

From: [Jones Gareth \(AMG\)](#)
To: [Wylfa Newydd](#)
Subject: YML/FW: Adroddiad Datganiad o Effaith Lleol / Statement of Local Impact Report - Cyngor Gwynedd
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Attachments: [Atodiad 2 - Appendix 2 Gwynedd Wylfa Newydd Papur Dadleoli - Displacement Paper 1.0..pdf](#)
[Atodiad 3 - Appendix 3 - Twristiaeth - Tourism STEAM DATA.pdf](#)
[Atodiad 4 - Crynodeb Gweithredol Adolygiad Digartrefedd Gwynedd.pdf](#)
[Appendix 4 Gwynedd EXEC Summary Homelessness Review.pdf](#)
[Atodiad 5 - Appendix 5 Adroddiad Effaith Wylfa Newydd - Impact Report .pdf](#)
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Yr Arolygiaeth Gynllunio / The Planning Inspectorate

Cynllunio Seilwaith Cenedlaethol / National Infrastructure Planning

4 Rhagyr / 4 December 2018

Annwyl Syr / Fadam

Parthed: Cais DCO ar gyfer gorsaf niwclear Wylfa Newydd
Adroddiad Datganiad o Effaith Lleol gan Gyngor Gwynedd

Atodir adroddiad datganiad o effaith lleol a gyflwynir ar ran Cyngor Gwynedd ynglŷn a'r uchod yn unol ac amserlen yr archwiliad.

Yn gywir,

Gareth Jones
Uwch Reolwr Gwasanaeth Cynllunio a Gwarchod y Cyhoedd

Dear Sir / Madam,

Reference: DCO application for Wylfa Newydd Power Station
Statement of Local Impact Report by Gwynedd Council

Please find attached a statement of local impact report submitted on behalf of Gwynedd Council in respect of the above in accordance with the timetable for the examination.

Yours faithfully,

Gareth Jones
Senior Manager, Planning and Public Protection Service

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The Potential Displacement Impact of the Construction of Wylfa Newydd on Gwynedd

Draft Report

Prepared for Gwynedd Council

November 2018

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Executive Summary

Context

- i. Horizon Nuclear Power has set out a peak demand for around 2,000 home-based workers for the construction of Wylfa Newydd from within the 90-minute Daily Construction Commuting Zone (DCCZ). Horizon expects that 265 of these will come from Menai Mainland, and 77 from the rest of Gwynedd that is in the DCCZ, so 342 in total from Gwynedd. These are broken down into the main occupation groups in the figure below.
- ii. Up to an additional 1,800 multiplier jobs will be created across the DCCZ. However, the actual number is not known, and the location of these workers is not known, but some may be based in Gwynedd. Given the uncertainties about the level and nature of this demand at this stage, it cannot be considered in any detail.

Figure 1: Demand for Home-Based Labour in Gwynedd

Occupation	Demand in Menai Mainland	Demand in Gwynedd Part of Rest of Mainland DCCZ
Site Services, Clerical & Security	104	19
Managerial & Supervisory	31	12
Civils Operatives	82	28
M&E Operatives	25	10
Operational	23	8
TOTAL	265	77

Source: Horizon (2018) Document 6.3.9 Table 3.4 and HJA analysis (based on employment data from ONS BRES 2016)

Displacement

- iii. Meeting this demand for home-based workers could lead to a displacement effect in the Gwynedd economy where displacement is defined as: “*The proportion of intervention outputs/outcomes accounted for by reduced outputs/outcomes elsewhere in the target area.*” There is a risk that employees may be displaced from established businesses in Gwynedd, which will create a cost for the business to replace them, with a risk that they cannot be replaced which will mean a longer-term negative impact.
- iv. We consider whether the demand for home-based workers can be met from the unemployed, and if not, what impact this demand could have on employment in Gwynedd.

Can the demand for workers at Wylfa Newydd be met from JSA claimants?

- v. JSA claimants are the unemployed who: enter into a Jobseeker’s agreement and sign a declaration that they are out of work, capable of, available for and actively seeking work during the week in which their claim is made.

