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Subject: RE: IACC Deadline 2 Submission : Local Impact Report - Economic Development - Supply Chain (email 6)
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Pnawn Da/ Good afternoon,

Gweler ynghlwm cynrychiolaeth CSYM mewn perthynas â'r uchod / Please see IACC's representation in respect of the above.

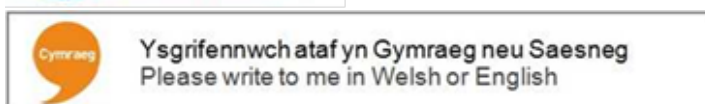
Bydd fersiwn Gymraeg yn cael ei ddarparu cyn gynted a phosib / A Welsh version of the submission will be provided in due course.

Cofion/ Regards,
Manon

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Mae cynnwys y neges e-bost hon yn cynrychioli sylwadau'r gyrrwr yn unig ac nid o angenrheidrwydd yn cynrychioli sylwadau Cyngor Sir Ynys Mon. Mae Cyngor Sir

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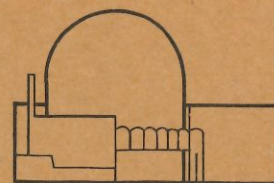
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Wylfa B

**PROPOSED WYLFA 'B'
PWR POWER STATION**

**ENVIRONMENTAL
STATEMENT**

**CENTRAL ELECTRICITY GENERATING BOARD
(NATIONAL POWER DIVISION)**

April 1989

CHAPTER 15
SOCIO-ECONOMIC EFFECTS

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CHAPTER 15 - SOCIO-ECONOMIC EFFECTS

INTRODUCTION

- 15.1 The proposed PWR development would affect employment, accommodation, local services, cultural heritage, tourism and recreation and the local economy. Travers Morgan Economics (TME) has been commissioned to study these socio-economic effects (Reference 5). This chapter presents a summary of these effects and the CEGB's proposals.
- 15.2 TME's research has concentrated on the local impacts of power station development. No single definition of local is meaningful in considering all topics: for employment and accommodation the districts of Anglesey and Arfon are considered; for cultural heritage, the effects upon the character of North Wales are analysed; and for the wider economic effects the county of Gwynedd is studied.

EMPLOYMENT EFFECTS

Existing Employment Situation

- 15.3 The size of the local labour market is defined by the number of economically active individuals, those people in employment or looking for work. According to the 1981 Census 46,900 economically active individuals lived in the districts of Anglesey and Arfon, or 53% of the total for Gwynedd as a whole.
- 15.4 Department of Employment statistics indicate that in April 1988 unemployment in Gwynedd stood at 12,101, Anglesey and Arfon together accounting for 5161 of the male and 2260 of the female unemployed. Table 15.1 shows a breakdown of unemployment by age group and sex.

Table 15.1 Unemployment by Age Group and Sex - April 1988

	Under 17	17-19	20-29	30-39	40-49	50-59	60 and Over	Total	Male	Female
Gwynedd	204	1349	3983	2259	1861	2214	231	12101	8307	3794
Arfon	60	365	1183	639	530	536	54	3367	2427	940
Anglesey	89	456	1335	793	628	693	60	4054	2734	1320

Source: Department of Employment and Manpower Intelligence Unit.

Project Requirements

Construction Stage

- 15.5 The construction of a nuclear power station provides employment for people with all levels of skill and experience, from unskilled to specialist staff. Many of the highly skilled or specialised positions would necessarily be filled by existing employees of the CEGB or its contractors with the remaining positions being filled by people recruited especially for the Wylfa project.
- 15.6 To analyse the local socio-economic effects of the project it is necessary to consider all those employed on the site. This number would vary during the construction phase, with an estimated peak of 3500 in the fourth year of the main works. The site workforce can be divided into broad categories according to the type of work in which they would be engaged. The number of people in each category would vary as the construction progresses, for example the peak for civil operatives would occur in year 2 whereas the peak for mechanical and electrical operatives would be in year 4. Table 15.2 indicates the composition of the workforce in years 2 and 4.

