

## ANGLESEY AND GWYNEDD JOINT LOCAL DEVELOPMENT PLAN (2011 – 2026)

### PUBLIC EXAMINATION:

#### Hearing Session 5 – Economy – Employment, Retail and Tourism



#### Action Point 1 (S5/PG1) – Employment Land Provision – Policy CYF1

##### *Matters Arising Change in order to:*

*Submit an additional explanatory paper providing further details on the quantitative and qualitative justification for the total employment sites safeguarded, allocated and reserved within the Plan in Policy CYF1, giving attention to the latest information available on Horizon Nuclear Power Ltd's requirements:*

- *expand on the purpose of the sites shown in Policy CYF1 of the Plan,*
- *improve understanding of what is meant by a development 'associated with Anglesey Energy Island Programme', and*
- *improve understanding of what type of sites could fall within the remit of Policy CYF 4 (if there was a proposal to release part of a site or a whole site for an alternative use):*

*In undertaking this work, information is provided on the infrastructure requirements and the associated timescale to realise the development on the sites, any funding mechanisms and finance.*

*Include further justification within the policy relating to the criteria listed in Policy CYF4. Further, need to consider if there is a need for 'or' or 'and' for the criteria in Policy CYF4.*

#### **Councils' Response:**

##### **Employment Sites**

The Deposit Plan's portfolio of employment sites (Policy CYF1) is based upon the Employment Land Review (ELR) which was conducted by URS Scott Wilson in 2012 (DC.004). The portfolio of sites that were identified in the ELR as being suitable and required for employment (B1, B2 and B8 uses) purposes during the Plan period consists of existing employment sites, i.e. safeguarded employment sites, and new sites, i.e. allocated employment sites. The safeguarded sites are categorised as being prime employment sites (available in the short term, include the necessary infrastructure and are accessibly located) whilst other existing safeguarded sites are categorised as secondary sites, more likely to satisfy local demand as opposed to investment schemes. Additional sites, two of which would be 'new' sites, are identified as 'reserve' sites that could potentially be required to satisfy proposals relating to Energy Island/ Enterprise Island should

existing and allocated sites prove to be inadequate. Sites included in Policy CYF 1 are of regional and/ or local importance. The Councils consider they will provide the flexibility of choice to meet the Plan area's needs and are well located.

Policy CYF 1 and Policy CYF 2 support proposals for new B1, B2 and B8 employment uses, including complementary/ ancillary uses (where appropriate), on safeguarded (existing) and allocated and reserve employment sites in order to support economic growth and the long term viability of Centres and Villages.

In light of the Inspector's request for further information relating to the extent of land/sites being advocated within Policy CYF1 and the function of these sites, further work has been undertaken to justify the portfolio of employment sites on Anglesey which is endorsed within the Plan. The attached paper (see appendix 1) outlines the requirement for employment sites during the Plan period on the Island and their likely functions especially in relation to the wider Energy Island Programme related projects.

The attached paper concentrates on the portfolio of employment sites included in Policy CYF 1 which relates to Anglesey.

Revised Policy CYF 1 (see Appendix 2) provides 101.4 of vacant employment land (existing/ safeguarded and an allocation) during the Plan period within the Gwynedd Local Planning Authority area. This equates to providing for 6.76ha per annum during the Plan period, which is only slightly higher than the requirement set out within the Employment Land Review, i.e. 6ha per annum. The Plan also acknowledges that there will be occasions where it may not be appropriate for some new development in the Gwynedd Local Planning Authority area (and Anglesey) to be located on existing employment sites, e.g. small scale businesses, homeworking. There may also be occasions where new businesses may have specific locational requirements. Policy CYF 3 and CYF5 provide the required level of flexibility and checks in line with Gwynedd Council's strategies.

The provision of employment land is dispersed across Gwynedd and it is considered to satisfy the indigenous need as well as providing some prime employment sites which are more strategic in size, position and function. It is considered that the portfolio of sites being endorsed should remain within the Plan.

Matters Arising Changes are proposed to Policy CYF 1 to; (i) correct the amount of vacant land available in Bae Hiraef, Bangor; (ii) provide a link with Policy GWA 1; (iii) to correct repetition within the table; (iv) to clarify when reserve sites would be released, (v) to clarify the amount of employment land being safeguarded and allocated in Gaerwen and (vi) delete the reference made to vacant land within Policy CYF1 as the amount of vacant land is likely to change during the Plan period. Furthermore in accordance with the Councils' Response to PG2/S12 presented to respond to Natural Resource Wales' objection to the safeguarding of Adwy'r Hafan Pwllheli, the site has been removed from Policy CYF1. A Matters Arising Change is proposed to the Plan to include a specific policy which relates to Adwy'r Hafan. Additional Matters Arising Changes are proposed to the explanation to Policy CYF 1 to clarify and remove repetition. The Matters Arising Changes are presented in a composite version of the Policy in Appendix 2

#### **Policy CYF 4**

Further clarity was also sought relating to the application of Policy CYF 4. Policy CYF 4 was included in the Plan to provide a local planning policy framework to deal with proposals during the

Plan period for alternative (to B1, B2 and B8) uses other than suitable ancillary or sui generis uses on employment sites included in Policy CYF 1. Policy CYF 4 seeks to ensure that the employment sites or plots within them are not lost to other uses, unless there is a clear justification for accepting an alternative use. Some of the safeguarded sites within the Plan may become dormant – therefore an alternative use on the site may be sought. There are also examples of proposals for D2 uses, which sometimes benefit from warehouse type premises. It is proposed that the policy is further amended to clarify that Policy CYF4 only relates to safeguarded employment sites (see Appendix 3).

## APPENDIX 1

### Employment Land Allocation in Emerging JLDP – Further Explanatory Note

#### 1.0 Introduction

- 1.1 This note has been prepared at the request of the Inspector to the Examination in Public of the Anglesey & Gwynedd Joint Local Development Plan. Following Hearing Session 5 of the Examination in Public - Economy – Employment, Retail and Tourism, further explanation was sought as follows:
- 1.2 *Present an additional explanatory note which further details the quantitative and qualitative justification for the total allocated, safeguarded and reserve employment sites within Policy CYF1. Specific consideration should be given to the most recent information available from Horizon Nuclear Power Ltd, and should:-*
- i. Highlight the role of the sites which have been shown in Policy CYF 1 of the Plan,*
  - ii. Better the understanding of what is meant by developments ‘related to the energy Island programme’, and*
  - iii. Better the understanding regarding which sites could fall under the remit of Policy CYF4 (if there was a proposal to dispose of the whole site or part of the site for an alternative use):*
- 1.3 *When preparing this work, information should be provided relating to the infrastructure requirements, the associated timetable and any finance packages which will be sought to facilitate development.*

#### 2.0 Approach

- 2.1 To address each of the Inspectors’ requests in turn and for ease of reference, this report has been structured as follows:
- 2.2 **Section A** – Gives background and context to Anglesey, the Energy Island Programme (and in Particular the new nuclear build at Wylfa Newydd) and the scale of the likely demand. Against this backdrop, there are several Annexes that better define what is meant by developments ‘related to the Energy Island Programme’.
- 2.3 **Section B** – This Section provides further detail on the quantitative and qualitative justification for the total allocated, safeguarded and reserve employment sites within Policy CYF1; This Section also includes a table (**Table 1**) which summarises the role of the employment site, its potential future use, identification of any infrastructure constraints and whether the Council will seek any funding packages to develop sites.
- 2.3 **Section C** – Conclusions.