- vi. There are significantly more JSA claimants in Gwynedd with experience in the Site Services, Clerical & Security occupations than there is demand for home-based workers from within Gwynedd. However, the majority of these JSA claimants have previous experience as Sales & Retail Assistants, so may not have suitable skills or experience to fill these roles.
- vii. There is greater demand for Civils Operatives from Gwynedd than there are suitable JSA Claimants in Gwynedd.
- viii. There are no JSA claimants with skills and experience in Mechanical & Electrical trades, so this demand cannot be met from JSA claimants in Gwynedd.
- ix. The two figures below show firstly a numerical comparison of the demand for home-based workers and the number of JSA claimants with suitable skills and experience in Gwynedd, and the second figure then shows a percentage comparison.

Figure 2: Comparing Demand and JSA Claimants

Occupation	Demand for home-based labour in Menai Mainland	JSA Claimants in Menai Mainland	Demand for home-based labour in the Gwynedd Part of Mainland DCCZ	JSA Claimants in Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	104	420	19	80
Civils Operatives	82	40	28	10
M&E Operatives	25	0	10	0

Figure 3: Comparing Demand and JSA Claimants

Occupation	JSA claimants as % of demand for home-based labour in Menai Mainland	JSA claimants as % of demand for home-based labour in Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	25%	24%
Civils Operatives	205%	280%
M&E Operatives	n/a	n/a

Can the demand for workers at Wylfa Newydd be met from those in employment?

- x. For Site Services, Clerical & Security roles, the demand for home-based workers from Gwynedd could be met by taking 2% of those employed in Menai Mainland and 1% of those employed in the rest of the Gwynedd part of the mainland DCCZ. For Civils Operatives the figures are slightly higher at 3% of those employed in Menai Mainland and 2% of those employed in the rest of the Gwynedd part of the mainland DCCZ. However, the percentages are higher for Mechanical & Electrical Operatives, requiring 13% of those employed in Menai Mainland and 5% of those employed in the rest of the Gwynedd part of the mainland DCCZ.

- xi. Whilst the percentages for Site Security, Clerical & Security roles and Civils Operatives do not appear high, it is worth noting that there has been no measurable increase in total employment in Gwynedd between 2015 and 2017, so it could be difficult to replace workers who are displaced from existing jobs. This will be even more significant for Mechanical & Electrical Operatives, where the percentage of employees lost is higher.
- xii. The two figures below show firstly a numerical comparison of the demand for home-based workers and the number of employees with suitable skills and experience in Gwynedd, and the second figure then shows a percentage comparison.

Figure 4: Comparing Demand and Current Employment

Occupation	Demand for home-based labour in Menai Mainland	Employment in Menai Mainland	Demand for home-based labour in the Gwynedd Part of Mainland DCCZ	Employment in the Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	104	5,060	19	2,360
Civils Operatives	82	2,450	28	1,495
M&E Operatives	25	200	10	220

Figure 5: Comparing Demand and Current Employment

Occupation	Demand as % of Employment in Menai Mainland	Demand as % of Employment in the Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	2%	1%
Civils Operatives	3%	2%
M&E Operatives	13%	5%

The potential impact of the construction of Wylfa Newydd on commuting from Anglesey to Gwynedd

- xiii. A significant number of residents of Anglesey commute into Gwynedd (in particular the Menai Mainland part of Gwynedd) to work each day. Anglesey and Menai Mainland are both part of the Holyhead and Bangor Travel to Work Area (TTWA) defined by the ONS, so it is expected that people will travel to work within this area. The latest small-area commuting data is derived from the Census of Population, 2011.
- xiv. Some 6,332 people travel each day from Anglesey to Menai Mainland for work. The total number of people working in Menai Mainland (in 2011) is 28,681. Therefore, 22% of the total number of people working in Menai Mainland travel from Anglesey daily.
- xv. 316 people travel daily from Anglesey to the Rest of DCCZ Gwynedd. The total number of people working in the Rest of DCCZ Gwynedd in 2011 was 12,013. So, 3% of those working in the Rest of DCCZ Gwynedd commute in from Anglesey.

