5.14 The Wylfa Newydd Project proposes a balanced approach to accommodation that plans for a peak case of up to 9,000 workers in total: up to 4,000 in temporary worker accommodation within the Site Campus, 3,000 are expected to enter existing/new accommodation, and an estimated 2,000 being home-based. Relevant mitigation is outlined in the Workforce Accommodation Strategy (Application Reference Number: 8.4).
- 1.5.15 This section assesses the supply and demand for accommodation, of various tenures, in different areas of the KSA. The employment benefits resulting from increased accommodation demand are assessed in the skills and local labour section (see paragraph 1.3.3) via indirect and induced effects; the tourism section (see paragraph 1.5.82) assesses the effects of the project on tourism accommodation providers; and the business and supply chain section (see paragraph 1.5.101) assesses the effects of the Wylfa Newydd Project in terms of local expenditure.

Availability of all bed spaces within the KSA

- 1.5.16 Individual categories of accommodation are discussed below. The gravity model allocates non-home-based workers to individual categories of accommodation based on an assumed percentage of the accommodation stock within the KSA (further information is provided in technical appendix C1-2, Application Reference Number: 6.3.9), on the accommodation and spatial distribution of the workforce. In each case, the assessment is based on the available capacity or headroom. This is the stock that has been identified as available for use by workers. It is expected that the future baseline would provide a greater availability of accommodation to workers, as providers respond to the potential increase in demand generated by the Wylfa Newydd Project. This is in line with the JLDP which plans for higher rates of housing growth to support increased demand due to the projects identified within the Isle of Anglesey County Council's Energy Island Programme [RD8].
- 1.5.17 Table C1-9 shows the available capacity of, and demand for, the overall accommodation headroom by KSA sub area. There are approximately 6,440 bed spaces available for non-home-based workers across the KSA, in addition to 3,275 caravan and camping bed spaces. It should be highlighted that available bed spaces are those that are affordable to workers and not used by others, therefore available bed spaces is a smaller figure than overall bed

spaces in the KSA. Further information on how these estimates were generated is provided in the technical appendix C1-2 (Application Reference Number: 6.3.9).

- 1.5.18 The demand for bed spaces is estimated to be approximately 2,350 and demand for caravan and camping bed spaces is estimated to be approximately 650. Therefore, at a KSA level, demand for bed spaces created by temporary workers would not exceed supply. This is the demand that is expected to be accommodated within the existing accommodation available within the KSA.
- 1.5.19 Table C1-9 also demonstrates the potential sub area level constraints that exist between the supply and demand. The management of capacity and demand of accommodation across Anglesey will be addressed in the Workforce Accommodation Strategy (Application Reference Number: 8.4) (discussed in section 1.6). These are considered further in the stock specific discussions that follow below.

Table C1-9 KSA sub area supply and demand - total accommodation headroom - bed spaces

Area	All accommodation (excluding caravans and camping)		Caravan and camping accommodation	
	Headroom	Demand	Headroom	Demand
Anglesey North	604	746	502	278
Anglesey South	1,495	432	991	201
Anglesey West	1,677	776	457	115
Menai Mainland	2,666	396	1,323	55
Total*	6,440	2,350	3,275	650

**Figures are rounded so may not total*

- 1.5.20 Given the potential increased demand for accommodation and resulting pressure on prices in some local areas, the sensitivity of the housing market in the DCCZ is considered to be high, and the magnitude of change in overall demand (within the context of the available headroom) is small. The overall potential effect on availability of accommodation is assessed as minor adverse, therefore not significant. See section 1.6 for further details on the ranges of additional mitigation measures proposed to support the accommodation sector within the KSA.
- 1.5.21 If less than the estimated 2,000 home-based workers are employed, this would mean that there are more non-home-based workers requiring accommodation. This scenario, or others, could see the demand from temporary construction workers exceeding the supply within certain accommodation stock types. However, given that the accommodation

baseline at peak construction is likely to include greater availability in line with housing growth identified within the JLDP [RD8], developers would anticipate and respond to the demand created by the Wylfa Newydd Project in accordance with the Workforce Accommodation Strategy (Application Reference Number: 8.4). It is not expected, therefore, that an adverse effect on certain accommodation stock types would materialise. With any forecast or estimate uncertainty is to be expected, and to provide for this, the Workforce Accommodation Strategy (Application Reference Number: 8.4) plans for 9,000 workers at peak, including an accommodation service to guide workers and support the provision of additional housing stock in line with the needs of the Wylfa Newydd Project. To further ease pressure that may materialise on housing supply, a Housing Fund would be created to increase the housing stock (for example, by supporting new-build permanent housing) and support the IACC in housing schemes/enforcement, see paragraph 1.6.8 within the 'Additional Mitigation' section for further detail.

- 1.5.22 Concerns have been raised locally about the potential for construction workers to stay on Anglesey or in the KSA after the construction comes to an end, thereby creating increased or longer-term pressure on accommodation stocks. However, it can be noted that a survey carried out for Sizewell B Nuclear Development showed that none of the non-home-based workers had remained within Suffolk and Norfolk after their employment at Sizewell B had ended [RD16]. This, in addition to the expected wider demand within the nuclear sector as a result of the New Nuclear Build programme and associated infrastructure such as the proposed Geological Disposal Facility, would suggest that there is unlikely to be a substantial demand from non-home-based workers for accommodation once the construction of the Wylfa Newydd Project is completed. As noted above, the population projections and housing demand figures outlined in the JLDP include for the growth created by the Wylfa Newydd Project.

Availability of bed spaces within the tourism stock in the KSA

- 1.5.23 The capacity and demand for tourism bed spaces (those provided in hotels, guest houses, bed and breakfasts and self-catering accommodation) and caravans and camping bed spaces by KSA sub area is shown in table C1-10. The assessment of caravan and camping bed spaces is presented separately in the table, in order to avoid masking the potential effects within the other tourism bed-stocks.
- 1.5.24 An estimated 450 bed spaces would be expected to come from the tourist accommodation stock at peak construction. There is not expected to be a significant effect on the availability of tourism accommodation within the KSA, as it is estimated that there are approximately 3,100 available bed spaces in this stock (table C1-10). The demand from workers for these bed spaces is short-term and temporary. The estimates of headroom are based on the available capacity above that used by tourists and visitors in the August peak of the tourism season. At other times of the year and at other times in the construction programme, the demand for bed spaces in this stock is considered to be beneficial for the sector. The potential revenues created by this demand are discussed in the section from paragraph 1.5.82 below.

Further information on how the capacity estimates were generated is provided in the appendix C1-2 (Application Reference Number: 6.3.9).

- 1.5.25 Based on an estimated 650 bed spaces required from the caravan and camping accommodation stock at peak construction and the available supply of around 3,275 bed spaces, there is not expected to be a significant effect on availability. However, it is worth noting that licensing and planning restrictions exist on many caravan and camping sites to limit year-round occupancy, so the actual number of available bed spaces may be slightly lower. The JLDP contains a provision for licence restrictions to be amended to provide accommodation of workers in certain circumstances.
- 1.5.26 It is estimated that the majority of the demand for tourism accommodation (291 bed spaces) would be in Anglesey North and Anglesey West. As the available capacity in these areas is estimated to be approximately 1,136 bed spaces, no adverse effects on availability are predicted. Nonetheless, it is recognised that uncontrolled access to this stock could create some localised effects. Based on this uncertainty and the sensitivity of this stock, the potential effect is assessed as minor adverse, therefore not significant.
- 1.5.27 It is estimated that the majority of the demand for camping and caravan accommodation (393 bed spaces) would be in Anglesey North and Anglesey West. As the available capacity in these areas is estimated to be approximately 959 bed spaces, no adverse effects on availability are predicted.

Table C1-10 KSA sub area supply and demand – tourism accommodation headroom – bed spaces

Area	Tourism accommodation		Caravan and camping accommodation	
	Headroom	Demand	Headroom	Demand
Anglesey North	200	90	502	278
Anglesey South	559	72	991	201
Anglesey West	936	201	457	115
Menai Mainland	1,407	87	1,323	55
Total*	3,101	450	3,275	650

*Note totals may not sum exactly due to rounding

- 1.5.28 As noted above, the construction worker demand is likely to provide a major benefit for tourism accommodation providers, taking up some under-utilised spare bed space capacity, especially in the off-season months. The economic benefits of this are discussed in the tourism sections of this chapter (see paragraphs from 1.5.81).
- 1.5.29 Section 1.6 provides details of the additional mitigation measures which Horizon will put in place to avoid or reduce any potential localised effects arising from worker demand.

Availability of bed spaces within the private rented sector in the KSA

- 1.5.30 The capacity and demand for bed spaces within the private rented sector (PRS) by KSA subdivision is shown in table C1-11.
- 1.5.31 The number of available bed spaces within the PRS is estimated to be approximately 1,650, based on how the market currently operates locally. Further detail on how this was estimated is provided in appendix C1-2 (Application Reference Number: 6.3.9). It is estimated that approximately one third of the non-home-based workforce seeking accommodation within the KSA (approximately 900) would seek to move into private rented accommodation. Based on this level of demand, and the known current concerns locally about the availability in this stock, it is possible that effects on availability within this stock may be experienced locally.
- 1.5.32 This assessment has considered a worst case scenario and it is likely that the capacity across the whole study is underestimated by the approach applied here. This is because the assessment is based on turnover estimates which have been constrained by available capacity in Gwynedd. In addition, there is likely to have been growth of the sector since 2011 and further planned growth as outlined in the JLDP [RD8]. This capacity is heavily constrained by the resident student population in Bangor and therefore suggests a higher than average turnover in the whole stock. See chapter B2 (Application Reference Number: 6.2.2) and appendix C1-2 (Application Reference Number: 6.3.9) for more detail on the approach used to estimate this capacity.
- 1.5.33 This general conclusion also masks potential issues at a sub area level within the KSA. The expected demand for accommodation would be greatest in Anglesey North and Anglesey West (513 bed spaces) where the available capacity of approximately 457 bed spaces is insufficient.

Table C1-11 KSA sub area supply and demand – PRS accommodation headroom – bed spaces

Area	Headroom	Demand
Anglesey North	145	239
Anglesey South	354	161
Anglesey West	312	274
Menai Mainland	837	226
Total	1,649	900

- 1.5.34 In addition, there is the potential for demand in this sector to push up prices and adversely affect those currently renting or trying to access PRS accommodation. This could result in additional pressure being placed on the social housing stock in the area or people having to move out of the area to access suitable private rented accommodation.
- 1.5.35 Based on the possibility of demand exceeding supply in certain areas and the potential for the overall demand to affect prices within the sector, the potential effect is assessed as moderate adverse, and therefore significant. This also has the potential to adversely affect the use of the Welsh language within the KSA if local Welsh-speaking residents become priced out of the market. For

further detail on the impacts on Welsh language and culture, see the WLIA (Application Reference Number: 8.21).