#### 3.0 SECTION A - Context

- 3.1 Since 2008 Anglesey has been subject to major job losses and the closure of large employers, most notably Anglesey Aluminium, Eaton Electrical and Vion Foods. Combined, over a 1,000 jobs were lost having a substantial impact on individuals and communities. The Island's GDP and GVA are consistently ranked lowest in Wales (and the UK) and the Island suffers from high levels of deprivation across a number of its Wards. However more recently, Anglesey is on the cusp of unprecedented levels of inward investment linked to the energy sector. This investment totalling in the region of £10-15 billion will not only transform the economy exponentially but will facilitate long-lasting, positive change for businesses and residents for a generation.
- 3.2 At the core of this unique opportunity is the Wylfa Newydd development. This project alone is worth circa £10 billion and is amongst the largest inward investment projects throughout Europe, let alone the United Kingdom and Wales. It forms part of the UK Government's National Policy Statement (NPS) for Nuclear Energy (EN-6); it aligns with Welsh Government strategy for energy sector development and economic growth and forms the nucleus of the Energy Island Programme.
- 3.3 The Wylfa Newydd development – and the cumulative impacts of the other schemes (see Figure 1.1 below) – will create a level of demand not previously seen on Anglesey and is difficult to quantify such is the scale. There will be significant supply chain opportunities across all sectors from construction to catering to accommodation to site management. It is therefore critical that the Island prepares positively to the opportunity by embracing:
- Proximity principle – companies who will form part of the supply chain will demand to be located close to the site reacting to 'just in time' delivery principles. There will also be a huge demand for food production/distribution and delivery of other goods & services to the 10,000- 15-000 construction workforce (on a daily basis) necessitating the need to be in close proximity.
  - Provision of employment land – the level of demand by both the **construction** and **operational** phases of the 'EIP related development' is as yet unknown, but Anglesey must have adequate employment land provision to capture and maximise on this the once in a generation and transformational opportunity;
  - Skills and employment – Anglesey is well placed to meet a high-level of the demand from the Wylfa and other projects and indigenous companies and inward investors will require space and capacity to grow, flourish and create jobs and wealth.
- 3.4 Whilst based on historic take up rates and a pattern of economic uncertainty and decline the employment land provision required for the Plan period may at first glance seem an over provision, the scale of that which faces the Island, its residents and businesses over the next 10 years is unprecedented and truly presents a once-in-a-lifetime opportunity. The County Council is pre-empting these substantial business growth and inward investment opportunities by reacting

positively and confidently to ensuring that an adequate provision of employment land is available to encourage and attract significant inward investment, but also ensuring adequate supply for our indigenous growing businesses. It is the County Council's vision to maximise every single opportunity that emanates from the Energy Island Programme for our residents and businesses. The Welsh Government has responded by designating Anglesey and Sites as an energy related Enterprise Zone. Capitalising therefore upon the opportunities of Wylfa Newydd is a major plank of the North Wales Economic Ambition Board (NWEAB) Vision and their bid for Growth Funds from the UK Government.

### 3.5 Wylfa Newydd & Other Major Developments

3.5.1 The diagram below aims to demonstrate the scale of potential inward investment opportunities proposed on Anglesey over the coming years (not exhaustive). What the illustration cannot portray is the significant level of supply chain opportunities emanating from each of these proposed developments, which the Council believes to be considerable. Further detail on these developments is contained in Appendix A.



- 3.5.2 Horizon Nuclear Power Ltd. is currently planning to develop a new nuclear power station, the 'Wylfa Newydd Power Station', on land west of Cemaes on Anglesey, representing an investment of around £10 billion. Horizon's new nuclear power station on Anglesey would deliver approximately 2,700 megawatts (MW) of electricity, enough power for around five million homes.
- 3.5.3 Some of the associated developments will be proposed on existing employment sites (e.g. Logistic Centre in Parc Cybi); however the direct, indirect and induced supply chain opportunities from Wylfa Newydd will stimulate significant inward investment and growth for our existing businesses. Horizon state that 60% of the project value will be spent in the UK throughout the lifecycle of the project.
- 3.5.4 In addition to Wylfa Newydd, there are a number of other major developments proposed on Anglesey, such as the 299MW Biomass Plant proposed by Orthios, tidal power proposed by both Minesto and Morlais, the £20m Science Park at Gaerwen and the multi-million expansion plans for Coleg Menai. These developments offer considerable economic benefits in themselves, but cumulatively they would transform the economic fortunes of Anglesey, which is the vision and aspiration of the Energy Island Programme (further detail on these projects are outlined in Appendix A).
- 3.5.5 The employment land requirement for these huge energy infrastructure projects is largely unknown. For example, Minesto or Morlais could require on-shore facilities to assemble or manufacture off-shore components, they may require maintenance facilities and so on, which could be located at Holyhead Port or Parc Cybi, for example. The uncertainty regarding the direct employment land requirement of these companies together with the indirect and induced supply chain opportunities are of a scale which cannot be fully quantified at this stage. The Plan therefore has provided sufficient land, in the correct locations, to capitalise on these major inward investment opportunities and to enable local businesses to develop.

## **3.6 Summary**

- 3.6.1 The Plan period will shape and define Anglesey's economic future as these developments will present a once in a generation opportunity to transform the economic fortunes of Anglesey and the wider sub-region. Although an important indicator, basing employment land projections on historic trends and take up rates is impractical in this instance as the economic opportunities and challenges which will be present over the next 10-15 years is of a scale and complexity not previously witnessed on Anglesey or North West Wales. Having sufficient land, in the correct locations and of the right quality is therefore critical in order for Anglesey to maximise on these opportunities.
- 3.6.3 It is important to differentiate between the **construction phase** and the **operational phases** of these huge infrastructure developments as the employment land requirements (and subsequent supply chain requirements) for both phases are very

different. We are currently in the construction phase of these major projects which is a more uncertain period and may require more employment land in the short to medium term.