- xvi. Horizon expects to employ 1,256 home-based workers from Anglesey. These are in a range of occupations. There are too few JSA claimants in Anglesey to meet the demand for workers in the main categories of Site Services, Clerical & Security, Civils Operatives, and Mechanical & Electrical Operatives. If the expected demand for home-based workers in Anglesey is met from current employment in Anglesey then it will lead to high levels of displacement.
- xvii. Therefore, employment of home-based workers from Anglesey may displace people who live in Anglesey and work in Gwynedd. 22% of people working in Menai Mainland commute daily from Anglesey, and 3% of those who work in the Rest of DCCZ Gwynedd. However, the largest part of the demand for home-based workers at Wylfa Newydd is for Skilled Trades Occupations, which comprise only a small part of the commuters from Anglesey, particularly to Menai Mainland (i.e. 6% of those that commute daily from Anglesey to Menai Mainland).

1 Context

1.1 The Construction of Wylfa Newydd

- 1.1.1 Horizon Nuclear Power's Development Consent Order (DCO) application submitted in 2018 states that there will be up to 9,000 workers in the local area at the peak of the construction process (see Horizon Nuclear Power (2018) Wylfa Newydd Project 6.3.1 ES Volume C – Project Wide Effects C1 – Socio-Economics, and accompanying documents).
- 1.1.2 2,000 (or possibly slightly more) of these will be home-based workers that live in the Daily Construction Commuting Zone (DCCZ) defined by Horizon i.e. within 90 minutes travel time from the site. Some of these home-based workers will be new entrants to the labour market and some will not currently be working. However, a significant proportion of the home-based workers are likely to already be working in local businesses. If existing workers are attracted to Wylfa Newydd there will be some cost to local businesses to recruit and train their replacements. However, there is a concern that shortages of available workers may mean that some workers cannot easily be replaced.
- 1.1.3 In addition to the 8,500 to 9,000 workers on the main project, an additional 1,800 multiplier jobs in the supply chain has been suggested within the DCCZ, as stated in the DCO application: *Applying a construction sector employment multiplier of 1.9 to calculate indirect and induced employment, it is estimated that a further 1,800 jobs, in addition to the estimate of 2,000 mentioned above, would be created in the DCCZ as a result of the direct employment opportunities* (Horizon, 2018, Document 6.3.1 para 1.5.9)
- 1.1.4 If these are genuine multiplier jobs then they are additional to those already in existence, so will stimulate significant additional demand for labour. The direct demand for home-based labour plus the 1,800 multiplier jobs will mean a project-driven demand for around 4,000 home-based workers in the DCCZ. However, Horizon is unable to provide further data on this potential area of impact, so it cannot be considered further at this stage.
- 1.1.5 The geography of the construction impact will be most concentrated in Anglesey and the local Travel to Work Area (TTWA), but will be felt throughout the 90-minute drive time area, or DCCZ. Horizon has provided a breakdown of where they expect this demand to come from. It is notable that Horizon provides two sets of data – one which shows local labour demand of up to 2,250 at peak; but when this is broken down to local areas, this is taken as 2,000 people at peak.
- 1.1.6 Horizon's DCO application shows a range of scenarios for the employment of home-based workers (of between 15% and 22% of the total workforce at peak¹), which is shown in the figure below; but only one of these is broken down into the lower geographical areas that allows consideration of Gwynedd (that is the 22% home-based workers scenario).

¹ Horizon (2018) Document 6.3.9 Wylfa Newydd Project ES Volume C Project-Wide Effects: Socio-Economic Technical Appendix para 2.4.38 to 2.4.31

Figure 1.1: Total Labour Demand and Local Labour Content at Peak

Occupation	Total Demand at Peak	Local Labour Content at Peak
Site Services, Clerical & Security	902	689 - 812 (76% - 90%)
Managerial & Supervisory	1,998	26 - 237 (1% - 12%)
Civils Operatives	3,069	134 - 717 (4% - 23%)
M&E Operatives	2,580	68 - 362 (3% - 14%)
Operational	451	191 - 226 (42% - 50%)
TOTAL	9,000	1,350 - 2,250 (15% - 25%)