- 1.5.36 Section 1.6 provides details of the additional mitigation measures which Horizon will put in place to monitor and manage the use of stock and to support the provision of additional housing locally.

Availability of bed spaces within the owner-occupied stock in the KSA

- 1.5.37 The current turnover in this market suggests that the capacity of this stock is around 950 bed spaces for workers. The approach applied to estimate this capacity is outlined in appendix C1-2 (Application Reference Number: 6.3.9). This is equivalent to 950 houses as it is assumed that an owner-occupied unit is likely to be occupied by a single worker plus dependants. It is estimated that approximately 600 workers seeking accommodation within the KSA would move into owner-occupied accommodation. It could be envisaged that this demand would materialise over a period of time, for instance in the five years preceding the peak, in which case demand would be for around 120 units per year. Based on this level of demand and the fact that the JLDP is increasing its housing targets to an employment-led target to take account of growth expected to be delivered through the Energy Island Programme, no direct effect on availability would be expected. In addition, it should be noted that the JLDP has identified a demographic need which varies by location but is in the region of 64 dwellings per year on Anglesey. Welsh Government household projections suggest this need is around 50. The employment-led target on Anglesey is 254 dwellings per year (increased to 301 to account for under-delivery in the last five years). As the expected demand is already planned, no significant additional effect is identified.
- 1.5.38 Potential changes in the availability of housing in this stock could give rise to effects on Welsh language and culture within the KSA, including affecting the balance of Welsh and English speakers within the KSA. Further detail is provided within the WLIA (Application Reference Number: 8.21), specifically within table B-10 which notes that construction workers who choose to remain in the KSA, and up to 15% of operational workers likely to be from outside the KSA, would be unlikely to be Welsh-speakers and would therefore create residual effects on the percentage of Welsh speakers in the KSA.
- 1.5.39 It is recognised that the gravity modelling has identified potential KSA sub area level constraints (table C1-12) in this stock. While there is potential for the overall demand to affect prices within the sector, the fact that a) the increased demand is already factored into the JLDP and b) the demand would be spread over a number of years, means the potential effect is assessed as minor adverse, therefore not significant [RD8].

Table C1-12 KSA sub area supply and demand – owner-occupied accommodation headroom – bed spaces

Area	Headroom	Demand
Anglesey North	106	235
Anglesey South	250	116
Anglesey West	171	166

Area	Headroom	Demand
Menai Mainland	422	83
Total	949	600

Availability of bed spaces within the latent stock in the KSA

- 1.5.40 Analysis of responses to a Housing Market Assessment¹³ on Anglesey suggests that around 743 bed spaces might be available for workers in this stock. These are bed spaces not captured in other stock types and mainly consist of rooms rented out in private properties. Such a capacity could provide additional bed spaces to house some of the remaining non-home-based workers. It is expected that this figure may increase closer to the time of construction as the opportunities presented by the Wylfa Newydd Project become more detailed and tangible to local communities. This is consistent with the position witnessed during the construction of Hinkley Point C.
- 1.5.41 As observed in table C1-13, there is a surplus of stock in Anglesey West that could accommodate the small overflow of demand from Anglesey North and other accommodation stock demands. In reality, workers can only use the supply that is brought forward and as noted above, that supply is expected to increase over time. It is expected that the demand will have no significant adverse effects.

Table C1-13 KSA sub area supply and demand – latent accommodation headroom – bed spaces

Area	Headroom	Demand
Anglesey North	153	182
Anglesey South	332	83
Anglesey West	258	135
Menai Mainland	0	0
Total	743	400

- 1.5.42 The HIA (Application Reference Number: 8.19) also considers effects on housing during the construction phase. The assessment discusses the opportunity for improvements in health and well-being from greater use of latent housing stock by the non-home-based construction workforce. It notes that Horizon’s support for the use of latent housing stock could result in a moderate positive effect to health and well-being.
- 1.5.43 In addition, the creation of this demand would create a positive economic effect through the additional income which would be generated for households.
- 1.5.44 Please refer back to table C1-9 for an overview of bed spaces for all accommodation tenures.

¹³ Isle of Anglesey Local Housing Market Assessment dataset 2016 update triangulated against 2011 Census data.

Public services

- 1.5.45 This section presents the findings of the assessment of effects on public services. This assessment covers the effects on public services associated with the use of the Site Campus, along with the effects of other non-home-based workers and their dependants. It excludes home-based workers.
- 1.5.46 This assessment covers the potential effects on:
- education - demand for primary and secondary school places;
 - policing services;
 - fire and rescue services; and
 - leisure and community facilities.
- 1.5.47 The potential effects on GPs, dentists and other medical services including ambulance services are assessed within the HIA (Application Reference Number: 8.19).
- 1.5.48 The assessment presented below is informed by the non-home-based population and the additional population which could reasonably be expected to arrive with workers. The breakdown of the additional population during main construction is shown in table C1-14. This is calculated based on benchmarking information that 25% of non-home-based professional workers, 4% of operatives (for example civils; and mechanical and electrical workers) and 60% of operational workers (arriving during construction) would bring families into the area. The average family composition data of these types of workers were used to determine the average number (based on English and Welsh data) of partners and dependants. A more detailed description of these assumptions and the approach is provided in chapter B2 (Application Reference Number: 6.2.2). These figures represent the worst case and are used throughout the public services assessment.

Table C1-14 Breakdown of non-home-based workers and dependants during peak construction

Additional population	Number of people
Non-home-based workers	7,000
Estimated partners	285
Estimated dependants	220
Total	7,505

- 1.5.49 As stated in the employment section of appendix C1-1 (Application Reference Number: 6.3.8), the population projections commissioned by IACC factor in the potential population impacts of the Energy Island Programme, including the Wylfa Newydd Project.

Demand for primary school places

- 1.5.50 Across the KSA as a whole, there are approximately 1,657 available primary school places in 87 primary schools¹⁴ [RD17]. At peak, it is estimated that workers would bring 285 partners and 220 dependants. These dependants would add to the primary school population and under a worst case scenario it is assumed that all would be of primary school age. This is unlikely to be the case.
- 1.5.51 If this were the case, the additional demand would mean that enrolment numbers would increase to 88% of total capacity from the current position of 86%; i.e. a 2% increase in demand leaving a 12% surplus capacity remaining.
- 1.5.52 While primary school capacity across the KSA as a whole is sufficient to accommodate the forecasted numbers of dependants of non-home-based workers, it is recognised that there are areas where demand may result in capacity constraints (table C1-15). Dependants have been distributed across KSA sub areas in line with the distribution of non-home-based workers estimated through the gravity modelling.

Table C1-15 Primary school capacity (%) assessment

Area	% of capacity used currently	Spare places currently	Revised % of capacity used -reflecting new demand
Anglesey North	83.2	189	89.8
Anglesey South	86.7	353	88.3
Anglesey West	94.4	152	96.8
Menai Mainland	82.5	966	83.1
KSA	86.1	1,657	88.0

- 1.5.53 As observed in the baseline section, paragraph 1.3.14, IACC are currently implementing a modernisation programme for schools and they expect it to decrease capacity in some areas. However, the predicted capacity (288 as of 2021) is still sufficient to accommodate the maximum 220 new dependants predicted to be introduced to the area as a result of the Wylfa Newydd Project. This maximum number of dependants would only occur in the unlikely event that all children are of primary school age.
- 1.5.54 While it is recognised that the baseline in terms of spare school places will reduce in the coming years, the fact that it is highly unlikely that all dependants would be of primary school age, and that there is still expected to be an excess of places overall, means no significant effect is identified.
- 1.5.55 It should be noted that the JLDP has planned for growth of the housing provision [RD18]. In addition, the standard planning process for house

¹⁴ It is recognised that following changes to school numbers took place on November 2017: Ysgol Llanfachraeth, Ysgol Ffrwd Win and Ysgol Cylch Y Garn were merged to form a new primary school - Ysgol Rhyd Y Llan - in Llanfaethlu. Ysgol Y Parc, Ysgol Llaingoch and Ysgol Parch Thomas Ellis are to close on 31st August 2017, with the pupils transferring to Ysgol Cybi in November 2017.

building would cover the costs associated with the provision of school places. There is therefore normally no requirement for employers to provide funding for additional school places.

- 1.5.56 That said, the local concerns with regards impacts on schools are recognised. The WLIA (Application Reference Number: 8.21) identifies mitigation measures including the provision of language support for new pupils. See section 1.6 for further additional mitigation linked to socio-economic related concerns.
- 1.5.57 The presence of school children from different cultural backgrounds could have an effect on Welsh language and culture. The introduction of approximately 220 school-aged children, the majority of whom are assumed to be non-Welsh speakers, has the potential to alter the balance of the Welsh and non-Welsh speakers within primary schools across the KSA. This is considered further within the WLIA (Application Reference Number: 8.21).
- 1.5.58 In addition to the effect of the Wylfa Newydd Project on primary schools, the effect on Welsh language immersion centres is also of particular relevance. These immersion centres provide intensive Welsh courses for non-Welsh speakers to enable them to integrate into a bilingual society and participate fully in bilingual education. The primary immersion centres on Anglesey currently have an annual capacity for 90 pupils and already operate at full capacity [RD17]. An additional 220 school-aged children at peak would increase the demand for primary immersion centre places well beyond their currently oversubscribed capacity. This is considered further within the WLIA (Application Reference Number: 8.21).

Demand for secondary school places

- 1.5.59 There are approximately 2,500 available secondary school places across the KSA in 11 schools [RD17].
- 1.5.60 Taking a worst case view that all the dependants would be of secondary school age, the potential increased demand for school places (220) would not place constraints on secondary school capacity at a KSA level. The additional demand would mean that enrolment numbers increase to 78% of total capacity, from 76% currently (a 22% surplus capacity would remain). Therefore, the effects are assessed as not significant.
- 1.5.61 No concerns exist in relation to secondary school places at a KSA sub area level (table C1-16).

Table C1-16 Secondary school capacity (%) assessment

Area	% of capacity used currently	Spare places currently	Revised % of capacity used - reflecting new demand
Anglesey North	52.5	461	60.1
Anglesey South	84.5	337	86.5
Anglesey West	74.6	514	77.8
Menai Mainland	77.8	1,199	78.4

Area	% of capacity used currently	Spare places currently	Revised % of capacity used - reflecting new demand
Total	76.2	2,511	78.3

1.5.62 As noted in paragraphs 1.5.57 and 1.5.58, the potential effect of these additional pupils on Welsh language and culture in secondary schools is an important consideration. This is considered further within the WLIA (Application Reference Number: 8.21).