#### **4.0 SECTION B – Evidence Base & Justification**

- 4.1 The quantitative and qualitative justification for the total allocated, safeguarded and reserve employment sites within Policy CYF 1 is a combination of:
- a. An update of the baseline for the consent and take up of sites across the Island since 2006 drawing out temporal and spatial trends to comment on the extent to which existing provision has met, and continues to meet, indigenous demand; and,
  - b. The additionality of the expected opportunities which will arise from the Energy Island Programme and the Wylfa Newydd Project in particular.
- 4.2 Evidence bases for the above are considered below (and further outlined in Appendix B, C & D) and form the basis for a detailed commentary on each site and their expected roles in meeting 'indigenous' demand and/or 'additional' demand as outlined in **Table 1** below.
- 4.3 The past 10 years of consenting data (Appendix B & C) demonstrates that the indigenous demand for employment land on the island has been met by existing provision and some 144 ha of employment generating proposals have been consented. A flexible approach to the use of employment land has led to the accommodation of a range of uses (See Appendix B). Of the average annual take up of 14 hectares, 8 hectares has been met by newly developed land with the balance of 6 hectares accounted for by 'churn' on safeguarded sites.
- 4.4 The majority of consents (88%) have been for employment generating uses. There has been some use of land for retail uses – primarily at Penrhos.
- 4.5 The trend for consents over the past decade (see Appendix C) is somewhat complicated by the consents for the re-use of Anglesey Aluminium and the Holyhead Waterfront but, these aside, the economic downturn is evident. Planning activity up to 2011 was at a low level and this aligns to the period considered by the URS Employment Land Review of 2012. Indeed, the annual take up (4 hectares) between 2006 and 2011 accords exactly to the findings of the URS study.
- 4.6 Post 2011, land take up rates has been far greater than historically. Figure 2.1 in Appendix C shows that this has amounted to 13 hectares per annum which makes for an average of 9 hectares per annum over the last decade.
- 4.7 Figure 2.2 in Appendix D depicts this same data spatially. The primary site at Anglesey Aluminium is very evident. Sites in Amlwch, Penrhos, the Menai Science Park, Gaerwen and Bryn Cefni have also been taken up. It is also evident that Bryn Cefni and Amlwch are providing a ready source sites for redevelopment.

4.8 From the updated baseline evidence, the following conclusions are drawn:

4.8.1 Planning activity and land take up has markedly increased on the island since the evidence to the 2012 URS Employment Land Review was amassed. In summary the most notable features are:

- Commencement of development at Park Cybi and the re-use of Anglesey Aluminium at Holyhead;
- The steady implementation of consents at Penrhos;
- The steady implementation of consents at Bryn Cefni as well as high levels of churn;
- The Menai Science Park is currently being taken up at Gaerwen;
- The steady implementation of consents at Mona;
- Some development and churn activity at Amlwch together with the potential presented by the former Shell site (Employment Land C28).

4.9 These developments are further detailed in **Table 1** below. As requested by the Inspector, this table aims to describe the role and potential future use of the employment sites (through indigenous growth or EIP related developments) and seeks to identify any infrastructure constraints and/or finance packages currently being sought to develop any of these sites.

**Table 1 - Anglesey Employment Sites**

		SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
Primary Sites	Urban Service Centre	Parc Cybi, Holyhead		C11	53	109.2	<ul style="list-style-type: none"> <li>Site developed as strategic employment site by Welsh Government. All infrastructure and utilities in place. Uptake of employment land has been stagnant since its inception with only the Truck Stop being developed. However given its location; it is seen as a key site for Wylfa Newydd associated developments &amp; other supply chain opportunities.</li> <li>Approx. 2 Ha proposed for Logistic Centre for Wylfa Newydd.</li> <li>B8 use comprising welfare &amp; security building, warehouses, laydown areas and designated parking zones for HGVs.</li> <li>Employment opportunity for up to 46 staff.</li> <li>This development is seen as an anchor for attracting inward investment and business expansions, in particular, those that will benefit from being in close proximity to the logistics centre.</li> <li>These could for example comprise compounds, depots, offices, storage of plant, equipment and materials for Tier 1 and 2 contractors as well another business that indirectly supports construction for which close proximity to the logistics centre and A55/Port facility is important.</li> <li>Parc Cybi is seen as a key strategic site for future developments relating to Wylfa Newydd and other EIP developments. Although historic take up rate has been slow since Parc Cybi was created, a number of planning application have been approved on the site and Wylfa Newydd is seen as the catalyst for future development of the site.</li> </ul>	<p><b>Infrastructure</b></p> <p>No known infrastructure constraints. This site has been developed by Welsh Government in past 10 years which includes utilities and services.</p> <p><b>Timescale</b></p> <p>Planning application expected to be submitted by Horizon early 2017 for logistic centre.</p> <p><b>Finance Packages</b></p> <p>Welsh Government has already spent in excess of £10m on the development of Parc Cybi. No current intention to seek additional finance to develop site.</p>
		Penrhos Industrial Estate, Holyhead		C12	2.69	5.8	<ul style="list-style-type: none"> <li>Penrhos has been subject to significant development over the past decade for a mix of employment and retail uses. The estate is for the most part occupied, the remainder has planning consent and its position in the land portfolio was acknowledged in the Employment Land Review.</li> <li>The Council is therefore confident that the employment land allocation for Penrhos is sufficient to meet future demand.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site is fully serviced to accommodate future – albeit limited – development</p> <p>Recent spend (£325,000) to improve the business units and overall estate</p> <p><b>Timescale</b></p> <p>Expect the site to be fully developed within 5 years</p> <p><b>Finance Packages</b></p> <p>EU funding application currently in progress being developed by the County Council</p> <p>Substantial funding has previously been implemented through Vibrant &amp; Viable Places (VVP) Welsh Government</p>

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								programme and EU Structural Funds
		Bryn Cefni Industrial Estate, Llangefni		C13	18	59.5	<ul style="list-style-type: none"> <li>Being the administrative and educational hub of the Island, Llangefni is an important employment location for the whole Island. Offering a mix of office space, light industrial and retail uses, Bryn Cefni is becoming an increasingly sought after location for new and existing businesses.</li> <li>Its close proximity to the A55, its links to Coleg Menai and the construction of the new Link Road will see Bryn Cefni flourish over the next 5-10 years. The recent development of new, high quality industrial units through EU/EZ Funding (all of which are occupied) and the demolition of old and dilapidated units in Bryn Cefni will again act as a strategic enabler for future development and growth.</li> <li>Over 14 hectares at Bryn Cefni has been developed over the last decade equally split between new development and churn. Only a modest increase in the rate of development of new sites to approx. 1.5 hectare per annum would take up the remaining vacant land.</li> <li>This is considered likely given the provision of the new Llangefni Link Road which is being funded by the Welsh Government (EZ and Local Transport Fund) and will make the estate more accessible and attractive as well as enabling Coleg Menai to deliver their masterplan to support skills, training and education linked to the energy &amp; construction sectors.</li> <li>Although no development is directly proposed by Horizon in Llangefni, the link to Coleg Menai and the already evident indigenous growth provides confidence that this employment land will be developed and is essential to meet this future growth.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site is fully serviced. The development of the Link Road will address the Highways constraints that exist. Demand exists for small business units to address and overcome private sector market failure. No other infrastructure issues remain.</p> <p><b>Timescale</b></p> <p>As EIP matures and Link Road progresses – which will enable Coleg Menai expansion plans – expectation that area will develop quickly</p> <p><b>Finance Packages</b></p> <p>Substantial spend has been implemented. £3.5m EU funding and for land reclamation and business unit construction and circa £6m funding towards Link Road.</p>
<b>Secondary Sites</b>	<b>Urban Service Centre</b>	Former Shell Land, Amlwch		C28	7	19.3	<ul style="list-style-type: none"> <li>This site has recently been subject to a renewal of planning consent for a Liquefied Natural Gas (LNG) Plant.</li> <li>The scheme would provide the capacity to re-gasify LNG direct from the vessel at a rate of 3Bn cubic feet per day and transport the resultant gas to the National (gas) Transmission System (NTS).</li> <li>The gas pipeline connection from Anglesey to the NTS in Lancashire is to be the subject of a separate application.</li> <li>The proposed development would create 200 construction jobs and 60 full time operational jobs.</li> </ul>	<p><b>Infrastructure</b></p> <p>The site currently consists of the former bromide processing plant known as Octel. There are no known infrastructure constraints for this site to be developed.</p> <p><b>Timescale</b></p> <p>Renewal of planning consent was granted in July 2016.</p> <p><b>Finance Packages</b></p> <p>Land being developed by private</p>

	SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
							developer. No need for public sector intervention.
	Llwyn Onn Industrial Estate, Amlwch		C29	3.16	15	<ul style="list-style-type: none"> <li>The estate has seen the take up and re-use of about 4 hectares of land over the past ten years that sets it out as a valuable location although extensive areas remain underused, vacant and still in agricultural use.</li> <li>Past trends would suggest that the present supply is unlikely to be taken up within the plan period. However, this is the closest industrial estate to Wylfa Newydd and this may present opportunities for local companies or inward investors with supply chain opportunities. The site is also adjacent to Madyn Farm which Horizon proposes to use for construction workers accommodation so supply chain opportunities may also arise from this.</li> <li>The Council therefore believes that this land is wholly justified to be safeguarded for employment purposes and would be confident that this land is developed within the plan period.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site is fully serviced with no infrastructure constraints known.</p> <p><b>Timescale</b></p> <p>Site has been developed on a piecemeal basis over the intervening years and we would expect this to continue throughout the life of the Plan.</p> <p><b>Finance Package</b></p> <p>Limited spend has been undertaken on the site. Objective 1 funding delivered new business units which have been leased for a number of years. Currently no finance package is being actively sought.</p>
	Anglesey Aluminium Land, Holyhead		C30	81.7	90.5	<ul style="list-style-type: none"> <li>Planning consent secured by Orthios Ltd for 299MW Biomass Plant.</li> <li>Combined Food and Power Technology proposed to use excess heat from biomass for food production (hydroponics &amp; aquaponics). This facility will be the largest in-land prawn growing facility in the World and will provide a large soil-less indoor facility for growing vegetables.</li> <li>The existing planning consent for the biomass plant <u>does not</u> include the food production element (known as Eco Park). This will subject to a separate application.</li> <li>Biomass material will be delivered to site via existing underground conveyor belt from jetty in Holyhead Port.</li> <li>£1Bn investment with 800-1,000 construction jobs and 700 long term operational jobs. Biomass plant alone (i.e. without food production) will create 600 construction jobs and 60 FTE operational jobs thereafter.</li> <li>Demolition works commenced Oct 2016. Construction to commence in 2017.</li> <li>Planning application for Eco Park expected to be submitted in 2017.</li> <li>With the closure of Anglesey Aluminium in September 2009 resulting in a loss of over 400 high quality jobs, this development is much needed for Holyhead and the whole Island. The Biomass Plant plays a key role in the EIP mix and is one of the developments which the Council refer to as being 'related to the Energy Island Programme' due to its job creation and supply chain potential.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site consists of former Aluminium smelter which is currently being demolished. No perceived infrastructure constraints to enable this site to be developed following demolition of existing plant.</p> <p><b>Timescale</b></p> <p>Planning permission secured from DECC in 2011. Planning conditions discharged by IACC in 2016. Demolition work commenced October 2016. Construction expected to commence in 2017 with first generation expected early 2020s.</p>

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							<p><b><u>Finance Packages</u></b></p> <p>Privately financed. No finance packages will be sought to develop this site.</p>
	Former site of Eaton Electrical, Holyhead		C31	2	2	<ul style="list-style-type: none"> <li>• 2 hectare site which has been used as storage facility since the closure of the main factory in 2008.</li> <li>• Site consist of four buildings – one main building with three other ancillary, smaller buildings.</li> <li>• Site also has substantial surrounding land including car-parking/ hard standing and green area.</li> <li>• Located directly in a large housing estate – Ffordd Beibio and Morawelon – which suffers from high levels of deprivation;</li> <li>• Site suffers from poor/ difficult transportation and access due to location;</li> <li>• Although not directly linked to the EIP it could play a part through storage/ land requirements.</li> </ul>	<p><b><u>Infrastructure</u></b></p> <p>Site is fully serviced with ample building space located. Transportation/ access is poor due to location directly in a large housing estate.</p> <p><b><u>Timescale</u></b></p> <p>Site is developed. However, new owner/ occupier may wish to develop site to match their own requirement.</p> <p><b><u>Finance Packages</u></b></p> <p>Currently no finance package is being actively sought.</p>
	Kingsland Site, Holyhead		C32	0.8	0.8	<ul style="list-style-type: none"> <li>• The site comprises a mix of uses including a builders merchants, a fire station and some vacant land.</li> <li>• Any proposal for new employment would be consistent with current uses or in other areas upon their vacation.</li> </ul>	<p><b><u>Infrastructure</u></b></p> <p>No infrastructure constraints known.</p> <p><b><u>Timescale</u></b></p> <p>Site has been developed on a piecemeal basis over the intervening years and we would expect this to continue throughout the life of the Plan.</p> <p><b><u>Finance Packages</u></b></p> <p>Currently no finance package is being actively sought.</p>

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	<b>Open Country-side</b>	Land Near Mona Airfield, Mona		C34	8.9	20.5	<ul style="list-style-type: none"> <li>The site has seen good levels of take up (4.4 hectares) over the past decade with no churn. The vacant land of 8.9 hectares is therefore considered proportionate to the plan period.</li> <li>Historically, a number of the units at Mona have been taken up by businesses which have outgrown their existing premises elsewhere and are looking to develop and expand.</li> <li>Although not directly related to Wylfa Newydd and other EIP developments; direct, indirect or induced supply chain opportunities for local businesses as a result of Wylfa Newydd may result in businesses developing and expanding and requiring larger units within close proximity of the highway network etc.</li> <li>Land at Mona is therefore seen as being required to meeting the indigenous employment land need of the Island.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site and individual plots are fully serviced with no infrastructure constraints known.</p> <p><b>Timescale</b></p> <p>Site has been developed on a piecemeal basis over the intervening years and we would expect this to continue throughout the life of the Plan.</p> <p><b>Finance Packages</b></p> <p>Currently no finance package is being actively sought.</p>
<b>SUB-TOTAL</b>					<b>174.45</b>	<b>319.8</b>		
	<b>Urban Service Centre</b>	Land to the North of Lledwigan Farm, Llangefni		C14	20.6	20.6	<ul style="list-style-type: none"> <li>This land is currently used for agricultural purposes and is in a prominent location on entering Llangefni from the A55/ A5114.</li> <li>It is considered that it would be more suited for B1 uses as opposed to more industrial type uses (B2 and B8).</li> <li>With the new Llangefni Link Road currently being constructed, the land at Lledwigan Farm is seen as a key employment site and a 'strategic gateway' to Bryn Cefni and the Coleg Menai site.</li> </ul>	<p><b>Infrastructure</b></p> <p>To develop Lledwigan a new roundabout would be required on A5114 Glanhwa Road to provide access/egress to the new site. This forms Section 4 of the Link Road and Planning consent has been secured. Detailed discussions have commenced with the Welsh Government to support the whole route and greater clarity will become available as the County Council undertakes a "design and build" tender process for the remaining Stages 3 and 4.</p> <p><b>Timescale</b></p> <p>Discussions are progressing well with the Welsh Government to secure funding to complete Sections 1-4 of the Link Road in its entirety and a decision will be known Early 2017. Following funding there will be a need to undertake procurement etc. therefore it is anticipated that the infrastructure to be delivered within the next 2 years.</p>

	SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
							<p><b>Finance Packages</b></p> <p>Welsh Government funding (EZ and LTF) is being sought to deliver and implement access to Lledwigan site. Discussions are progressing well and clarity on funding decisions will be known early 2017.</p>
	Land in the Creamery, Llangefni		C15	4.9	4.9	<ul style="list-style-type: none"> <li>The site is allocated for a full range of employment uses at an Urban Service Centre 30-40 minutes from Wylfa Newydd. The Council consider that it has the potential to fulfil a number of purposes in support of the EIP.</li> <li>Although in close proximity to Lledwigan, its proximity to the Glambia Cheese factory, the potential uses of this site is could be for more 'industrial' (B2 or B8) type developments as well as for office or other employment uses.</li> <li>The site could be suitable for the Welsh Government supported Food Park building given the importance of the food sector in Llangefni (i.e. the creamery, meat wholesaler, the Food Technology Centre at Coleg Menai etc) and the synergies this may offer. Its proximity to the Creamery could also provide expansion space should this be necessary and retain these jobs on the island.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site is accessible through the Gambia Cheese factory but will require the utilities to make it a serviced plot.</p> <p><b>Timescale</b></p> <p><b>Finance Packages</b></p> <p>Currently no finance package is being actively sought.</p>
<b>Local Service Centre</b>	Gaerwen Industrial Estate, Gaerwen		C33	25.2	58.1	<ul style="list-style-type: none"> <li>Gaerwen industrial estate has been an important employment site on the Island for a number of years. The estate consists of number large employers (such as Huws Gray), but also consists of a number of smaller units for more local businesses.</li> <li>Although the estate has witnessed a number of high profile closures over recent years (Welsh Country Foods &amp; Gwynedd Electrical), it still remains as one of the Island's most important and strategically located industrial estates.</li> <li>With the development of the Menai Science Park, the Council believes that this will act as a catalyst for future growth in Gaerwen and the Council believes that this employment land allocation is essential to allow/enable this to happen.</li> <li>Although not within Horizon's broad area of search for associated developments (i.e. 30 minutes from Wylfa), Gaerwen Industrial Estate can still play an important supply chain role for Wylfa, its associated developments and other EIP developments.</li> <li>The Council is confident that this land will be developed within the plan period and therefore has been included within the employment land allocation of the Plan.</li> </ul>	<p><b>Infrastructure</b></p> <p>The industrial estate is fully serviced. There are historical issues with access from Chapel Street due to traffic volumes and car-parking on the side of the road. Exploratory works for a "relief road" have been undertaken which would provide access from the industrial estate to the roundabout at Junction 7.</p>



	SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
							<p><b>Timescales</b></p> <p>There is currently no timescales on which to deliver the above infrastructure enhancement.</p> <p><b>Finance Packages</b></p> <p>The site is a designated EZ however there are currently no finance packages being sought.</p>
	Menai Science Park, Gaerwen		C38	7.6	7.6	<ul style="list-style-type: none"> <li>• 20-hectare site which has recently been designated as an Enterprise Zone to align with the aspirations of the Science Park;</li> <li>• MSParc will offer businesses bespoke facilities and tailored business support services as well as flexible office space and laboratories;</li> <li>• The Park will focus on key sectors linked to the Energy Island – Energy; ICT; R&amp;D;</li> <li>• The first building is currently under development with a finish date of late 2017 and the Park is expected to develop and grow over the intervening years of the Plan as the EIP matures and is implemented across North Wales.</li> </ul>	<p><b>Infrastructure</b></p> <p>Site is currently the subject of major investment to address all known infrastructure requirements i.e. roads; access; utilities and become a bespoke business park directly meeting EIP need and demands.</p> <p><b>Timescales</b></p> <p>Building will be occupied late 2017.</p> <p><b>Finance Packages</b></p> <p>£20m investment being directed into the M-Sparc project by Welsh Government and EU Structural Funds.</p>
<b>SUB-TOTAL</b>				<b>58.3</b>	<b>58.3</b>		
	Holyhead Port, Holyhead		C(wg ) 35	41.9	41.9	<ul style="list-style-type: none"> <li>• 98 hectare site (total) designated as an EZ which supports a number of opportunities for marine, leisure, transport, energy, cruise and other business;</li> <li>• Extensive potential linked to the EIP through marine especially and opportunities also available through the Wylfa Newydd project;</li> <li>• The Port of Holyhead is operated by Stena Line Ports Ltd, who are the statutory Harbour Authority and are investing heavily in the site</li> <li>• The site has been included as a reserved site due to its potential future use in relation to Wylfa Newydd and other Energy Island related projects.</li> </ul>	<p><b>Infrastructure</b></p> <p>Stena Line currently investing in the site to improve its offering to indigenous and inward investment businesses. Lack of business/ industrial units linked to marine services is a known constraint.</p> <p><b>Timescale</b></p> <p>There is currently no timescales however the site will continue to be developed throughout the life of the Plan.</p>

	SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
							<p><b>Finance Packages</b></p> <p>The County Council is not currently in the process of securing a financial package to develop the site.</p>
	Extension to Gaerwen Industrial Estate, Gaerwen		C(wg ) 36	20	20	<ul style="list-style-type: none"> <li>Site currently sits to the south east of the existing Gaerwen Industrial Estate adjoining employment land allocation C33.</li> <li>With the new £20M Science Park currently being developed in Gaerwen, this land was included within the Plan's employment land supply as a reserved site to take advantage of any employment opportunities resulting from 'Energy Island' related developments.</li> </ul>	<p><b>Infrastructure</b></p> <p>Access to site would be via Chapel Street which consists of a number of residential properties. This road is not suitable for increased traffic movements and would need to be improved or a new link road developed (from A55 Junction 5 roundabout) to make this site suitable.</p> <p><b>Timescale</b></p> <p>No planned timescale to develop site.</p> <p><b>Finance Packages</b></p> <p>No finance packages being sought to develop site or road improvements.</p>
	Former Site of Shell, Rhosgoch		C(wg ) 37	82.2	82.2	<ul style="list-style-type: none"> <li>The site is located to the south west of Amlwch and north of Rhosgoch. The site is not within a settlement, with the village of Rhosgoch approximately 2.5km to the south and Amlwch 4km to the north east.</li> <li>Access to the site is taken from a local road which links to the A5025 to the north.</li> <li>The site is a partly brownfield site formerly used as an oil storage terminal. The site currently includes some agricultural land and tree cover with former oil storage tanks and bunding. The site is surrounded by agricultural land.</li> <li>The site was a preferred location by Centrica to house their substation for the 4.2GW Rhiannon Offshore Wind Farm (RWF), but this project was terminated due to technical constraints offshore. The land was designated as an EZ site in order to promote employment as a result of RWF but unfortunately this did not materialise.</li> <li>Horizon proposes to use Rhosgoch to accommodate up to 1,500 construction workers in purpose built accommodation. Although the Council recognise that there are merits in accommodating workers in remote areas away from settlements to minimise potential impacts, concern still remains on the impacts this will have on the highway network, local communities and other socio-economic issues.</li> <li>The proposed worker accommodation element would take up approximately 13.6 ha of the site. The remainder of the site could be utilised for other developments related to Wylfa Newydd.</li> </ul>	<p><b>Infrastructure</b></p> <p>Road improvements required from A5025 to site. The site has been unoccupied since the early 1980s and therefore required considerable works to provide utilities and services to site.</p> <p><b>Timescale</b></p> <p>Horizon to submit planning application for Temporary Worker Accommodation early/mid 2017. Construction estimated to commence 2019 (following final investment decision for Wylfa Newydd) and will take approximately 18-24 months to construct.</p>