Source: Horizon (2018) Document 6.3.9 Table 2.8

Figure 1.2: Geographical Breakdown of Demand for Home-Based Labour

Occupation	Total (22% scenario)	Demand in Anglesey	Demand in Menai Mainland	Demand in Rest of Mainland DCCZ
Site Services, Clerical & Security	690	467	104	119
Managerial & Supervisory	236	131	31	74
Civils Operatives	675	417	82	176
M&E Operatives	208	123	25	60
Operational	191	118	23	50
TOTAL	2,000	1,256	265	479

Source: Horizon (2018) Document 6.3.9 Table 3.4

Displacement

- 1.1.7 Displacement is a potential negative impact of the construction of Wylfa Newydd. Guidance on calculating the displacement effect of major projects is set out in Government guidance². It defines displacement as: “*The proportion of intervention outputs/outcomes accounted for by reduced outputs/outcomes elsewhere in the target area.*” (para 4.3.1, p.28). The guidance then goes on to say that “*Displacement arises where the intervention takes market share (called product market displacement) or labour, land or capital (referred to as factor market displacement) from other existing local firms or organisations.*” (para 4.3.2 p.28) [our emphasis in bold].
- 1.1.8 It is the displacement of workers from existing local businesses and other organisations that is of greatest concern with the construction of Wylfa Newydd, but there may also be displacement of goods and materials, tourism impact, and the displacement of specialist skills such as Welsh language skills from parts of the local economy.

1.2 Gwynedd

- 1.2.1 In the context of the demand for home-based workers for the construction of Wylfa Newydd, Gwynedd can be broken down into three parts:
- Menai Mainland. This is roughly the part of the Holyhead and Bangor TTWA that is in Gwynedd

² Homes & Communities Agency (2014) Additionality Guide: Fourth Edition

- The rest of Gwynedd that is within the DCCZ (i.e. within 90 minutes travel-time of Wylfa Newydd)
- That part of Gwynedd that is outside the DCCZ

1.2.2 In this analysis we consider the impact on Menai Mainland and the Rest of DCCZ Gwynedd.

2 Demand for and Supply of Home-Based Workers in Gwynedd

2.1 Demand for Workers from Gwynedd

- 2.1.1 Data on the geographical breakdown of demand for home-based labour is taken from the Horizon DCO application, and is shown in the previous section. The demand for workers from Menai Mainland is set out in the Horizon DCO. However, the demand for workers from the rest of Gwynedd is not set out by Horizon, so needs to be calculated. The proportion of demand from Gwynedd has been calculated as a part of the total demand for home-based labour from the Rest of Mainland DCCZ. The method for calculating the demand in Gwynedd is set out in Appendix A to this paper.

Figure 2.1: Demand for Home-Based Labour including in Gwynedd

Occupation	Total	Demand in Menai Mainland	Demand in Rest of Mainland DCCZ	Demand in Gwynedd Part of Rest of Mainland DCCZ
Site Services, Clerical & Security	690	104	119	19
Managerial & Supervisory	236	31	74	12
Civils Operatives	675	82	176	28
M&E Operatives	208	25	60	10
Operational	191	23	50	8
TOTAL	2,000	265	479	77

Source: Horizon (2018) Document 6.3.9 Table 3.4 and HJA analysis (based on employment data from ONS BRES 2016)

- 2.1.2 Of course, if the demand for workers cannot be met in other places, most particularly in Anglesey, the demand for workers from Gwynedd could increase.
- 2.1.3 For the purposes of this analysis we have focused on Site Services, Clerical & Security, Civils Operatives and Mechanical & Electrical Operatives because they are three of the larger occupational groups, Horizon has provided good definitions of these occupations, and they are sufficiently focused to be able to match supply and demand. The Managerial & Supervisory category is too broad to meaningfully match supply and demand, and the operational category involves permanent jobs rather than temporary jobs during the construction period only.