Demand for policing services

1.5.63 As noted in table C1-14, at peak construction there could be an additional population of around 7,500 in the KSA, including non-home-based workers, partners and dependants. Of this additional population, around 93% are expected to seek accommodation on Anglesey, with the remaining 7% seeking accommodation in Menai Mainland. This additional population of approximately 7,000 on Anglesey is equivalent to 10% of the population in 2011, whilst the figure for Menai Mainland (approximately 500) is equivalent to 0.4% of the 2011 population of Gwynedd.

1.5.64 If it is assumed that a rise in population would give rise to a commensurate increase in crime at existing crime rates, then it is possible that the additional population within the KSA could result in a 0.5% increase in the number of incidents in the north Wales constabulary area. This is equivalent to a potential additional 258 incidents per year on Anglesey and 20 incidents per year in Gwynedd.

1.5.65 This assumes that all additional workers are present in the area on a full-time basis, which is not expected to be the case, as they would work a staggered shift pattern of 11 days on and three days off. Where non-home-based workers remain during their days off they will be required to comply with the Code of Conduct (see Workforce Management Strategy, Application Reference Number: 8.5). Also it is worth noting that embedded mitigation such as the Site Campus will provide facilities for up to 4,000 workers (leisure and recreational amenities, retail and convenience stores, a bar and medical services), thereby increasing the ability to manage these workers and reducing the risk of them committing or being victims of crime.

1.5.66 This is considered a negligible impact and therefore no significant effect is expected as a result of potential increases in crime rates.

1.5.67 The scope of this assessment is based on the increase in population, and not on policing needs related to the construction of the nuclear power station such as dealing with, for example, political protests. It is assumed that any such considerations would be covered by general policing or picked up as part of the service planning (outlined in section 1.6)

1.5.68 It is however recognised that the Wylfa Newydd Project is likely to create demand on the north Wales police service. It is also recognised that risks are perceived at community level regarding potential negative impacts on community safety. See section 1.6 for details of the measures that would be put in place to mitigate any such potential effects.

Demand for ambulance service

- 1.5.69 As noted in table C1-14, the additional population during the peak construction period is expected to be around 7,500 on Anglesey (non-home-based workers, partners and dependants). In the 12 months to September 2015, there were 10,251 calls to the ambulance service from Anglesey, equivalent to around 0.15 calls per resident. Assuming any additional calls to the ambulance service are proportional to the increase in population, there are expected to be, approximately, an additional 1,020 calls per year. This is equivalent to an increase of approximately 10% in the number of calls to the ambulance service from Anglesey. As only 50% of the emergency calls from Anglesey are currently answered within the target of eight minutes, it is assumed that the service is already under pressure.
- 1.5.70 The potential increase in the number of calls from Anglesey-based residents is considered a change of medium magnitude.
- 1.5.71 However, there would be provision of emergency health care at WYDA Development, including an on-site ambulance. The HIA (Application Reference Number: 8.19) notes that when the on-site team, using the facilities provided on-site, is not able to treat people the construction workforce would also be expected to use the National Health Service's ambulances and Accident and Emergency hospital services. There will also be funding to provide emergency services with access to funding to offset additional costs resulting from the Wylfa Newydd Project workforce (secured through planning/Section 106 Obligations). The potential effects are therefore considered to be of minor significance.
- 1.5.72 The effect in Gwynedd is assessed as not significant given that the increase in the population is expected to be 0.5% and the embedded mitigation noted above. The effects in Gwynedd are further addressed in the HIA (Application Reference Number: 8.19).
- 1.5.73 Consideration of service planning outcomes is presented in section 1.6.

Demand for fire and rescue services

- 1.5.74 Table C1-14 shows the breakdown of the increase in population during peak construction. Data for the number of incidents attended by the Fire and Rescue Service in Wales are only available for north Wales and not the Isle of Anglesey; between 2015 and 2016, there were 4,865 incidents attended by the North Wales Fire and Rescue Service (NWFRS), equivalent to 0.007 per resident. Assuming the increase in incidents attended by the NWFRS is proportional to the additional population, there are expected to be 53 more incidents attended by the NWFRS as a result of the increase in population during peak construction. This is equivalent to a 1.1% increase in the number of incidents in north Wales.
- 1.5.75 Given this magnitude of change and the provision of facilities on-site and at all off-site locations, the effect is assessed as negligible across the impact area of the NWFRS. If assessed at a more local scale, the impact may be considered to be of medium magnitude given the reliance on volunteers in the

Fire Service on Anglesey, although the magnitude of the impact depends on the flexibility of the fire service across north Wales.

- 1.5.76 Overall, the effect is considered to be minor for the area of the NWFRS and therefore not significant. However, it is not possible to assess the significance of the effect for Anglesey alone.
- 1.5.77 It is recognised that the Wylfa Newydd Project is likely to create demand on the NWFRS outside that which is shown by the metric here. For instance, concerns have been raised around the potential for the use of PRS and latent accommodation by workers to create additional fire risk. Concerns have also been raised locally about the ability of services to respond to any additional risks due to the proportion of volunteers within the Fire Service on Anglesey and the possibility of their free time being occupied by employment related to the Wylfa Newydd Project. This concern is being addressed via the WNESS that will work with organisations to help fill vacancies. See section 1.6 for further details on how Horizon propose to address these concerns.

Demand for leisure and community use facilities

- 1.5.78 Table 6-6 in the baseline appendix C1-1 (Application Reference Number: 6.3.8) shows the number of participants, or visits, to leisure centres by KSA sub area and table C1-14 shows the breakdown of the increase in population during peak construction. Based on a worst case, the increased population could result in an increase in visits of 11% over current visit levels on Anglesey. It should however be noted that leisure facilities will be provided at the Site Campus for workers residing there and available to workers living elsewhere in the KSA.
- 1.5.79 Overall, as a result of the provision of facilities in the Site Campus and taking into account the available usage level information, the effect is considered to be of minor significance. Given the potential distribution of workers based on the gravity modelling results, demand may be expected to be more concentrated in Anglesey North and Anglesey West.
- 1.5.80 It is recognised that current usage levels are higher in Gwynedd and that some increased demand may also be realised from non-home-based workers residing there. See section 1.6 for further details on how Horizon propose to mitigate effects of significant additional demand that is not already funded through existing mechanisms such as council tax.

Tourism

- 1.5.81 This section presents the findings of the assessment of effects on tourism on Anglesey and across the KSA as appropriate. Further information on the indirect and induced effects of expenditure, beyond solely tourism accommodation related expenditure, can be found in the Business and supply chain section from paragraph 1.5.101 onwards. Labour churn is also discussed within that section.

Revenue to tourism accommodation providers

- 1.5.82 During the peak construction period, it is estimated that up to 450 tourism bed spaces across the KSA could be occupied by workers, within hotels and bed

and breakfast accommodation, and a further 650 bed spaces within caravan and camping accommodation at registered sites (paragraph 1.5.24 and 1.5.25). Based on a possible occupancy rate of 80% over one year and a daily allowance provided to workers of £38.41 (2017) per night, the additional revenue to tourism providers within the KSA is estimated to be approximately £12 million per year at peak [RD19].

- 1.5.83 Table C1-17 shows that the demand for the majority of bed spaces would be on Anglesey. The majority of the additional revenue to tourism providers (£10.5 million per year at peak) would be realised on Anglesey as opposed to elsewhere in the KSA. Scarborough Tourism Economic Activity Model (STEAM) tourism data showed tourist expenditure of £83.8 million on accommodation, food and drink in 2015 on Anglesey (see table 7-4 in appendix C1-1, Application Reference Number: 6.3.8) [RD12]. Therefore, this increased expenditure represents a growth of 13% over baseline levels in a peak year. It should be noted that total bed space demand within this sector is expected to be above 400 bed spaces for approximately three and a half years (see figure C1-6).
- 1.5.84 An increase of 13% over baseline levels of tourist expenditure on accommodation, food and drink is approximately equivalent to the total expenditure growth between 2007 and 2014. Given this magnitude of change, and the high value of the tourism sector, the potential effect is considered to be moderate beneficial, therefore significant.

Table C1-17 Revenue to tourism accommodation providers and bed space demand by KSA sub area

Area	Tourism accommodation		Caravan and camping accommodation		Total	
	Demand (bed spaces)	Revenue (£m)	Demand (bed spaces)	Revenue (£m)	Demand (bed spaces)	Revenue (£m)
Anglesey North	90	1.0	278	3.1	368	4.0
Anglesey South	72	0.8	201	2.2	273	3.0
Anglesey West	201	2.2	115	1.3	316	3.5
Menai Mainland	87	1.0	55	0.6	142	1.6
Total*	450	4.9	650	7.1	1,100	12.1

*Figures may not sum due to rounding

- 1.5.85 The additional revenue to tourism providers could also be considered in terms of the number of jobs supported. Whilst this is not an additional benefit, it provides a different way to assess the value of the potential additional revenue.
- 1.5.86 Additional expenditure of just over £12 million per year at peak represents the provision or safeguarding of up to 571 jobs in that year. These estimates are based on a £21,167 'spend per employment' figure for the accommodation sector [RD20]. This represents 4% of the employment within the accommodation and food services sector in the DCCZ (13,953 residents employed).
- 1.5.87 Using the employment multiplier of 1.3 for the accommodation sector, it is estimated that a further 146 jobs could be created in the wider economy in the DCCZ [RD15].

Overall quality of tourist accommodation

- 1.5.88 There is a risk that the quality of existing tourism accommodation may be adversely impacted following completion of the construction of the Power Station. It is recognised that this could result from very high occupancy levels over a prolonged period of time, which may mean maintenance is not able to be kept up. Workers may have lower expectations for accommodation and services than tourists, which may mean that tourism providers respond by providing lower quality accommodation or ultimately maintaining their accommodation less.
- 1.5.89 Such effects have been witnessed historically, after major construction projects or the loss of long-term demand, for instance in Dunbar, Scotland, following the construction of Torness Nuclear Power Station which began

construction in 1980 and ended in 1988. Further information about this benchmarking assessment is provided within the tourism section of the technical appendix C1-2 (Application Reference Number: 6.3.9). However, given the available capacity in this stock throughout the year (3,101 bed spaces compared to 450 workers, see table C1-10) and the fact that workers would not stay in the top-end accommodation due to price restrictions, no such effects are envisaged. The WAMS will also support tourist accommodation providers in offering a proportion of their bed spaces to workers and allowing for the rotation of workers using certain providers.