	SITE	EZ SITE (Y/N)	MAP REF.	VACANT LAND (Ha)	TOAL LAND AREA (Ha)	ROLE OF SITES & POTENTIAL FUTURE DEVELOPMENT (i.e. linked to 'indigenous growth' and/or EIP / Horizon Development)	INFRASTRUCTURE, TIMESCALE & POTENTIAL FINANCE PACKAGES
							<p><b>Finance Packages</b></p> <p>Site is privately owned and will be developed by Horizon Nuclear Power (subject to planning consent). No intention by the Council to seek finance package to develop site.</p>
<b>SUB TOTAL</b>				<b>144.1</b>	<b>144.1</b>		
<b>TOTAL</b>				<b>376.85</b>	<b>522.2</b>		

## **5.0 Section C - Conclusions**

- a) Wylfa Newydd and other major developments offer a once in a lifetime opportunity for Anglesey to transform its economic fortunes. Having witnessed years of economic decline and considerable job losses on the Island, this paradigm shift from steady economic decline to a period of huge and unprecedented economic growth cannot be understated. A critical component to this transition is sufficient employment land, in the correct location and of suitable quality.
- b) Wylfa Newydd and other major developments will result in inward investment of approximately £10-15Bn on Anglesey over this Plan period. Although relatively uncertain at this stage, the supply chain opportunities from such significant inward investments will be huge and the Council is confident that the employment land supply is sufficient to meet this demand.
- c) 10,000 – 15,000 construction workers will be required to build Wylfa Newydd and the other major developments. This in itself offers significant supply chain opportunities for the food, retail and leisure industry which will need to be located on Anglesey.
- d) The Plan supports the Council's economic strategy which seeks to ensure that as many opportunities presented by the EIP are maximised locally and that legacies are secured through the use of sites during construction and operation of the major developments.
- e) The scale and diversity of opportunities on offer from the EIP and Wylfa Newydd are unprecedented and call for a range of available sites to meet the demands from businesses, which will be supported by education and training initiatives, business support and appropriate funding bids. The EIP represents a level of activity that is unique in Wales and sufficient employment land is required in order to meet this future demand.
- f) As part of this strategy, the Plan seeks to ensure, in conformity with national policy, that there is no deficit of sites or premises that would prejudice this.
- g) By identifying land in the right locations at the outset the Plan presents a proactive approach as opposed to a reactive approach to site selection at a planning application stage, thus reducing the risk of proposals in less sustainable locations.
- h) The Plan also responds to National Policy Statements for Energy Infrastructure by facilitating and supporting these developments of national significance through adequate provision of employment land.

- i) Recent increases in take up rates justify safeguarded sites.
- j) Given the opportunities presented by Wylfa Newydd and other major developments, the Council believes that the employment land supply in the Plan is sufficient to meet this demand.

## **Appendix A**

### **Energy Island Programme**

Anglesey has a strong tradition of low carbon energy generation, both nuclear and renewable. However, with the recent cessation of power generation at the existing Wylfa Nuclear Power Station and the closure of other major employers on the Island such as Anglesey Aluminium, Peboc, Welsh Country Foods, Great Lakes; the Island was facing a difficult time of economic transition and uncertainty and very limited inward investment success. With the proposed new nuclear build at Wylfa and other major developments proposed on the Island, Anglesey has a once in a lifetime opportunity to transform the economy and the quality of life for Anglesey residents and as a result the Energy Island Programme was established to aim to capitalise on these opportunities.

The Energy Island Programme (EIP) was established in 2010 by the Isle of Anglesey County Council to promote and co-ordinate the proposed developments (attracting and de-risking major strategic energy investment) as well as to maximise the opportunities for local people (such as job creation, supply chain, education & skills).

Energy Island's aim is to capitalise on a number of transformational projects on the Island and create jobs, economic growth and prosperity, with the vision of establishing Anglesey and North Wales as a world-renowned centre of excellence for Research & Development, Production and Servicing of Low Carbon Energy.

The Energy Island Programme collaborates with a number of key stakeholders to:

- Attract and de-risk major strategic investment
- Influence potential developers
- Develop competitive people and communities
- Develop competitive businesses
- Develop competitive infrastructure
- Realising the benefits the major projects can bring and mitigate adverse impacts
- Maximise long term legacy benefits

It is currently a critical period in the Programme with a focus on consenting and mitigating impacts, capitalising on short term labour opportunities and capitalising/influencing on commercial opportunities.

## **Wylfa Newydd**

The proposed Wylfa Newydd power station will require a peak construction workforce of approximately 10,720 construction workers, of which 25% would come from the North Wales region (approx 2,700). The operational workforce is expected to total up to around 850 people when fully operational, with 45% initially coming from the North Wales region. Construction is expected to commence late 2019, following the approval of the Development Consent Order (DCO), and will take approximately 5 years to build. The first reactor is expected to be operational by 2025.

Construction of the new nuclear power station at Wylfa Newydd is a Nationally Significant Infrastructure Project (NSIP) under the Planning Act 2008. Legislation provides that projects like Wylfa Newydd are of such potential importance to the UK that a different consenting process to the “normal” grant of planning permission by the local planning authority applies. Under this process, Horizon proposes to submit an application for a Development Consent Order (DCO) for the power to the relevant Secretary of State. The applications will be made through the Planning Inspectorate who, following examination, will recommend to the Secretary of State whether development consent should be granted or not. The final decision on whether to grant or refuse development consent rests with the Secretary of State.

Although the County Council is not the consenting authority for the NSIP, it will seek to ensure that development has regard to the strategic policies and principles of the Development Plan, which currently comprises the Gwynedd Structure Plan (1993) and the Ynys Môn Local Plan (1996), the relevant NPSs, national (Wales) planning policy and guidance, the Stopped Unitary Development Plan (UDP) supplementary planning guidance and the emerging Anglesey and Gwynedd Joint Local Development Plan (JLDP).

In addition to the DCO application, Horizon and any other third parties promoting projects related to the NNB (for example, proposals for construction worker accommodation) will require consent, through the Town and Country Planning Act 1990 (as amended), for works connected with the development (associated developments). Associated development may be proposed at the main NNB site, in advance of approval of a DCO application and/or they may relate to works on land located off site. Associated development is not covered by the Planning Act 2008 in Wales and would therefore be determined by the County Council.