2.2 Supply of Labour in Gwynedd

- 2.2.1 The main sources of workers are that could fill the demand for home-based workers created by the construction of Wylfa Newydd are:
- New entrants to the workforce (e.g. school, college and university leavers)
 - Those who are unemployed
 - The economically inactive
 - Those already working

- 2.2.2 We have not collected data on new entrants to the workforce each year. This is not available from ONS, but could be collected from local sources. However, the workforce of Gwynedd has been stable over the period from 2015 to 2017 (i.e. no change can be identified in the numbers of employees or employment in Gwynedd shown in the ONS Business Register & Employment Survey, given the level of rounding applied to this data by ONS). Therefore, over this period the number of new entrants must be roughly the same as the number of people leaving the workforce (e.g. retiring). This means that there is not an excess of new entrants to the workforce who can help to meet the demand for workers from Wylfa Newydd.
- 2.2.3 Whilst it is possible to gather data on the economically inactive, it is unlikely that many, if any, of these will have the skills, experience or desire to work on the Wylfa Newydd project. Although there are some fluctuations, the economic inactivity rate and absolute number in Gwynedd has fallen since 2014, so there are fewer economically inactive people that could be brought into the workforce. We have not considered these within this analysis.
- 2.2.4 To identify the capacity of the Gwynedd labour force to meet the demand from Wylfa Newydd, we first look at the pool of available unemployed workers.
- 2.2.5 The broadest measure of the unemployed is the International Labour Organisation (ILO) measure of the unemployed. This is measured by a sample-based survey. According to the ONS: *Under ILO guidelines, anybody who is without work, available for work and seeking work is unemployed. The UK applies this as anybody who is not in employment by the above definition, has actively sought work in the last 4 weeks and is available to start work in the next 2 weeks, or has found a job and is waiting to start in the next 2 weeks, is considered to be unemployed.*
- 2.2.6 Claimants of Job Seekers Allowance are a sub-set of the ILO unemployed. The JSA claimant count is the number of people receiving JSA (i.e. not a survey). This is a stricter definition of unemployment and method of data collection than the ILO measure, and so gives a better picture of the number of people who are genuinely seeking work. According to the ONS: *Those claiming JSA enter into a Jobseeker's agreement and sign a declaration that they are out of work, capable of, available for and actively seeking work during the week in which their claim is made.*

JSA Claimants

- 2.2.7 The JSA claimant count can be broken down by occupation, so we are able to build a reasonably good picture of people with the skills and experience suited to the demand for labour from Wylfa Newydd.

Figure 2.2: Number of JSA Claimants in Gwynedd

Occupation	Menai Mainland	Rest of Mainland DCCZ	Gwynedd Part of Rest of Mainland DCCZ (actual, not modelled)
Site Services, Clerical & Security	420	1,010	80
Civils Operatives	40	55	10
M&E Operatives	0	0	0

Source: ONS Job Seekers Allowance by Occupation, June 2018

All people in employment

Figure 2.3: Employment

Occupation	Menai Mainland	Rest of Mainland DCCZ	Gwynedd Part of Rest of Mainland DCCZ (actual, not modelled)
Site Services, Clerical & Security	5,060	18,220	2,360
Civils Operatives	2,450	9,060	1,495
M&E Operatives	200	1,200	220

ONS Business Register and Employment Survey, 2016

2.3 Comparison of Demand and Supply

JSA Claimants

- 2.3.1 There are significantly more JSA claimants with experience in the Site Services, Clerical & Security occupations than there is demand for home-based workers from within Gwynedd. However, the majority of these JSA claimants have previous experience as Sales & Retail Assistants, so may not have suitable skills or experience to fill these roles.
- 2.3.2 There is greater demand for Civils Operatives from Gwynedd than there are suitable JSA Claimants in Gwynedd.
- 2.3.3 There are no JSA claimants with skills and experience in Mechanical & Electrical trades, so this demand cannot be met from JSA claimants in Gwynedd.
- 2.3.4 The two figures below show firstly a numerical comparison of the demand for home-based workers and the number of JSA claimants with suitable skills and experience in Gwynedd, and the second figure then shows a percentage comparison.