Table 15.2 Composition of the PWR Construction Workforce

Workforce Category	Civil Peak (Year 2)	Total Peak (Year 4)
Site Services & Security & Clerical Staff	400	360
Supervisory/Managerial & Professional Staff	600	490
Civil Operatives	1100	600
Mechanical & Electrical Operatives	800	2050
TOTAL	2900	3500

Operational Stage

- 15.7 When fully operational, Wylfa 'B' would provide 470 permanent jobs, Table 15.3 gives the expected composition of the workforce. In addition, a workforce of about 300 would be employed at the station over a period of up to 4 months periodically for repairs, refuelling and maintenance.

Table 15.3 Composition of the PWR Operational Workforce
(fully operational station)

Workforce Category	Number
Managerial & Technical	110
Clerical & Administrative	30
Industrial	330
TOTAL	470

Effects Upon the Local Labour Market

Construction Stage

- 15.8 Experience at other power station sites suggests that at Wylfa the majority of site security and clerical jobs (320 out of the 360 in year 4) would be filled by local people. A lower proportion of managerial/supervisory staff positions would be filled from the locality, because of the skill and experience required.
- 15.9 There is a history of major construction projects in Gwynedd, the most recent of which are the A55(T) and the construction of the pumped storage power station at Dinorwig. Given this experience and the level of unemployment, it is estimated that, in year 2, between 550 and 650 of the civil jobs would be filled by people from the districts of Anglesey and Arfon, reducing to 420-460 in year 4.
- 15.10 The peak requirement for mechanical/electrical operatives would be 2050, about twice the size of the peak civil workforce. Staff in this category would range from unskilled to skilled craftsmen, with an average skill level higher than that needed for the civil works. In year 4 of construction when the peak mechanical/electrical requirements occur it is estimated that 720-880 staff in this category would be local people.

- 15.11 It is therefore estimated that at the construction peak between 1520 and 1790 employees (mid value 1655) would be from the districts of Anglesey and Arfon, compared with the April 1988 unemployment figures of 5161 males and 2260 females. The remaining 1710-1980 employees (mid value 1845) would be from outside this area.

Operational Stage

- 15.12 When fully operational, Wylfa 'B' would employ about 470 permanent staff. Experience from the existing power stations in North Wales is that a large proportion of operational staff are recruited locally. For Wylfa 'B' the proportion from the local population would be boosted by recruits transferring from the existing station. Taking account of these factors it is estimated that 335-375 of the permanent staff would be local people.

Opportunities for Training and Employment

- 15.13 Table 15.2 detailed the composition of the construction workforce. Although the CEEB would directly employ its own managerial, supervisory, clerical and service staff, the majority of the site workforce would be employed by contractors or sub-contractors appointed for the project. Paragraph 15.11 provides current estimates of the number of local residents who would be employed in construction. The contractors' conditions of contract would require that they maximise the use of local labour; their efforts and success in this would be monitored.
- 15.14 The CEEB has long established extensive training provision for its existing staff and for those recruited locally. Whilst not directly responsible for construction workers, it has encouraged contractors and manufacturers to co-operate fully with the Manpower Services Commission (forerunner of the Training Agency) and other training establishments. This policy will continue in order to enable local people to upgrade their skills thereby ensuring greater opportunities of employment. Prior to the start of construction it would establish a Local Employment and Training Committee such as the one operating successfully at Sizewell 'B'. The committee would be under the chairmanship of the CEEB and would have representatives from the main site contractors, local planning and educational authorities, relevant training boards and the Training Agency. The committee would receive regular reports about the manpower requirements of the Wylfa 'B' contractors, by number, skill and duration; identify maximum local job opportunities and monitor the matching of local applicants to posts; receive regular reports about the availability of local relevant education and training and endeavour to ensure that these relate to job opportunities on the site.

ACCOMMODATION EFFECTS

Requirement

Construction Stage

- 15.15 As noted in paragraph 15.11, it is expected that about 1845 workers would be from outside the districts of Anglesey and Arfon which forms the Daily Commuting Zone. Given the present infrastructure improvements in North Wales, it is anticipated that approximately 200 of these people may choose to commute daily from further afield within North Wales. Consequently, approximately 1645 workers are expected to move into the locality, about 310 with their families, resulting in an additional demand for an equivalent number of accommodation units.