- 1.5.90 Based on the above, no significant effects are expected. See section 1.6 for further details on how proposed measures would seek to mitigate any such effects should they manifest.

Visitor numbers as a result of construction

- 1.5.91 Visitor behaviour may change in response to the construction of the Power Station. These changes may include visitors choosing to undertake different activities while on Anglesey, staying for shorter periods of time, reducing the likelihood of repeat visits, or choosing not to visit at all.
- 1.5.92 A visitor behaviour survey was carried out in the summer of 2015. Almost 90% of the respondents indicated that construction would have no effect on their likelihood of returning to Anglesey, whilst 1% of respondents indicated that they would be more likely to return, and 9% reported it would deter them from returning to the island during construction. Evidence suggests that although 9% may be less likely to return, this does not mean that all 9% would not return. Respondents noted concerns relating to traffic issues, alongside general disruptions during construction. As noted in chapter C2 (Application Reference Number: 6.3.2) for a short period, significant effects are expected on local road networks during the construction of A5025 Highway Improvements before the bypasses are in place; however, afterwards no significant effects are expected.
- 1.5.93 Based on a review of the detailed responses and relevant embedded mitigation included within chapters C2 (Application Reference Number: 6.3.2) and C3 (Application Reference Number: 6.3.3), it is expected that the actual number of tourism visits that may be lost during construction is likely to be small. However, it is recognised that there could be a potentially significant loss in tourism revenue as a result of a small reduction in visitor numbers given the size of this sector locally. This could be countered by significant on-island expenditure by workers in the food and beverage, general retail, food retail, transport and fuel sectors, in addition to the increased revenue to tourism accommodation providers (section beginning at paragraph 1.5.82).
- 1.5.94 It is important also to note the significant natural fluctuation within local visitor figures. It is therefore not straightforward to identify direct effects of the Wylfa Newydd Project on the visitor numbers. See section 1.6 for further details on how Horizon would work with key stakeholders to monitor and manage effects should they arise.
- 1.5.95 Notwithstanding the recognised uncertainty, the potential effect is likely to be minor, therefore not significant.

- 1.5.96 It is recognised that concerns exist for visitor numbers and therefore revenue generation in certain areas on Anglesey, specifically Cemaes. Effects on tourism related businesses in close proximity to the WYDA Development are assessed within chapter D3 (Application Reference Number: 6.4.3).

Anglesey tourism and destination brand

- 1.5.97 It is recognised that the Wylfa Newydd Project has the potential to adversely affect the tourism brand of Anglesey. There is the potential for changes in visitor numbers, which could continue past the construction period, and changes in revenue for certain tourism accommodation or attraction providers. Horizon would put in place extensive mitigation measures on key tourism related considerations such as traffic and transport (chapter C2, Application Reference Number: 6.3.2), public access and recreation (chapter C3, Application Reference Number: 6.3.3), and landscape and visual (chapter D10, Application Reference Number: 6.4.10). Embedded, good practice and additional mitigation for these considerations are detailed within these chapters of this Environmental Statement.
- 1.5.98 The food and drink sector on Anglesey could also significantly benefit from the opportunities provided by the facilities management and catering contracts which will be required as part of the Wylfa Newydd Project throughout its entire lifecycle. As the value of contracts for this sector cannot be isolated from other contract values, these benefits are considered within the following section on 'Business and Supply Chain'. A boost to this sector for the tourism economy could have knock-on benefits for the associated brand.
- 1.5.99 While it is not feasible to accurately assess the total scale of effects on the tourism brand, it is recognised that effects could be moderate adverse (and therefore significant) without the inclusion of mitigation. This is due to importance of tourism industry to Anglesey in terms of employment and economic activity. The need for proactive action to protect the brand is therefore recognised. See section 1.6 for more information on the measures that would be put in place to support the sector in this regard.

Business and supply chain

- 1.5.100 This section presents analysis of the effects realised within the DCCZ related to expenditure on the construction phase of the Wylfa Newydd Project.

Local spend as a proportion of the total construction value of the Wylfa Newydd Power Station costs

- 1.5.101 No estimates are available at this point in relation to the possible value of local contracts for the overall construction phase of the Wylfa Newydd Project. Horizon estimates that 60% of the £10+ billion Wylfa Newydd Project value during the construction phase would be spent in the UK, however, at present it is not clear how much of the value would be spent locally, i.e. within north Wales. A Business Readiness Programme is being developed in partnership with IACC and Welsh Government to raise awareness of expectations from Horizon and its Menter Newydd contractors of its potential suppliers to make full use of the local supply chain. Detail on the Supply Chain Charter, Action

Plan, Service and Portal is provided under construction related good practice mitigation earlier in this chapter (paragraph 1.4.17).

- 1.5.102 Looking at benchmarking information, other nuclear new build projects have delivered between 2% (Flamanville 3) and 4% (Sizewell B) of their total project value locally (for more on benchmarks see appendix C1-2, Application Reference Number: 6.3.9) [RD10]. It should be noted that the local areas for these projects represent a smaller area than north Wales, approximately equivalent to the KSA.
- 1.5.103 For the Wylfa Newydd Project, if between 2% and 4% was achieved as a local contribution, this would be equal to an investment of between £200 million and £400 million within north Wales over the construction period.
- 1.5.104 Any local contribution should be considered in the context of the local economy. In 2015, the GVA of north Wales was £12.8 billion, an increase of 3.4% on the previous year [RD20]. Based on the annual GVA of the economy and assuming an average investment per year, a potential local spend of 4%, therefore around £400m as indicated above, equates to annual growth (over 2015 values) of 0.3% in GVA in north Wales. This is equivalent to a 16% increase on the 10-year average annual growth rate (2.1%) in GVA in north Wales. Given this magnitude of change and the high importance of the north Wales economy, the significance of this effect is assessed as moderate beneficial.
- 1.5.105 The local investment indicated above could also be considered in terms of the number of indirect and induced jobs supported. Whilst this is not an additional benefit, it provides a different way to assess the value of the investment. The jobs are also additional to the estimated 2,000 home-based workers expected to be directly employed on the Wylfa Newydd Project during construction.
- 1.5.106 An investment of between £200 million and £400 million represents the provision or safeguarding of between 1,200 and 3,500 job years over the investment period, equivalent to 120 to 350 Full Time Equivalent jobs. These estimates are based on a 'spend per employment' figure, taken from the construction sector overall (£113,724) and from 'civil engineering' (£161,879) [RD20] to account for the variability within the sector. This represents just under 1% of the nuclear-relevant employment within the DCCZ (61,800 Full Time Equivalent).
- 1.5.107 This effect also carries positive implications for Welsh language and culture as the creation of a sustainable employment source, supported by an active Jobs and Skills Strategy (Application Reference Number: 8.3) and Supply Chain Charter and Action Plan (see paragraph 1.4.17 for further detail), would serve to support the retention of Welsh speakers locally who might otherwise have to leave the area to find suitable work. This is further considered within the WLIA (Application Reference Number: 8.21).

Labour churn

- 1.5.108 New job opportunities would create a number of different effects within the local labour market, including encouraging existing workers to move from a current job to work directly on the Wylfa Newydd Project, referred to as labour

churn. In all economies, business enterprises and employment shift continually as changes in markets and technologies open up new opportunities and reduce others. In a well-functioning labour market, workers move into new occupations, industries and locations following signals given by employment and wage growth.

- 1.5.109 Information on potential wage rates for workers on the Wylfa Newydd Project is not available at present and it is likely to vary significantly across the types of roles. It is likely that they would be paid the standard rates for construction workers according to the National Joint Council for the Engineering Construction Industry or Construction Industry Joint Council. Given the role variability in these rates, data on average earnings is considered. These data show that the median wage for Anglesey residents was around £21,900 in 2015, and for the construction sector in Wales it was slightly higher at £24,000 [RD22].
- 1.5.110 Labour churn can have either beneficial or adverse effects, depending on the type of position and the investment made in the employee. Labour churn in the context of the Wylfa Newydd Project could arise through any of the following:
- creating a vacancy in another sector or with another employer that can be filled by another existing (home-based) worker from within the DCCZ;
 - attracting a new worker from outside the DCCZ;
 - allowing an unemployed person from within the DCCZ to gain employment; or
 - attracting an unemployed person from outside the DCCZ.
- 1.5.111 Between 2012 and 2013, employment within the DCCZ grew by around 7,800 jobs overall; however, this was a result of just over 12,500 job movements – the sum of jobs lost and gained over the same period. This general turnover of jobs represented around 9% of the average of total employment for the area. Anglesey also has significant out-migration and out-commuting indicating that there is not a sufficient number or type of jobs available for the population. The creation of local jobs would serve to improve this position. Further detail on the labour market is provided in the skills and local labour section of the technical appendix C1-2 (Application Reference Number: 6.3.9).
- 1.5.112 This turnover assessment implies that the local economy could sustain a maximum of 5,560 of the workers defined as possessing ‘nuclear relevant’ skills, moving from their existing jobs into new jobs created by the Wylfa Newydd Project, without causing an effect beyond the capacity of the local economy to absorb. The estimated number of home-based workers from the DCCZ is 2,000, which is significantly less than current turnover rates in the ‘nuclear relevant’ workforce sectors locally.
- 1.5.113 Initial analysis therefore suggests little effect on the labour market, which is recognised and supported by the results of the Business and Supply Chain Survey (further detail is available in appendix C1-2, Application Reference Number: 6.3.9). The consultation raised, a number of concerns about the potential for an effect on staff retention in relation to the Wylfa Newydd Project. These concerns related to both skilled and experienced staff in the nuclear

and construction industries, and to catering and service-based sectors, where employees might move to take up facilities management, security or clerical positions on the Wylfa Newydd Project.

- 1.5.114 The results of the business survey provided a mixed view of potential labour churn. Some local businesses highlighted the likely increased demand for some occupations and higher wage levels as potential concerns. However, a number of businesses indicated that they expected to work on the Wylfa Newydd Project and could benefit from being able to offer staff longer and more secure contracts.
- 1.5.115 The Supply Chain Action Plan, Service, and Portal (see paragraph 1.4.17 for further detail) would seek to support businesses to engage in the Wylfa Newydd Project and benefit directly, while the Jobs and Skills Strategy (Application Reference Number: 8.3), would seek to recruit new employees to the labour market. In addition, see section 1.6, for details of additional mitigation that would support businesses.
- 1.5.116 Based on the survey responses, consideration of the existing turnover in the market, the good practice mitigation in place, and recognition of the local concerns raised on the issue, the potential effect of labour churn on local business and the local economy is assessed as minor adverse, and therefore not significant.