Figure 2.4: Comparing Demand and JSA Claimants

Occupation	Demand for home-based labour in Menai Mainland	JSA Claimants in Menai Mainland	Demand for home-based labour in the Gwynedd Part of Mainland DCCZ	JSA Claimants in Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	104	420	19	80
Civils Operatives	82	40	28	10
M&E Operatives	25	0	10	0

Figure 2.5: Comparing Demand and JSA Claimants

Occupation	JSA claimants as % of demand for home-based labour in Menai Mainland	JSA claimants as % of demand for home-based labour in Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	25%	24%
Civils Operatives	205%	280%
M&E Operatives	n/a	n/a

Employees

- 2.3.5 For Site Services, Clerical & Security roles, the demand for home-based workers from Gwynedd could be met by taking 2% of those employed in Menai Mainland and 1% of those employed in the rest of the Gwynedd part of the mainland DCCZ. For Civils Operatives the figures are slightly higher at 3% of those employed in Menai Mainland and 2% of those employed in the rest of the Gwynedd part of the mainland DCCZ. However the percentages are higher for Mechanical & Electrical Operatives, requiring 13% of those employed in Menai Mainland and 5% of those employed in the rest of the Gwynedd part of the mainland DCCZ.
- 2.3.6 Whilst the percentages for Site Security, Clerical & Security roles and Civils Operatives do not appear high, it is worth noting that there has been no measurable increase in total employment in Gwynedd between 2015 and 2017, so it could be difficult to replace workers who are displaced from existing jobs. This will be even more significant for Mechanical & Electrical Operatives, where the percentage of employees lost is higher.
- 2.3.7 The two figures below show firstly a numerical comparison of the demand for home-based workers and the number of employees with suitable skills and experience in Gwynedd, and the second figure then shows a percentage comparison.

Figure 2.6: Comparing Demand and Current Employment

Occupation	Demand for home-based labour in Menai Mainland	Employment in Menai Mainland	Demand for home-based labour in the Gwynedd Part of Mainland DCCZ	Employment in the Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	104	5,060	19	2,360
Civils Operatives	82	2,450	28	1,495
M&E Operatives	25	200	10	220

Figure 2.7: Comparing Demand and Current Employment

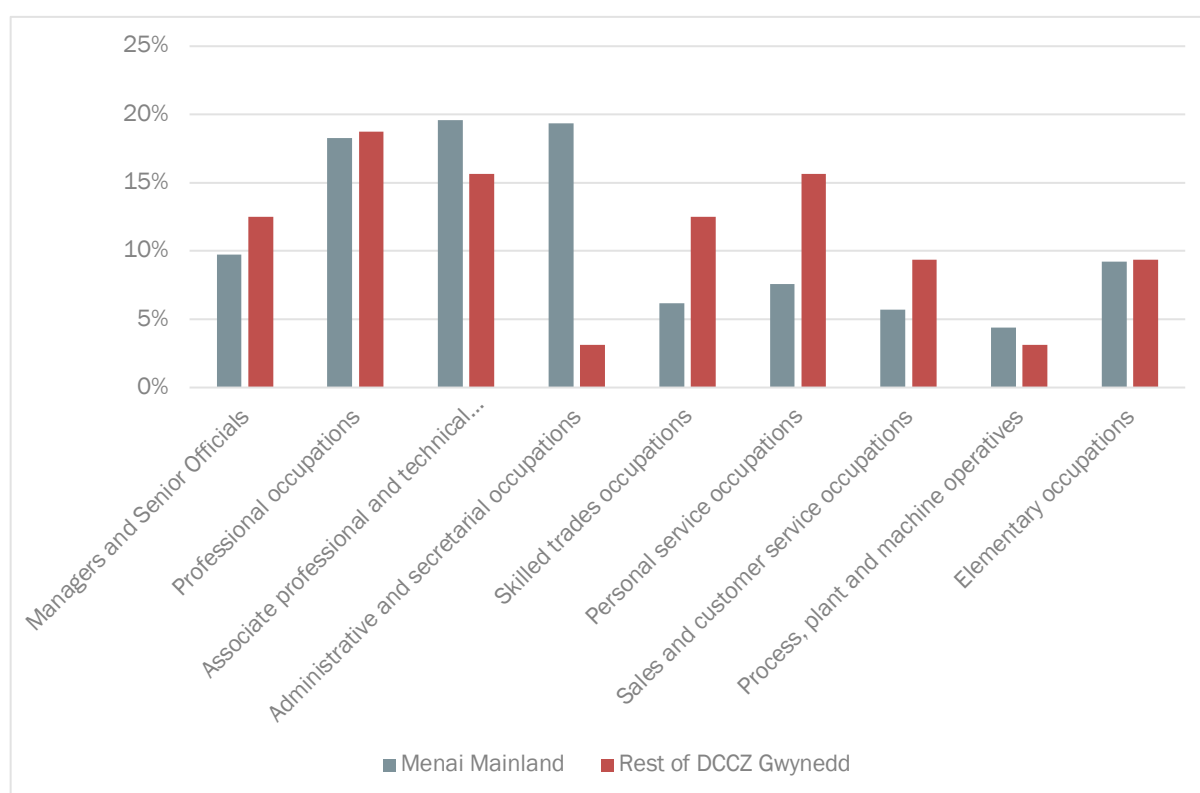
Occupation	Demand as % of Employment in Menai Mainland	Demand as % of Employment in the Gwynedd Part of Mainland DCCZ
Site Services, Clerical & Security	2%	1%
Civils Operatives	3%	2%
M&E Operatives	13%	5%