These associated development applications to be determined by the County Council include:

- Site Preparation & Clearance;
- Construction Workers Accommodation (both temporary and permanent);
- Park & Ride facility;

- Logistic Centre;
- Highway improvements (online & offline);
- Visitor Centre;
- Training & Simulator Building; and
- Off-site stores.

In addition to Associated Developments, Horizon will also require Off Site Power Station Facilities which will form part of the DCO application but will not within the Wylfa Newydd Development Area. These include

- Alternative Emergency Control Centre (AECC);
- Environmental Survey Laboratory (ESL); and
- Mobile Emergency Equipment Garage (MEEG).

### **Other Major Developments**

In addition to Wylfa Newydd, there are a number of other major developments currently proposed on Anglesey which form part of the 'Energy Island Programme' vision. These include (but are not limited to):

- i. ***Orthios Biomass Plant*** - Orthios Ltd secured planning permission from the Department for Energy & Climate Change (DECC) in 2011 for a 299MW biomass power station at the former Anglesey Aluminium site. The proposed biomass plant will utilise Combined Food and Power Technology to use excess heat from biomass for food production (hydroponics & aquaponics). This facility will be the largest in-land prawn growing facility in the World and will provide a large soil-less indoor facility for growing vegetables. This proposed £1Bn investment has the potential to create 800 – 1,000 construction jobs and 700 operational jobs. The existing planning permission does not include the food production element, and a planning application this is expected in 2017. Demolition works for the former Anglesey Aluminium site commenced in October 2016.
- ii. ***Minesto Offshore Tidal Power*** – Minesto propose to develop a 'Deep Green Array' off the west coast of Anglesey. This 10MW array uses revolutionary technology whereby underwater 'kites' are used to generate electricity. The water current creates a hydrodynamic lift force on the wing which pushes the kite forward. The kite is steered in an 8-shaped trajectory by a rudder and reaches a speed ten times the water current speed. As the kite moves, water flows through the turbine and electricity is produced in the gearless generator. The electricity is transmitted through a cable in the tether attached to the wing. The electricity continues in sub-sea cables on the seabed to the shore. This proposed development offers considerable employment and supply chain opportunities for Anglesey in both the off-shore and on-shore components



(e.g. construction, maintenance etc). Given that it's a new technology with a potential to develop further, employment land may be required in and around Holyhead to meet potential future demand.

- iii. **National Grid North Wales Connection** – This project will provide a second set of transmission lines across the Island from Wylfa Newydd to Pentir substation on the Mainland, Gwynedd. This project is a Nationally Significant Infrastructure Project (NSIP) and will require a Development Consent Order from the UK Government. National Grid are currently out to public consultation (5<sup>th</sup> October 2016 – 16<sup>th</sup> December 2016) and will submit a DCO application in the summer of 2017. The National Grid will require construction compounds etc. which could be located on existing employment land (temporarily).
  
- iv. **Canatxx Liquefied Natural Gas (LNG)** - This site has recently been subject to a renewal of planning consent for a Liquefied Natural Gas (LNG) Plant at the former bromide processing plant at Amlwch. The scheme would provide the capacity to re-gasify LNG direct from offshore vessel at a rate of 3Bn cubic feet per day and transport the resultant gas to the National (gas) Transmission System (NTS). The gas pipeline connection from Anglesey to the NTS in Lancashire is to be the subject of a separate application. The proposed development would create 200 construction jobs and 60 full time operational jobs.

## Appendix B

### Planning Consents\* on Employment Sites 2006/7 to date.

Council Classification	All Site Consents (Ha)	New Site Consents (Ha)	'Churn' Consents (Ha)	% Churn
General Regulations (Major)	0.83	0.83		
General Regulations (Minor)	0.49	0.49		
Industry -B1, B2 & B8 (Major)	66.86	14.81	52.05	78%
Industry -B1, B2 & B8 (Minor)	22.12	14.2	7.92	36%
Offices (Major)	0.20	0.2		
Other (Major)**	37.69	37.69		
Other (Minor) ***	3.03	0.85	2.18	72%
Retail (A1 - A3) (Major)	11.25	11.01	0.24	2%
Waste Disposal	1.80	1.80		
Total	144.26	81.87	62.39	43%

\* Multiple consents have been stripped out - e.g. outline or superseded consents that have enabled later detailed consents. \*\* Comprises Holyhead Waterfront. \*\*\* All comprise employment uses

## Appendix C

### Planning Consents by Location 2006-2016

	2006/ 07	2007/ 08	2008/ 09	2009/ 10	2010/ 11	2011/ 12	2012/ 13	2013/ 14	2014/ 15	2015/ 16	2016/ 17	Total
Amlwch		0.77			1.02	0.25	0.03		3.10	0.03		5.20
Menai Bridge						0.01						0.01
Carreglefn						0.25						0.25
Gaerwen	0.05	0.05	0.02	0.25		0.08		0.03	7.80		0.03	8.30
Gwalchmai		0.06										0.06
Holyhead					4.11	52.00		39.79	2.30			98.20
Llangefni		1.82	1.90		2.03		0.55	0.71	0.03	1.08	5.99	14.09
Llangoed											0.16	0.16
Mona		0.25	0.09	0.01	0.96		0.10	0.96	1.80	0.29		4.46
Penrhos		5.43	0.61		3.87		0.20		0.25	0.06	0.99	11.41
Pentraeth		0.20			0.76					0.20	0.07	1.23
Rhostrehwfa					0.06							0.06
Star			0.50			0.02						0.52
Valley						0.08		0.23				0.31
Total	0.05	8.58	3.12	0.26	12.81	52.69	0.89	41.71	15.28	1.66	7.23	144.26