Operation

Skills and local labour

Changes to employment on Anglesey

- 1.5.117 The operational workforce for the Power Station Site is expected to consist of around 850 staff. Under normal operations, staff would largely be working five days per week; however, there would be a small number of staff working a night shift.
- 1.5.118 The creation of 850 new permanent positions at the Power Station represents a significant contribution to local employment opportunities and to the long-term population stability on Anglesey. These local employment opportunities would help to sustain and increase the Welsh-speaking population on Anglesey. Based on benchmarks from other projects, for instance, the Existing Power Station, and also the implementation of a wide range of enhancement measures by Horizon, it is expected that around 85% of those employed would already be resident within the DCCZ, so would be local in nature. These measures include:
- training and development;
 - knowledge transfer;
 - engagement with schools, including science, technology, engineering and mathematics activities;
 - apprenticeships;
 - work placement and work experience;

- graduate programmes;
- engagement with the long-term unemployed and ex-armed forces personnel; and
- the inclusion of experienced people from the existing labour market.

1.5.119 Figure C1-7¹⁵ shows the links between these parties and how they will serve to feed into the Wylfa Newydd Project via the training support partners to be engaged by Horizon.

1.5.120 It is also assumed that almost all of the 850 people employed would live in the KSA, including a proportion that would relocate to Anglesey to take up employment. Based upon a distribution of operational workers similar to that at the Existing Power Station (where 87% of operational workers resided on Anglesey), it is estimated that 87% of the total workforce (or 740 workers) would ultimately reside on Anglesey. The 2011 Census showed that around 30,400 Anglesey residents were employed at that time [RD5]. The number of people employed on Anglesey could therefore increase by up to 2% as a result of the permanent operational jobs at the Power Station. This does not take into account losses as a result of other activities on the island, such as the decommissioning of the Existing Power Station, although this is expected to continue to employ several hundred staff in the short to medium term. Therefore, the future labour market baseline might be different at the start of operation.

1.5.121 Given the trends of outward migration amongst the 15 to 29 age cohort from Anglesey, north Wales and Wales as a whole, the opportunities presented by the Wylfa Newydd Project may also serve to support the reversal of this trend as they are permanent positions throughout the 60-year operational period.

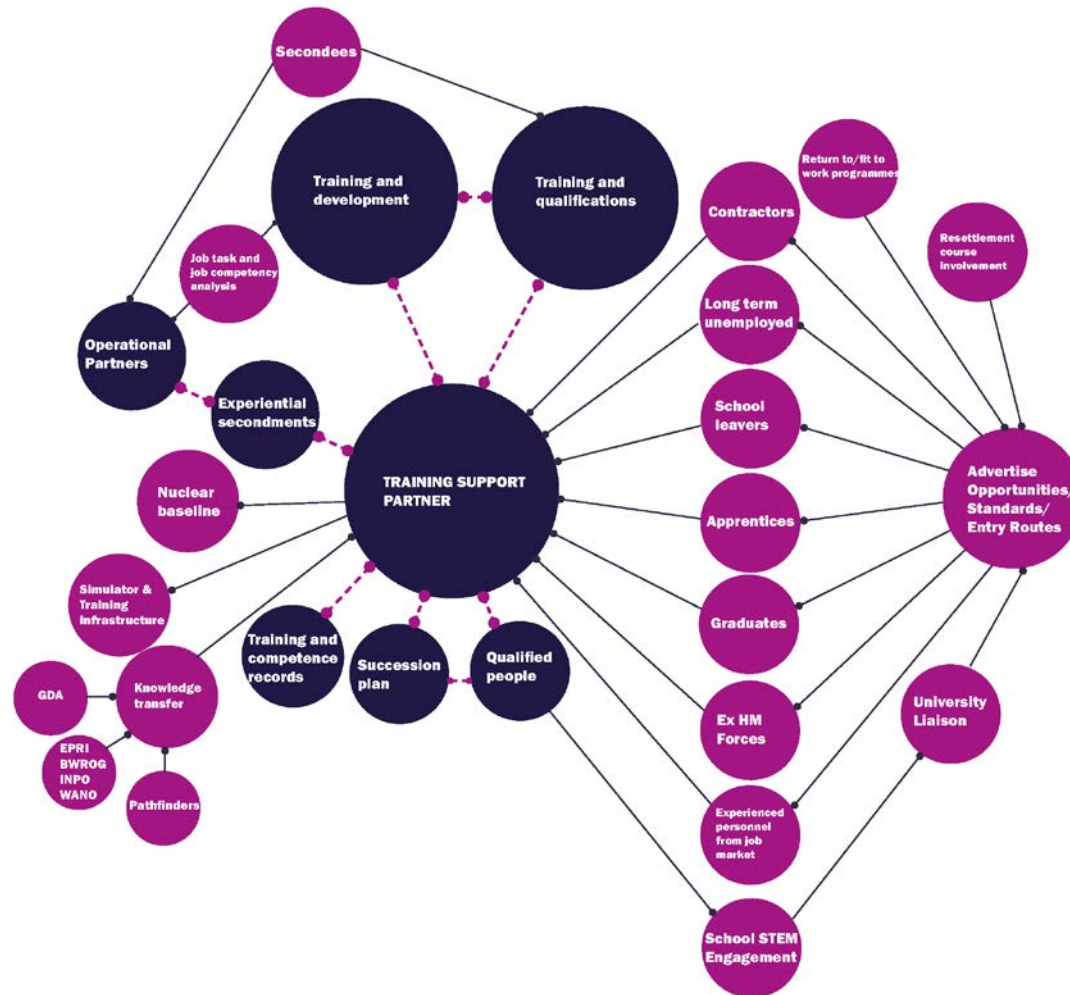
1.5.122 Given the magnitude of change in local employment, the long-term nature of the positions, and the potential to reduce outward migration trends, alongside the importance of the local labour market, the significance of effects on employment levels on Anglesey is assessed as major beneficial.

1.5.123 During planned periods of Power Station outage for maintenance, the additional outage workforce would comprise up to 1,000 additional staff. The majority of these staff would be non-home-based so it is assumed that the creation of these jobs would have little or no impact on employment on Anglesey. If this is the case, effects would be assessed as not significant. However, it is recognised that local companies do currently provide services to the Existing Power Station during outages and that at Sizewell B the first outage recruited 37% of its workers from within the DCCZ for that site. It is therefore possible that outages could provide some beneficial employment outcomes however this is currently uncertain.

¹⁵Abbreviations within figure C1-7: GDA – General Design Assessment, EPRI – Electric Power Research Institute, BWROG – Boiling Water Reactor Owners Group, INPO – Institute of Nuclear Power Operations, WANO – World Association of Nuclear Operators, HM – Her Majesty's, and STEM – Science Technology Engineering and Maths.

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Figure C1-7 Jobs and Skills Engagement Plan during Operation



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Accommodation and spatial distribution of the workforce

Availability of bed spaces within the KSA

- 1.5.124 It is estimated that around 128 operational staff (15%) may come from outside the DCCZ to take up employment on the Wylfa Newydd Project¹⁶. The approximate tenure mix at full operation is estimated at 80% owner-occupation and 20% PRS, equating to a demand of around 102 owner-occupied houses and 26 from PRS. This anticipated demand is relatively low in comparison with the construction stage. As the demand is likely to be spread over a number of years, coinciding with the rundown of construction (and the release of some accommodation previously used by construction workers), it is not expected that there would be any noticeable constraints to meeting the demand for accommodation associated with operation. In addition, the JLDP has planned for growth realised through the Wylfa Newydd Project. The effect of the demand for housing created by the operational staff is therefore assessed as not significant.
- 1.5.125 As described in paragraph 1.5.123 of this chapter, outages would require an additional workforce being present at the Power Station. As outages were undertaken at the Existing Power Station and the workforce was accommodated without undue effect on the tourism accommodation stock, this is not assessed further. Sufficient headroom is considered to be available to accommodate outage workers, even within Anglesey's August tourism peak. The long-term economic value of this demand for tourist/other accommodation providers, may also be significant. Given the uncertainty in the value of this sector during operation of the Power Station, it is not feasible to assess how significant this may be.

Public services

- 1.5.126 Table C1-18 notes that the operational phase of the Wylfa Newydd Project may result in an increase in the local population of about 200 people. The effects of this increase are considered below in relation to education and emergency services.

Table C1-18 Non-home-based workers and dependants during operation

Additional population	Number
Non-home-based workers	128
Estimated partners	40
Estimated dependants	31
Total	199

¹⁶ This is irrespective of where workers may reside when they take up employment, as outlined in paragraph 1.5.120.

Demand for education

- 1.5.127 Table C1-8 shows the breakdown of the additional population within the KSA during operation. These estimates are based on the average demographic and family profile of the comparative operational workforce in the UK. It is expected that, at the outset, 15% of the 850 operational staff would be from outside the KSA.
- 1.5.128 As noted in paragraph 1.5.124, the operational workforce would be expected to reside in owner-occupied or PRS accommodation, and would therefore pay council tax and other local taxes as appropriate. Some non-home-based construction workers would also be expected to become established over the time of the construction period and become part of the permanent population of the area.
- 1.5.129 The potential additional demand for education services arising from the dependants of the operational workforce falls well below the available capacity within the system at present, as set out in the construction assessment (see paragraphs 1.5.50 to 1.5.59). Based on the assumption that the operational workforce would live in the same sub areas as the workforce for the Existing Power Station, the expected demand in any given sub area within the KSA would be minimal. As there is available capacity currently and going forward as far as projections are available (paragraph 1.3.14), in both primary and secondary schools, the effect of this increased population is considered not significant. The impact on Welsh language is covered within the WLIA (Application Reference Number: 8.21).

Effect on demand for emergency services

- 1.5.130 The assessment of the operational workforce followed the same approach as the assessment of effects during construction. The potential effects are summarised in table C1-19.

Table C1-19 Effects on demand for emergency services during operation

Public service	KSA	Significance
Policing services	Seven additional incidents on Anglesey, equivalent to 0.2% increase	Not significant
Ambulance services	Approximately 69 additional calls per year, equivalent to less than 0.21% increase on Anglesey	Not significant
Fire and rescue services	Attendance at one additional incident per year, equivalent to less than 0.1% increase in north Wales	Not significant

- 1.5.131 It is however recognised that the operation of the Power Station is likely to create demand on these services outside that estimated above as the service provision or resource needs are not simply linked to such metrics. It is therefore recognised that resource requirements may occur. See section 1.6 for details of proposed measures to provide support where resources as required.