Operational Stage

- 15.16 Experience from other operational stations indicates that the owner occupation rate among permanent staff would be above the national average. As noted in paragraph 15.12 it is expected that of the 470 permanent staff, 115 would expect to relocate into the area. Allowing for 10% who may decide to travel from further afield, an expected demand of an additional 105 accommodation units is anticipated, 70% of which is expected to be for owner occupation. The workers involved in periodic maintenance and refuelling would place a maximum demand of about 300 on the serviced accommodation sector.

Effects Upon the Accommodation Market

- 15.17 North Wales is a well established tourist destination with a significant stock of holiday accommodation, both serviced and non-serviced. Data from the Welsh Tourist Board have been utilised and both serviced and self-catering accommodation have been assessed. Existing caravan and camp sites have been discounted in this analysis; however the CEGB, in consultation with the local authorities, would wish to provide a purpose-built caravan site, with about 60 pitches, to meet the anticipated demand from accompanied workers.

Construction Stage

- 15.18 Table 15.4 indicates the expected usage of the various types of accommodation, derived from research in the locality and experience from other power station construction sites.
- 15.19 The estimated requirement for owner-occupation is 256 properties. County Council population projections assume an annual net in-migration for Anglesey of 200-617 people per year. Should these projections be realised, there may be insufficient housing stock to meet the demand in the construction phase. This may encourage some workers to seek other forms of accommodation.

- 15.20 It is estimated that 76 construction workers would seek accommodation in the private rented sector. A demand for this number of units would constitute only a small proportion of the private rented household sector in Anglesey and Arfon. Consequently, it is not expected that such demand would present a strain on this sector.
- 15.21 It is expected that the remaining 1255 individuals would seek accommodation in the serviced sector. Although there is adequate tourist accommodation, the potential for displacement of tourists exists especially during the peak months of May to October. Data from the Welsh Tourist Board indicate a hotel occupancy rate in Gwynedd during the 1986 tourist season (May to October) ranging from 53% to a peak, in August, of 74%.
- 15.22 In order to minimise the potential displacement of tourists the CEGB proposes to provide a good quality residential hostel, initially for 600 workers, extendible if necessary to 800. The CEGB's experience of other power station projects indicates that the best location for such a hostel is adjacent to the site. This reduces traffic on the roads and, at Wylfa, has cultural advantages (see paragraph 15.32). The hostel would also be an additional source of local employment.

**Table 15.4 Expected Accommodation Requirements
at Construction Peak (Year 4)**

Accommodation Type	Number
Owner Occupation	256
Private Rented	76
Site Hostel	726
Hotels/Lodgings	529
Caravans etc.	58
TOTAL	1645

Operational Stage

- 15.23 The number of permanent staff expected to move into the area would place a lower demand on owner-occupied property than at the peak of construction. As the number of construction workers reduces the operational workforce would build up. Accordingly no strain is anticipated on the local accommodation market resulting from the needs of the operational staff. The temporary workers required on site periodically for maintenance and refuelling purposes could be accommodated in local serviced accommodation without difficulty.

EFFECTS UPON LOCAL SERVICES

Educational Facilities

- 15.24 Gwynedd County Council operates a bilingual policy in all its schools and further education establishments. The aim is to develop the ability of pupils and students within the County to be confidently bilingual and to become full members of the County's bilingual society. All educational establishments within the County reflect and reinforce the language policy in their administration, their social life as well as in their academic provision. Primary schools aim to ensure that all children, whether they be from Welsh or English speaking homes, can speak, read and write fluently and confidently in both Welsh and English by the time they transfer to secondary school. At secondary schools, pupils study Welsh and English as subjects up to the end of the fifth year and all pupils who are capable sit appropriate external examinations in both subjects. Both languages are also used as a medium for learning in varying degrees according to the need of each individual.
- 15.25 To assist in the assimilation of non-Welsh speaking children, 6 language centres have been established at Llangefni, Caernarfon, Botwnnog, Llangybi, Dolgarrog and Penrhyndeudraeth. These centres cater for children between 7 and 11, who spend one term in the special unit in order to gain proficiency in the language. At the secondary level, the non-Welsh speaking incomer poses assimilation problems both because of the Welsh atmosphere and 'culture' of many of Gwynedd's secondary schools and in the classroom where much of the instruction is through the medium of Welsh.
- 15.26 The peak demand for additional school places arising from the Wylfa 'B' project is estimated to be 250 and would occur during the construction phase. Falling rolls within the schools in Gwynedd will enable the Education Authority to remove temporary substandard accommodation from schools. After the removal of this accommodation there will still be spare capacity at some schools and accommodating extra children would not present a problem at these schools. However, in others, it is not expected that there will be any spare capacity and extensions would be necessary at these schools if there is any significant increase in the demand for places. The CEEGB would wish to discuss the provision of additional facilities with the Education Authority.