3 Commuting from Anglesey to Gwynedd

3.1 Level of Commuting

- 3.1.1 A significant number of residents of Anglesey commute into Gwynedd (in particular the Menai Mainland part of Gwynedd) to work each day. Anglesey and Menai Mainland are part of the Holyhead and Bangor Travel to Work Area (TTWA) defined by the ONS, so it is expected that people will travel to work within this area. The latest small-area commuting data is derived from the Census of Population, 2011.
- 3.1.2 Some 6,332 travel each day from Anglesey to Menai Mainland. The total number of people working in Menai Mainland (in 2011) is 28,681. Therefore, 22% of the total number of people working in Menai Mainland travel from Anglesey daily. However, 1,729 people travel daily from Menai Mainland to Anglesey. So, net commuting from Anglesey to Menai Mainland is 4,603 people.
- 3.1.3 316 people travel daily from Anglesey to the Rest of DCCZ Gwynedd. The total number of people working in the Rest of DCCZ Gwynedd in 2011 was 12,013. So, 3% of those working in the Rest of DCCZ Gwynedd commute in from Anglesey. 288 people commute from the Rest of DCCZ Gwynedd to Anglesey. So, net commuting from Anglesey to Rest of DCCZ Gwynedd is 28 people.
- 3.1.4 The Census of Population 2011 does not provide data on the occupations of commuters. However, this data can be found in the Census of Population 2001, albeit that this is 17 years old. The occupational profile of commuters from Anglesey to Menai Mainland and the Rest of DCCZ Gwynedd in 2001 can be seen in the figure below.

Figure 3.1: Occupations of Commuters from Anglesey to Gwynedd, 2001



Source: ONS Census of Population, 2001

- 3.1.5 Most commuters from Anglesey to Menai Mainland are in higher occupational classifications. The spread of occupations commuting to the Rest of DCCZ Gwynedd is broader, but the numbers are smaller.