Tourism

Visitor numbers as a result of operation

- 1.5.132 The Visitor Behaviour Survey included questions on the operation of the Power Station. The survey results indicated that just over 90% of visitors did not consider that the presence of the Power Station would affect their likelihood of returning to Anglesey, whilst 1% indicated that they would be more likely to return and 8% reported that they would be less likely to return during operation. Amongst the 8% who would be less likely to visit when the site was operational, most said that this was because they were anti-nuclear power and thought it was dangerous (40% of the 8%), while another 12% (of the 8%) said that the new Power Station would spoil the environment and ruin the landscape. However, of those that indicated that they would be less likely to return, the majority either were not aware of the Existing Power Station, or, if they had seen the Existing Power Station during their visit, they stated that it had not had an adverse impact on their stay.
- 1.5.133 The results therefore suggest that the actual number of tourism visits that may be lost during operation is likely to be small. The potential effect is assessed as minor adverse, therefore not significant. As there is the potential for a small reduction in visitor numbers, section 1.6 outlines measures to support the sector during the operational phase.
- 1.5.134 Horizon has committed to provide a Visitor and Media Reception Centre near the Power Station Site. This will form part of a separate planning application and so is not part of the DCO application. The design and facilities contained within the centre will be subject to discussion with key stakeholders in advance of planning permission being submitted. There is an opportunity for this centre to provide facilities for tourists and local visitors to gain a greater understanding of the Wylfa Newydd Project and the Energy Island Programme, and for the centre to act as a community resource with a café and children's play area. The centre could also be used to showcase local produce (e.g. food and crafts) and boost the associated brand for this produce. This centre would provide a focal point in the north of the island for tourist to visit and potentially for communities to gather. While it is not part of this application and its construction will not reduce positive effects nor increase adverse effects outlined within the socio-economic analysis presented here, it is considered to be consistent with the measures outlined later to mitigate and enhance tourism locally.

Business and supply chain

Annual operational expenditure

- 1.5.135 The total value of the operating expenditure over the lifetime of the Power Station is equivalent to £1.8 billion in present value terms, equivalent to around £30 million per year. This estimate excludes staff costs, fuel, business rates, other financial contributions, National Grid fees or other trading costs.
- 1.5.136 In 2015, workplace GVA in north Wales totalled £12.8 billion [RD14]. The estimated annual operational expenditure in present value terms is equivalent

to 0.2% of annual GVA, which, over the previous 10 years, showed an average annual growth of 2.1%. This effect is therefore assessed as minor beneficial.

Wages to Anglesey residents

- 1.5.137 Based on industry average wage rates by occupation, it is estimated that the staff costs at the Power Station would be equivalent to £506 million in present value terms over the 60-year operation phase. It is assumed that the majority of the operational staff would ultimately live on Anglesey. In line with the workforce trends of the Existing Power Station, it is expected that the equivalent of around £8.4 million in present value terms would be invested into the Anglesey economy annually for the 60 years of operation.
- 1.5.138 Using an income multiplier of 2.4 for the electricity sector it is estimated that these direct wages would generate additional income in the local economy worth £11.6 million per year, which would create a total wages-related income of around £20 million annually to the overall Anglesey economy [RD15].
- 1.5.139 In 2015, workplace GVA on Anglesey totalled £938 million, and showed an average annual growth of 1.3% over the previous 10 years [RD14]. The annual average direct, indirect and induced increase in income of £20 million therefore represents an increase of 2.1% over baseline levels. The significance of effects is therefore assessed as moderate beneficial.

Decommissioning

Skills and local labour

Changes to employment in the KSA

- 1.5.140 The decommissioning schedule is not known at this stage; however, it is expected that the majority of decommissioning would be undertaken within 10 years of the end of power generation. The remainder of decommissioning work would be associated with the storage and disposal of spent fuel and radioactive waste and would take much longer; up to 130 years in addition to the aforementioned 10 years. It is likely that there would be a reduction in staff numbers prior to the start of decommissioning, as operations would diminish prior to final Unit shutdown. Thus, at the start of decommissioning, it is likely that there would be fewer than 850 staff employed at the Power Station.
- 1.5.141 A report considering the social effects of the decommissioning of the former Magnox power station at Trawsfynydd in Gwynedd, concluded that the effect of the station's closure on local unemployment was small and difficult to detect [RD23]. This was a result of the influence of seasonal variation and national economic conditions on employment levels locally. Unemployment was estimated to have increased by less than 1% as a result of the closure of the station. Of the 342 staff who had lost their jobs at Trawsfynydd, 338 were still living locally. In terms of the local income retention, this group were all contributing to the local economy through salaries, pensions and redundancy payments. This was estimated as equivalent to around 53% of the contribution from salaries when Trawsfynydd was fully operational.

1.5.142 The Environmental Statement for the decommissioning of the Existing Power Station stated that the closure of the station would lead to the loss of 860 direct and indirect jobs, and the subsequent migration of adults and children from the island [RD24].

1.5.143 The loss of these direct jobs from the KSA, and mostly Anglesey, is largely unavoidable; however, there may be opportunities to transfer employment to other nuclear sites in the UK depending on the employment capacity and phase of operation at alternative sites. As it is not possible to predict employment levels at the start of the decommissioning phase, the effects on employment cannot be quantified for this Environmental Statement.

Accommodation and spatial distribution of the workforce

Effects during decommissioning

1.5.144 It is not possible to assess the effect on accommodation during the decommissioning stage, as the baseline of available accommodation stock may differ significantly from the current situation.

1.5.145 The number of workers required during decommissioning is not known; however, it is likely to be much smaller than the peak construction workforce. The anticipated demand in total, for all accommodation types including owner-occupied, PRS and tourism accommodation, is likely to be lower than during the construction stage. The need for the provision of temporary workers' accommodation would be assessed as part of the detailed decommissioning stage Environmental Impact Assessment (EIA).

Public services

1.5.146 The scale and duration of the workforce required for decommissioning is unknown, but it is expected to be less than during peak construction. Without the employment requirements and knowledge of the potential home-based employment numbers, the effects on the provision of public services cannot be assessed. However, it is assumed that adverse effects would be assessed and mitigated as part of the EIA for the decommissioning stage.

Tourism

Tourism revenue

1.5.147 During the decommissioning phase, the arrival of non-home-based workers may result in an increased demand for tourism accommodation; however, this is likely to be significantly less than during the peak construction phase.

1.5.148 There would be some demand for bed spaces, particularly during final site clearance, and this would result in increased revenue for tourism accommodation providers as well as additional indirect or induced revenue in the local economy due to the multiplier effects on expenditure. This cannot be quantified, as the duration and scale of the workforce and the proportion of non-home-based workers are not known at this time. However, in comparison to peak construction (assessed as moderate beneficial), the combined effects

of direct, indirect and induced expenditure in the tourism sector is likely to be much less significant.

- 1.5.149 As the overall demand is expected to be lower, the risk of changes in the overall quality of tourism accommodation resulting from high occupancy rates is also expected to be lower during the decommissioning phase.

Visitor numbers

- 1.5.150 Visitor behaviour may change in response to the decommissioning of the Power Station. These changes may include visitors choosing to undertake different activities while on Anglesey, changing the length of their stays or the pattern or repeat visits. To date however no such effects from the Existing Power Station decommissioning have been identified.
- 1.5.151 The effects may be similar to those during construction and are therefore assessed as of potentially minor significance.

Business and supply chain

Local spend as a proportion of final site clearance

- 1.5.152 It is anticipated that a spent fuel storage facility and intermediate level interim storage building required for decommissioning would be constructed during the early years of operation and therefore their construction would not form part of the decommissioning phase. However, towards the later stages of decommissioning, a fuel repackaging facility would need to be constructed so that the remaining spent fuel can be transferred to a geological disposal facility. This could have supply chain effects in terms of sourcing materials and services within north Wales, alongside supporting or safeguarding some local employment. The other aspects of decommissioning, such as storage and transport of spent fuel and intermediate level waste, are highly specialised and, based on knowledge of the current businesses and sectors present, are considered unlikely to be undertaken by businesses within north Wales.
- 1.5.153 The decommissioning process introduces substantial amounts of money into the economy, according to the Environmental Statement for the decommissioning of the Existing Power Station, it is estimated that the final site clearance phase of the decommissioning process would cost £929 million over a 10-year period. By comparison, it is estimated that the Enabling Works of the Wylfa Newydd Project would cost between £8 million and £12 million over a 2-year period, the majority of which is likely to be invested locally within north Wales. While the value of investment in the final site clearance is not known at this stage, it is assumed that a proportion could be spent within north Wales. It is not possible to assess the potential effect of this investment as the value of the investment is not currently known, and nor is the future GVA baseline.

Labour churn

- 1.5.154 There is the potential that employment generated during decommissioning and final site clearance could result in labour churn, leaving other local businesses with vacancies that are difficult to fill. Given that the scale of

employment during decommissioning is likely to be significantly less than peak construction, and given the specialist nature of the required workforce, the effect is not likely to be significant throughout the DCCZ. However, localised effects are possible. This effect would be assessed in a future EIA for the decommissioning stage.

1.6 Additional mitigation

- 1.6.1 In accordance with chapter B1 (Application Reference Number: 6.2.1), embedded and good practice mitigation measures relevant to socio-economics were taken into account when determining the 'pre-mitigation' significance of effects. These are detailed in the design basis and activities section of this chapter.
- 1.6.2 Proposed additional mitigation measures would be implemented to address the potential significant effects identified in the assessment of effects section. These additional mitigation measures are summarised sections below as well as table C1-20 and table C1-21 for construction and operation respectively.