Health Service Facilities

- 15.27 Discussions with the Gwynedd Health Authority indicate that present community services (i.e. GPs, health visitors, home nurses, maternity and child health facilities) would provide for in-coming workers and their families. The CEEGB would provide sufficient on-site cover, both at the construction site and the hostel, for routine medical attention and immediate first aid needs arising from accidents.

Other Local Authority Services

- 15.28 The CEGB will continue discussions with the local authorities concerning any effects upon police, fire, ambulance and other services resulting from the 'B' station proposals. No significant effects are expected.

EFFECTS UPON THE CULTURAL HERITAGE

Extent and Distribution of the Welsh Language

- 15.29 According to 1981 census statistics, Gwynedd has a higher proportion of Welsh speakers than any other county. Furthermore the decrease in numbers using the language between 1971 and 1981 was less in Gwynedd than any other rural county. The number of Welsh speakers in each District of Gwynedd in 1971 and 1981 is given in Table 15.5. There was a 5.6% increase between 1971 and 1981 in the numbers speaking Welsh in Anglesey but a decrease in the overall proportion from 66% to 61%. The proportion in Arfon remained steady at 75%.

Table 15.5 Changes in Enumerated Population Speaking Welsh in Gwynedd, 1971-1981

District	1971		1981		% change 1971-1981
	Number	%	Number	%	
Aberconwy	18 940	39	17 945	35	- 5.3
Arfon	37 830	75	37 461	75	- 1.0
Dwyfor	20 295	82	20 052	79	- 1.2
Meirionnydd	22 080	73	21 037	68	- 4.7
Anglesey	37 135	66	39 229	61	+ 5.6
Gwynedd	136 265	65	135 821	61	- 0.3

Source: 1981 Census, Wales.

- 15.30 Paragraphs 15.24-15.25 outline Gwynedd County Council's policy towards the use of Welsh in education. This bilingual policy means that all children between 5 and 16 receive some of their education through the medium of Welsh.

Potential Cultural Effects

- 15.31 The main potential impact is seen to be the dilution of the Welsh culture. Dilution may take place when non-Welsh speaking persons move into a predominantly Welsh speaking area and the use of the language for every day purposes declines because of the need to take account of non-Welsh speaking persons.
- 15.32 Approximately 1650 workers, at the construction peak, are expected to migrate into the locality. Although some of these would move from elsewhere within North Wales, it is likely that most would be non-Welsh speakers. The majority of those coming into the locality would be unaccompanied males who would seek serviced accommodation. In order to minimise the displacement of tourists in the peak summer months, a residential hostel would be built. Concentration of workers in a hostel would reduce the numbers of non-Welsh speakers living in local communities and the resultant cultural impact would be minimised and temporary.
- 15.33 The longer term culture-related effects are difficult to evaluate. With a proportion of the local workforce trained and having acquired a number of construction skills, some may decide to move elsewhere unless alternative employment is available locally. On the other hand, the direct and indirect jobs provided by the construction and operation of the proposed power station may encourage local people who would otherwise have moved to stay in the area. Similarly some locally-born people who have already moved may return to the area to take advantage of the opportunities presented by this project. Additionally, the existence of a skilled workforce and the service requirements of the station could have the effect of attracting new businesses to relocate into the area.