3.2 Impact of Demand for Home-Based Workers from Anglesey on the Gwynedd Economy

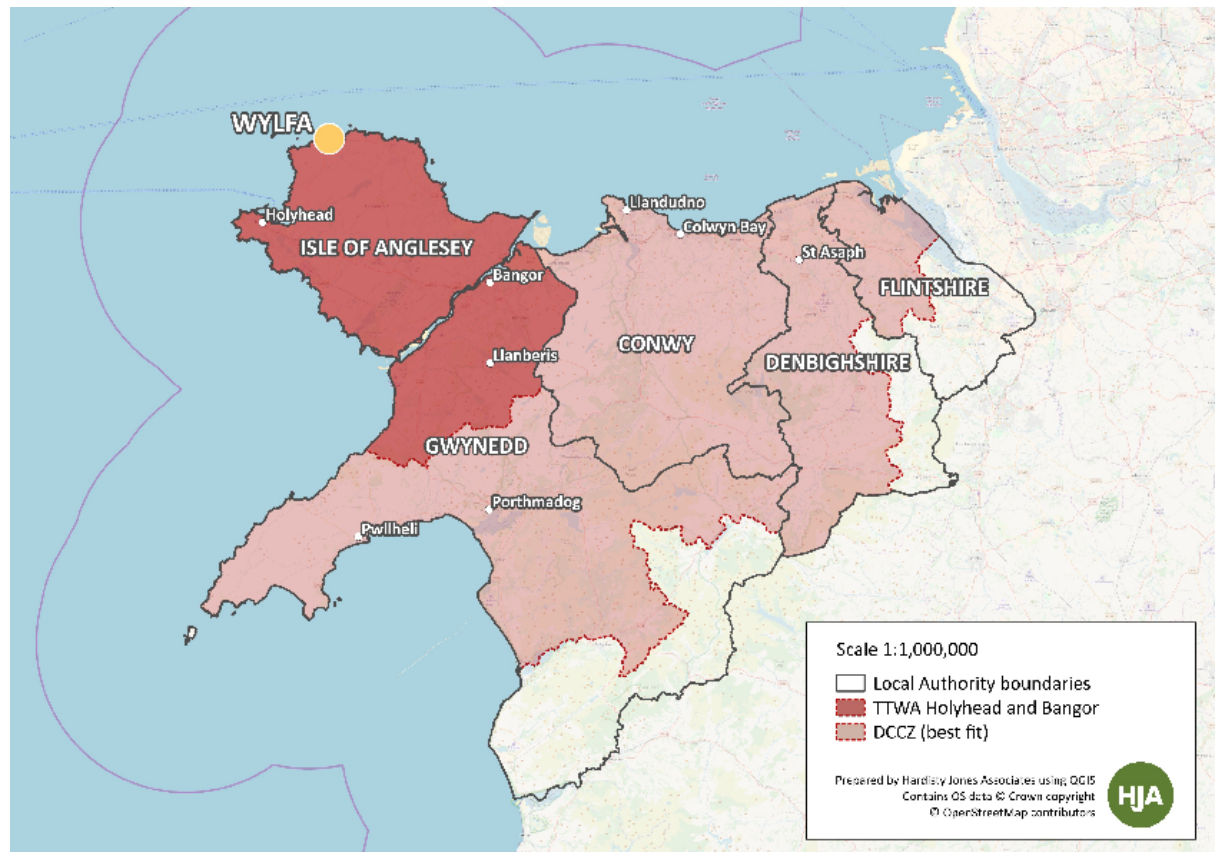
- 3.2.1 Horizon expects to employ 1,256 home-based workers from Anglesey. These are in a range of occupations. There are too few JSA claimants in Anglesey to meet the demand for workers in the main categories of Site Services, Clerical & Security, Civils Operatives, and Mechanical & Electrical Operatives. If the expected demand for home-based workers in Anglesey is met from current employment in Anglesey then it will lead to high levels of displacement.
- 3.2.2 Therefore, employment of home-based workers from Anglesey may displace people who live in Anglesey and work in Gwynedd. 22% of people working in Menai Mainland commute daily from Anglesey, and 3% of those who work in the Rest of DCCZ Gwynedd. However, the largest part of the demand for home-based workers at Wylfa Newydd is for Skilled Trades Occupations, which comprise only a small part of the commuters from Anglesey, particularly to Menai Mainland.

Appendix A

Horizon Nuclear Power, 2018, provides data on the expected distribution of home-based workers across the DCCZ. This is broken down to: Anglesey, Menai Mainland, and the Rest of the DCCZ.

The Rest of the DCCZ can be seen in the figure below.

Figure A1: Map of the Daily Construction Commuting Zone



To estimate the demand for home-based workers within the Rest of the DCCZ we have:

- Collected data on total employment in the Rest of the DCCZ, from the ONS Business Register and Employment Survey (BRES, 2016) by ward
- The Rest of the DCCZ comprises part of Gwynedd, all of Conwy, part of Flintshire, and part of Denbighshire
- Calculated the amount of employment in the Gwynedd part of the Rest of the DCCZ, as a percentage of the total employment in the Rest of the DCCZ
- Applied this percentage to the demand for home-based workers from the Rest of the DCCZ