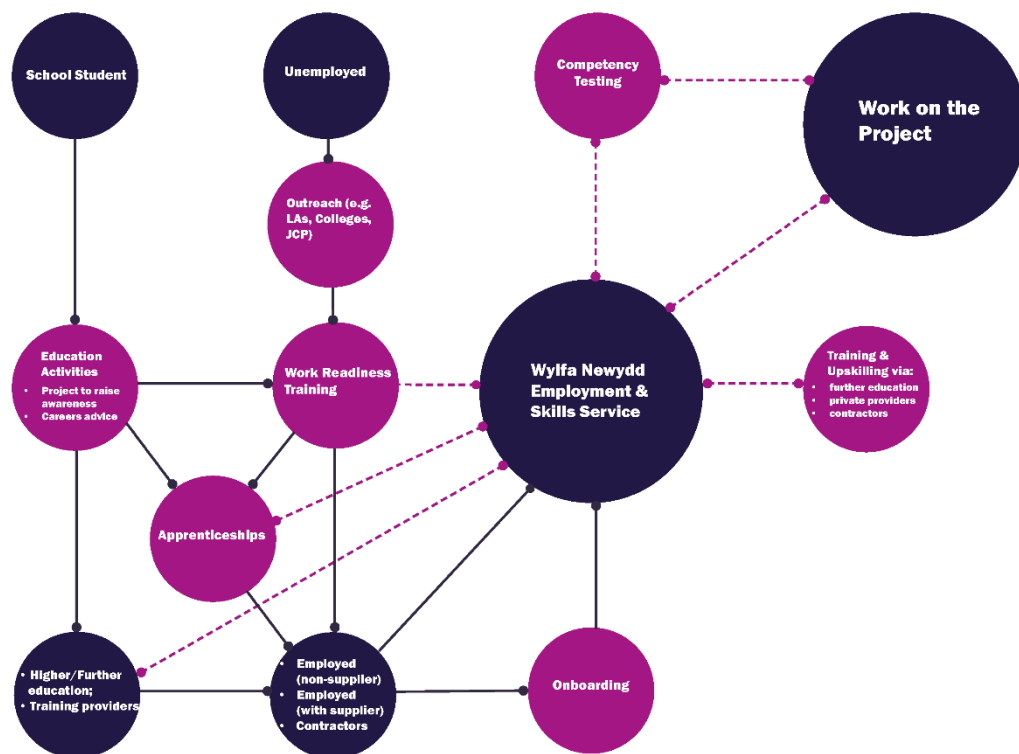
Construction

- 1.6.3 The additional mitigation set out in chapters C2 (Application Reference Number: 6.3.2), C3 (Application Reference Number: 6.3.3), C4 (Application Reference Number: 6.3.4), C5 (Application Reference Number: 6.3.5), and D10 (Application Reference Number: 6.4.10) all serve to support the mitigation of socio-economic effects. In addition, mitigation outlined with the WLIA (Application Reference Number: 8.21), HIA (Application Reference Number: 8.19) and EqIA (Application Reference Number: 8.22) all serves to reduce effects on socio-economic receptors.
- 1.6.4 The Jobs and Skills Strategy (Application Reference Number: 8.3) as outlined as a good practice mitigation measure above (paragraph 1.4.16), includes the setting up of the WNESS. Supporting the implementation of the WNESS is considered good practice mitigation but the elements contained in the WNESS exceed standard approaches to enhance local opportunities and therefore are considered additional mitigation. This service, will aid the recruitment and training of workers to support the construction programme. The Jobs and Skills Strategy (Application Reference Number: 8.3), and specifically the WNESS as part of that, will seek to recruit new employees to the labour market; train and upskill both new entrants and others; and provide a brokerage service by backfilling vacant posts to support businesses whose workers have moved on to the Wylfa Newydd Project, creating difficulty in replacement. This will serve to support and mitigate potential effects relating to labour churn should they arise. The Jobs and Skills Strategy (Application Reference Number: 8.3) would also seek to maximise the potential for local employment on the Wylfa Newydd Project, and increase the current estimation of 2,000 home-based workers. A pilot of this service for the Site Preparation and Clearance (SPC) Proposals is expected to be operational in 2018.
- 1.6.5 The Employment and Skills Portal is a web based procurement platform as part of the Employment and Skills Service to allow people to gain employment

on the Wylfa Newydd Project. It will capture vacancies with the Project's contractors.

- 1.6.6 Specific concerns have been raised locally about the ability of the Fire and Rescue Service to respond to any additional risks due to the proportion of volunteers within the Service on Anglesey and the possibility of their free time being occupied by employment related to the Wylfa Newydd Project. It should be noted, as outlined above, that the WNESS will provide support to backfill positions where they have been vacated to take up employment on the Wylfa Newydd Project.
- 1.6.7 Figure C1-8 shows the proposed approach to the use of the WNESS, with links to school pupils, other students, and the unemployed. Further detail can be found in the Jobs and Skills Strategy (Application Reference Number: 8.3)

Figure C1-8 Wylfa Newydd Employment and Skills Service¹⁷



- 1.6.8 The key aspects of the Workforce Accommodation Strategy (Application Reference Number: 8.4) which seeks to avoid, reduce and mitigate effects on the housing market, via the provision of a Housing Fund and WAMS, include:
- Bringing empty homes back into use over a four to five-year period in the lead up to peak construction;
 - New-build permanent housing, including affordable housing;

¹⁷ LA – Local Authority, JCP – Job Centre Plus

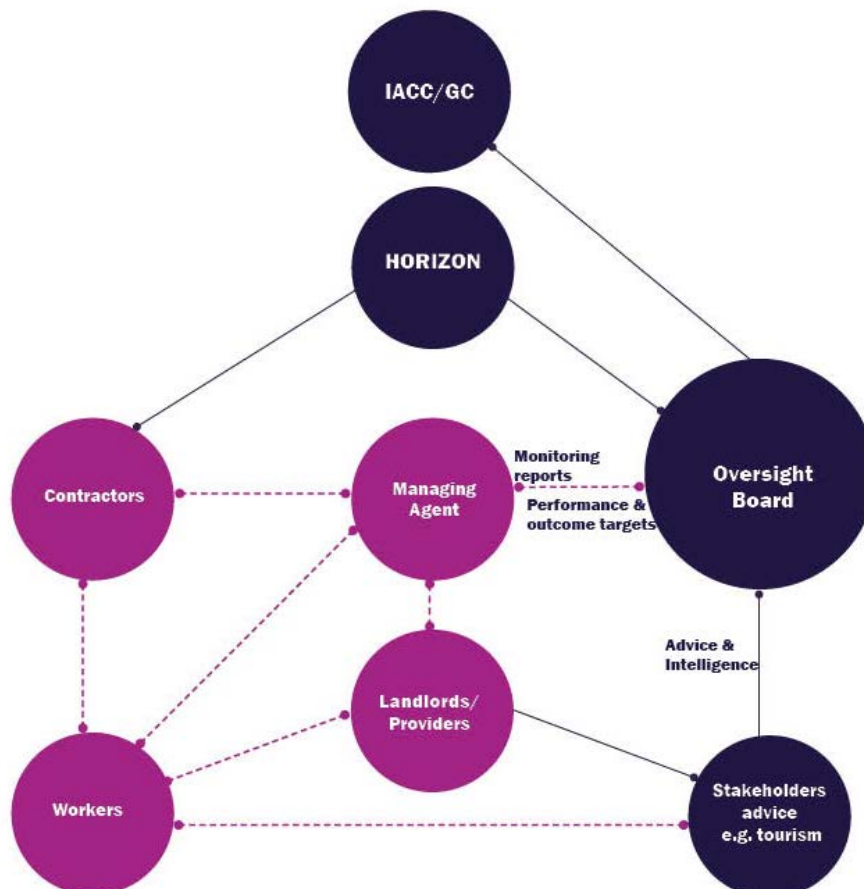
- Social-rented sector thought the provision of assistance to existing tenants;
- Smaller interventions to stimulate the supply of latent accommodation;
- Support to IACC for provision of additional housing officer capacity; and
- The WAMS will be managed by an oversight board who will seek to monitor and manage the effects of the worker-related demand.

1.6.9 The Housing Fund would also serve to increase the available stock in both PRS and owner-occupied categories thereby reducing the potential for demand exceeding supply in these sectors.

1.6.10 The Housing Fund's timing and triggers for the release of funding are still to be agreed, but the Oversight Board would be expected to seek to prioritise spending on measures that can boost supply quickly such as expanding existing empty homes programmes.

1.6.11 Figure C1-9 shows the proposed structure of the WAMS which forms a key part of the Workforce Accommodation Strategy (Application Reference Number: 8.4). This service will maintain a database of suitable properties; provide a means for workers to search for housing; capture and record data and provide reports to a board that oversees the service to enable management of the available stock.

Figure C1-9 Workforce Accommodation Management Service (WAMS)



- 1.6.12 The WAMS will serve to avoid or reduce the potential for localised effects, specifically in tourism and PRS accommodation stocks, through the careful management and monitoring of the use of these stocks. This and other aspects of the Workforce Accommodation Strategy (Application Reference Number: 8.4) such as bringing empty homes back into use and support for new housing provision will be key mitigation measures to address the demand for accommodation across the area.
- 1.6.13 Concerns have also been raised around the potential for the use of PRS and latent accommodation by workers to create additional fire risk. The WAMS will serve to provide a mechanism to manage and monitor the accommodation provided and ensure compliance with all relevant fire and safety regulations.
- 1.6.14 The WAMS will also seek to reduce the potential for long term effects on the quality of the tourism stock manifesting, via support being given to accommodation providers to allow them to share their stock amongst a number of accommodation provider sites, and to ensure they have sufficient time to maintain their properties.
- 1.6.15 The Construction WAMS Portal will provide a database of suitable properties offered by landlords and providers, including Horizon's own Site Campus. It is provided as part of the Workforce Accommodation Strategy and would be secured through the Section 106 Agreement to be entered into between Horizon and the IACC. It provides a means for workers to search for housing that meets their needs and be put in contact with the property owners or their agents.
- 1.6.16 School enrolment will be monitored by the IACC and would be linked to the WAMS dataset where possible. Should localised issues arise where applications are made for places in schools at capacity and IACC can demonstrate the nature of the resulting effect (e.g. temporary short-fall in funding, additional costs for appeals processes etc.) Horizon will provide funding to address this via the Community Impact Fund, which in turn will be secured via planning obligations.
- 1.6.17 Demand for access to leisure centres is a key local concern. While no significant effect has been identified it is proposed that a mechanism is included within the remit of the Community Impact Fund for the provision of funding for leisure services should monitoring by providers identify significant additional demand which is not already funded through other mechanisms (for example, council tax provision).
- 1.6.18 The remit of the Community Impact Fund will also include effects arising to local recreational resources and open spaces, and for unforeseen effects arising as a result of the presence of the workforce in the area, including effects on people/groups with protected characteristics. The fund will be managed by a committee consisting of representatives from Horizon, the IACC and the local community. Draw-down of funds would be subject to satisfaction of a number of conditions. These are yet to be agreed with relevant parties. It is expected that a Community Impact Fund will be set up as a requirement under the SPC Section 106 Agreement to be entered into between Horizon and the IACC and that the mechanisms put in place will continue through the construction process.