EFFECTS UPON TOURISM AND RECREATION

- 15.34 During the last two decades, tourism has become one of Wales's most important industries and is continuing to grow. Increasingly, the tourism and leisure industries are being regarded as important elements in regional development. In 1987, 4 million trips were made to the North Wales tourism area (comprising Clwyd and most of Gwynedd), representing 35% of all trips in Wales. Tourist expenditure in the same year was valued at £216 million, accounting for 37% of all tourist expenditure in Wales.
- 15.35 A 1984 Census of Employment indicated that nearly 8,000 people were employed in tourism and recreation in Gwynedd, accounting for about 12% of employment. In addition to these jobs, the industry improves the viability of establishments in many other sectors, e.g. retail, agriculture, public transport.
- 15.36 Tourism is an important part of the economy of Anglesey. Wylfa power station is one of the island's tourist attractions and has over 15000 visitors per year. The facilities at Wylfa include an information centre, from which tours of the power station are available, an observation tower, a nature trail and a picnic area.

- 15.37 The proposed PWR station would potentially be a major tourist attraction. Any tourist development would have the added advantage of creating additional employment for local people and injecting further money into the local economy.
- 15.38 Anglesey has a wide range of recreational facilities with emphasis on out-door water recreation. The likely impact of the construction workforce would be small as recreational facilities would be incorporated into the proposed hostel accommodation.

WIDER ECONOMIC EFFECTS

Introduction

- 15.39 In addition to direct employment effects discussed previously, a large project such as a PWR will have a number of secondary effects upon the local economy. For the purpose of assessing the indirect economic impacts the local economy of Gwynedd has been considered.
- 15.40 The method by which the net input into the local economy is quantified is by the use of a multiplier model. This is based on the fact that an element of the initial income injection would be spent in the local area, which would generate additional income in this area. Part of this additional income would again be spent in the locality and so on. The multiplier is not infinite, however, because the economy is an 'open' one and there are 'leakages' out of the system.

Income Injection

Construction Stage

- 15.41 The CEEGB would wish to see local firms reap maximum benefit from the construction of the power station. As at Sizewell, a Register of local contractors would be compiled and the contract letters for each main contractor would include the statement that "main contractors shall include suitable local contractors and suppliers in their tender enquiries".
- 15.42 It is estimated that the initial injection into the local economy over the construction period would amount to some £250-£300 million. This will mainly be in employees' wages and salaries but also through expenditure on local services and the use of local contractors and suppliers.
- 15.43 In addition to the direct employment effects discussed previously, jobs would be created as a result of the indirect income and induced investment generated by the multiplier. It is estimated that the potential number of jobs indirectly created would range from 770 to 1715 at the overall construction peak. The extent to which these jobs would be filled by local people would be dependent upon the availability of skills within the locality and the interest shown by local firms.

Operational Stage

- 15.44 The existing power station makes a significant contribution to the local economy through wages and local contracts and purchases. It is estimated that, when operational, Wylfa 'B' would directly contribute over £7 million per year and that the indirect effects of that expenditure would add a further £2 million per year.

SOCIAL BENEFITS

- 15.45 At Sizewell 'B', the CEGB has provided a social benefit fund to improve local facilities. Donations are being made to a variety of local causes. In the same way, the CEGB's social policy would be implemented at Wylfa.

CONCLUSIONS

- 15.46 The analysis summarised in this chapter stems from the estimate that, at peak, 1645 workers would move into the area (see paragraph 15.15). However, the CEGB will encourage measures to enhance the number of local people employed on the project (see paragraph 15.14). Should a higher number of local people in fact gain employment, the effects on accommodation, local services, cultural heritage and tourism and recreation would be correspondingly less.
- 15.47 The construction and operation of the proposed Wylfa 'B' power station would bring significant economic benefits to both Anglesey and Gwynedd, with an estimated £250-£300 million being injected into the local economy over the course of the construction period. The workforce on site is estimated to peak at 3500, the majority of whom would be drawn from North Wales.
- 15.48 Good quality hostel accommodation for up to 600-800 individuals would be provided as part of the project. This would prevent displacement of tourists in the peak summer months and avoid the need to assimilate large numbers of construction workers into local communities.
- 15.49 The CEGB recognises the cultural heritage of North Wales and commissioned research to assess the potential effects which may arise from its proposals. The main cultural effect would be the dilution of language arising from non Welsh-speakers moving into a predominantly Welsh-speaking area. However, the creation of local employment and the boosting of the local economy would have off-setting effects such as encouraging local people to stay who would might otherwise have moved and encouraging some who have already moved to return.