- 1.6.19 The provision of a Tourism Fund by Horizon (secured through planning obligations) would serve to address any material effects which could arise on the sector as a result of the Wylfa Newydd Project. Initially, Horizon are committed to providing a Tourism Fund as part of the SPC Proposals. This fund will seek to ensure that the perceived impacts on the local tourism sector can be moderated using positive mechanisms to develop existing and new forms of tourism. This will be delivered as part of the S106 agreements for that Town and Country Planning Act, 1990, (TCPA) application and is expected to be in place by mid-2018.
- 1.6.20 For the DCO application, the Tourism Fund will be administered via the Accommodation and Tourism Services sub-group (for further detail, consult section three of the CoCP (Application Reference Number: 8.6)) attended by Horizon, the IACC, Welsh Government and local sector representatives as appropriate. The terms of reference and governance structure of the Tourism Fund are yet to be agreed. The triggers applied by the aforementioned sub-group for the release of funds are also still subject to ongoing discussions with stakeholders. However, as noted above, the provision of funding for early action to support the IACC's Destination Management Plan [RD25] (which defines how the Destination Management Partnership, alongside IACC will manage Anglesey as a destination in terms of stakeholders, their roles, and actions that to be taken in terms of visitors, residents, businesses and the environment) will be made available via Section 106 agreements associated with the SPC TCPA application.
- 1.6.21 Additional support will also be offered as part of the Tourism Fund to boost Wales Visitor Survey [RD25], Visit Wales's Business Barometer and local accommodation assessments. The data coming from such surveys would provide evidence of, for instance, changes in visitor numbers locally and, where changes can be linked to Wylfa Newydd Project effects, would support requests for funding from a Tourism Fund to address any such effects. This support would be provided initially as part of the Tourism Fund provisions in the SPC Section 106 agreement outlined above and therefore additional surveying support is expected to be available from mid-2018. This funding would continue to be made available during the construction phase and for two years after first operation of Unit 2 as part of the DCO Tourism Fund. It is anticipated that there will be no break in the funding for monitoring between the SPC Proposals and the commencement of main construction works. The additional funding under the Tourism Fund associated with other activities or actions will be linked to the commencement of construction on site.
- 1.6.22 A temporary visitor viewing area will also be provided during the construction phase to provide safe access for visitors to witness the construction of the Power Station. This area will also provide a potential draw to visitors to the north of the island thereby supporting the tourism businesses in the area and mitigating the potential for localised changes in visitor distribution around the island. The viewing area will be available from the start of main construction and may evolve as construction progresses, dependant on the positioning of activities. The provision of such a viewing area will be secured through the Main Power Station Site Sub-CoCP (Application Reference Number: 8.7).

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Table C1-20 Proposed additional mitigation measures – construction

Proposed additional mitigation measures	Objective	Achievement criteria and reporting requirements
<p>Workforce Accommodation Strategy (Application Reference Number: 8.4) including a Housing Fund and WAMS (secured through planning/Section 106 Obligations).</p>	<p>To reduce the potential for adverse effects arising within the accommodation sector, with specific focus on the PRS and tourism stocks.</p>	<p>The Housing Fund would seek to support:</p> <ul style="list-style-type: none"> • Bringing empty homes back into use over a four to five-year period in the lead up to peak construction; • New-build permanent housing, including affordable housing; • Social-rented sector thought the provision of assistance to existing tenants; • Smaller interventions to stimulate the supply of latent accommodation. • Support to IACC for provision of additional housing officer capacity. <p>The WAMS will be managed by an oversight board who will seek to monitor and manage the effects of the worker-related demand.</p>
<p>A Workers' Code of Conduct, drug and alcohol testing, and Community Liaison Officers (secured through DCO requirement).</p>	<p>This will be prepared in accordance with the principles in the WMS (Application Reference Number: 8.5) and manage and control workforce behaviour and conduct and avoid poor behaviour which would impact on the community and authorised development within requiring police involvement.</p>	<p>Employment of Community Liaison Officers and the provision of a hotline to allow members of the public to raise any concerns.</p>
<p>Tourism Fund (secured through planning/Section 106 Obligations).</p>	<p>To provide funding to identify (via monitoring) and address adverse effects on the sector,</p>	<p>This fund would be available to address adverse effects if they arose. The monitoring would pick up changes which would trigger release of funding for mitigation. Decisions would be made on</p>

Proposed additional mitigation measures	Objective	Achievement criteria and reporting requirements
	<p>should they arise. These could include a wide range of activities depending on how effects manifest.</p>	<p>funding release by the Accommodation and Tourism Services sub-group, overseen by a programme board. Funding will initially be provided as part of the SPC TCPA application and will be available from mid-2018.</p>
<p>Temporary visitor viewing area (secured through the Main Power Station Site sub-CoCP, Application Reference Number: 8.7)</p>	<p>To provide safe access for visitors to witness the construction of the Power Station and to provide a potential draw to visitor to the north of the island.</p>	<p>To be provided at the start of the construction programme.</p>
<p>Community Impact Fund (secured through planning/Section 106 Obligations).</p>	<p>To provide access to funding for localised issues resulting from the Wylfa Newydd Project such as those associated with schools, leisure facilities, recreational resources and open spaces, along with other unforeseen effects.</p>	<p>To provide funding for localised issues, such as schools and leisure facilities. It will also provide access to funding to address unforeseen community effects. Funding will be released subject to the satisfaction of a number of conditions, yet to be agreed.</p>
<p>Emergency services funding (secured through planning/Section 106 Obligations).</p>	<p>To provide emergency services with access to funding to offset additional costs resulting from the Wylfa Newydd Project workforce.</p>	<p>Following ongoing discussions with public service providers, it is expected that a package of additional funds would be agreed to enable adequate resources to be provided as required for emergency services. It is therefore expected that detailed service planning would be conducted to facilitate the identification of detailed criteria under which mitigation is requested and funds released.</p>

Operation

- 1.6.23 While it is recognised that no significant effects on tourism have been identified during the operation of the Power Station, it is considered appropriate to allow the Tourism Fund and associated mechanisms set up during construction to continue into the early years of operation of the Power Station. This will facilitate the identification and mitigation of any lagging effects.
- 1.6.24 Horizon are also committed to building a permanent visitors centre on site within 5 years of the end of construction. This would be consented outside of the Wylfa Newydd Project by planning permission through the TCPA regime. The design and facilities contained within the centre will be subject to discussion with key stakeholders in advance of planning application being submitted.

Table C1-21 Proposed additional mitigation measures - operation

Proposed additional mitigation measures	Objective	Achievement criteria and reporting requirements
Tourism Fund (secured through planning/S106 Obligations).	To ensure that for the first two years of operation of Unit 2, effects are monitored and there is a mechanism in place to address any adverse tourism effects should they arise.	The Accommodation and Tourism Services sub-group would stay in place for the first two years of operation of Unit 2, and the Governance process in place for construction would be maintained.

Decommissioning

- 1.6.25 No additional mitigation has been proposed for decommissioning.

1.7 Residual effects

- 1.7.1 This section describes the residual socio-economic effects having taken into account the embedded, good practice and additional mitigation described above. Table C1-22 below provides a summary of significant residual effects identified either prior to or post application of additional mitigation for the construction and operational phases.
- 1.7.2 No significant adverse effects were identified for the decommissioning phase.
- 1.7.3 Additionally, all effects of minor significance or greater identified in the assessment of effects section are summarised in appendix I3-1 (master residual effects table) (Application Reference Number: 6.9.8).

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Table C1-22 Summary of residual effects

Receptor (or group of receptors)	Value of receptors	Description of potential effect	Nature of effect	Potential magnitude of change	Potential significance of effect	Additional mitigation	Post-mitigation magnitude of change	Significance of residual effect
Construction								
Labour market in the DCCZ	High	Changes to employment in the construction sector in the DCCZ. An estimated 2,000 home-based workers would be employed during the peak period of construction.	Beneficial Local Temporary Medium-term	Large	Major beneficial	-	Large	Major beneficial
Labour market on Anglesey	High	Changes to employment in the construction sector on Anglesey. Approximately 1,260 home-based workers would be employed during the peak	Beneficial Local Temporary Medium-term	Medium	Moderate beneficial	-	Medium	Moderate beneficial

Receptor (or group of receptors)	Value of receptors	Description of potential effect	Nature of effect	Potential magnitude of change	Potential significance of effect	Additional mitigation	Post-mitigation magnitude of change	Significance of residual effect
		period of construction.						
PRS accommodation stock in the KSA	High	Number of available bed spaces within the PRS is estimated to be approximately 1,650 while demand for bed spaces in this sector is estimated to be 900. The current constraints on this sector locally are noted as are potential sub area constraints.	Adverse Local Temporary Medium-term	Large	Moderate adverse	Workforce Accommodation Strategy (Application Reference Number: 8.4) including a WAMS and a Housing Fund	Small	Minor adverse
Tourism sector	High	Anglesey tourism as an economic	Adverse Local Temporary	Medium	Moderate adverse	Tourism Fund will be in place as part of the	Small	Minor

Receptor (or group of receptors)	Value of receptors	Description of potential effect	Nature of effect	Potential magnitude of change	Potential significance of effect	Additional mitigation	Post-mitigation magnitude of change	Significance of residual effect
		sector and the destination brand could be affected by the Wylfa Newydd Project. It is not feasible to accurately assess the potential scale of 'brand' effects. Assessment presented is considered to be a worst case position at this time.	Medium-term			SPC TCPA application and will be available from 2018. It will continue to be available into the construction phase of the Wylfa Newydd Project. This fund would be available to address adverse effects if they arose. Decisions would be made on funding release by an Accommodation and Tourism services subgroup, overseen by a programme board.		

Receptor (or group of receptors)	Value of receptors	Description of potential effect	Nature of effect	Potential magnitude of change	Potential significance of effect	Additional mitigation	Post-mitigation magnitude of change	Significance of residual effect
Local economy in north Wales	High	Investment made within the local economy (north Wales). It is estimated that up to 4% of the total £10 billion construction value of the Wylfa Newydd Project could be spent within north Wales.	Beneficial Regional Temporary Medium-term	Medium	Moderate beneficial	-	Medium	Moderate beneficial
Operation								
Labour market on Anglesey	High	Changes to employment on Anglesey with the creation of 850 permanent positions at the Power Station.	Beneficial Local Temporary Long-term	Medium	Major beneficial	-	Medium	Major beneficial
Local economy on Anglesey	High	Annual average direct, indirect and induced	Beneficial Local	Medium	Moderate beneficial	-	Medium	Moderate beneficial

Receptor (or group of receptors)	Value of receptors	Description of potential effect	Nature of effect	Potential magnitude of change	Potential significance of effect	Additional mitigation	Post-mitigation magnitude of change	Significance of residual effect
		increase in income of around £20 million on Anglesey from staff costs at the Power Station, equivalent to an increase of 2.1% over baseline levels.	Temporary Long-term					

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1.8 References

Table C1-23 Schedule of references

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