## Appendix D

Figure 2.1 Annual Take Up and 'churn' of Consents 2006-2016

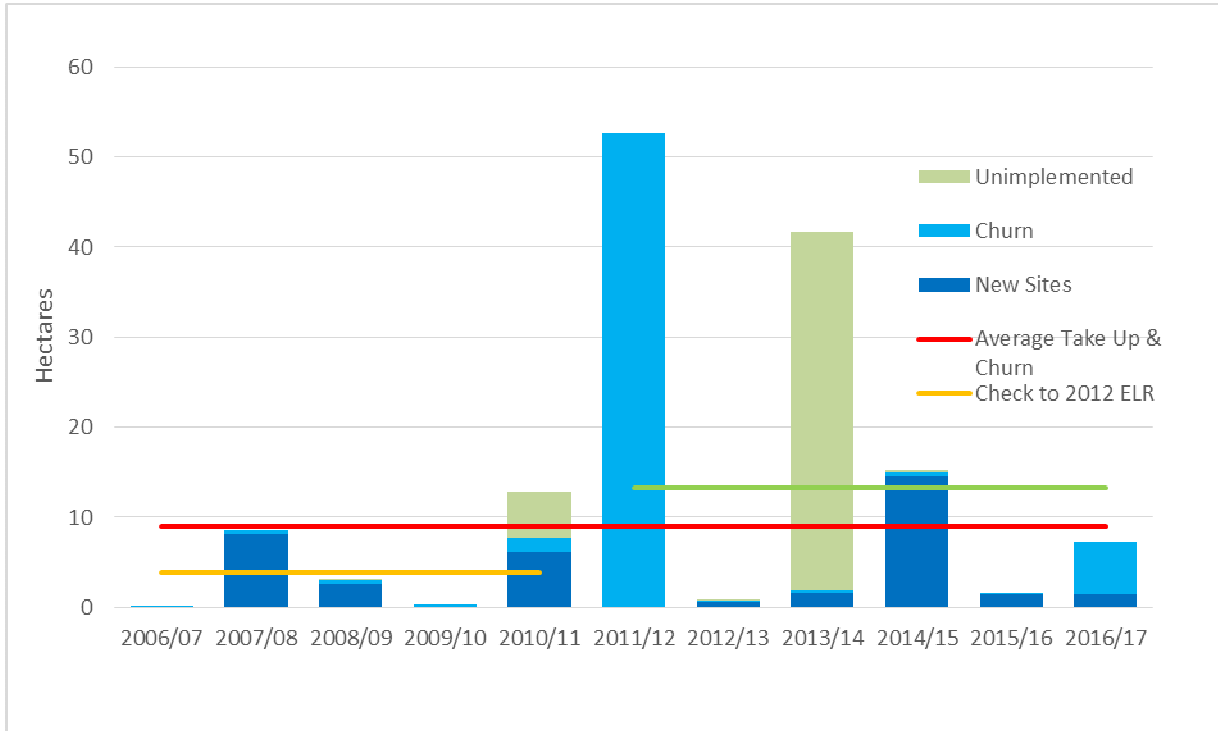
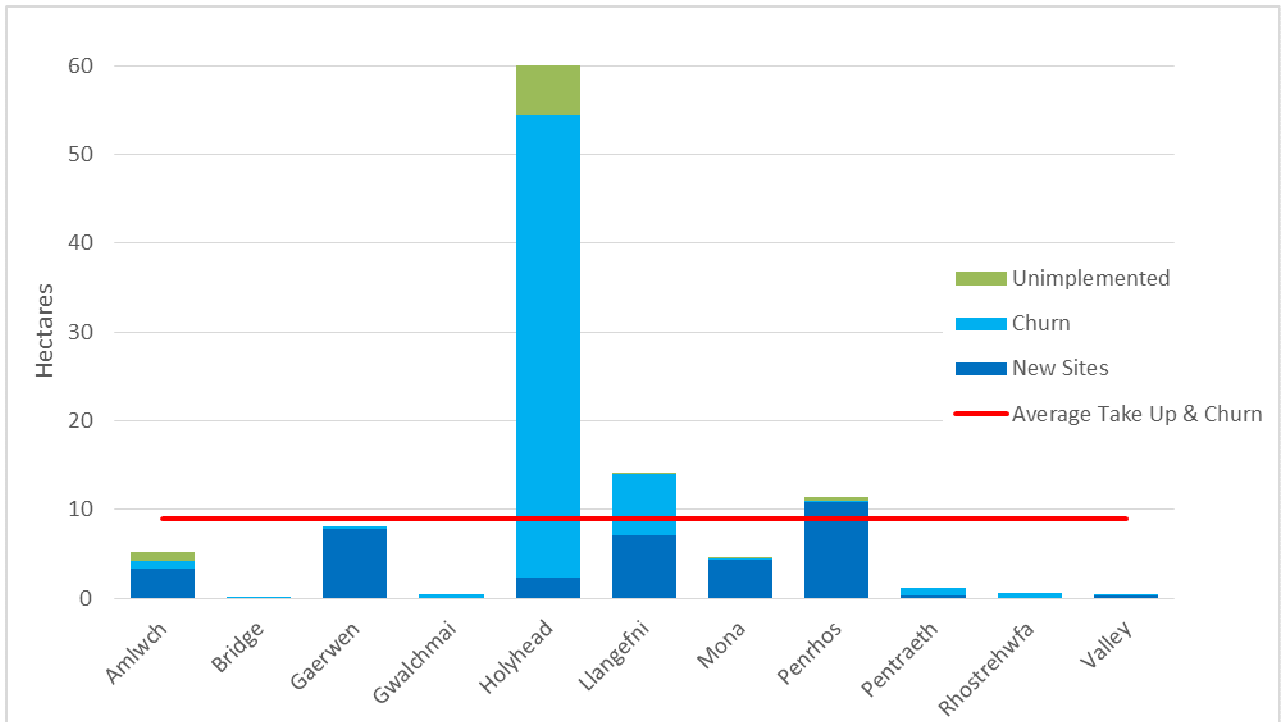


Figure 2.2 Spatial Take Up and 'churn' of Consents 2006-2016



## APPENDIX 2

### STRATEGIC POLICY PS10: PROVIDING OPPORTUNITY FOR A FLOURISHING ECONOMY

Whilst seeking to protect and enhance the natural and built environment, the Councils will facilitate economic growth by:

1. Safeguarding ~~807~~ ~~638.7ha~~ ~~643.8~~ of current land and units for employment and business (B1, B2, B8 and some sui generis uses), purposes ~~that would require or benefit from business or industrial park type location in relation to B1, B2, B8 and some sui generis uses on sites included in the employment land hierarchy during the Plan period and which have been allocated on the proposal maps~~ (in accordance with Policy CYF1);
2. Allocate 60ha 55.1ha of land for employment and business purposes that would require or benefit from business or industrial park type locations in relation to B1, B2, B8 and some sui generis uses (in accordance with Policy CYF1);
3. Facilitate appropriate sites which become available on windfall sites which could satisfy any additional needs to those indicated in criterion 1 and in accordance with the principles given in Strategic Policy PS5 and Strategic Policy PS6 and the Plan's Spatial Strategy, in order to ensure that economic opportunities are maximised;
4. Supporting economic prosperity and sustainability of rural communities by facilitating appropriately scaled growth of rural enterprises, extension of existing businesses and diversification by supporting the re-use of existing buildings, the development 'live work' units, working from home, and by encouraging the provision of sites and premises in appropriate accessible locations consistent with the Plan's Spatial Strategy and in line with Strategic Policies PS5 and PS6;

### POLICY CYF1: SAFEGUARDING, ~~AND~~ ALLOCATING AND RESERVING LAND AND UNITS FOR EMPLOYMENT USE

~~Land~~ Land and units on existing employment sites listed below are safeguarded for employment/ business enterprises. ~~Additional land is allocated as listed below for employment/business enterprises. All sites and~~ are shown on the Proposals Map. Proposals for waste management facilities at the sites identified in Policy GWA 1 will be supported.

	<u>Spatial Strategy</u>	Site	Map reference	<del>Vacant land area (ha)<sup>1</sup></del>	Total Area (ha)	Use	Enterprise Zone Site	Regional Plan Status
Primary Sites	<u>Sub-regional Centre</u>	Parc Bryn Cegin, Bangor	C1	<del>36</del>	36	B1, B2, B8	Not applicable	Strategic Regional Site
		Llandygai Industrial Estate, Bangor	C2	<del>4</del>	27.6	B1, B2, B8	Not applicable	Not applicable

<sup>1</sup> Figure correct at the time of carrying out the Employment Survey, 2011

Secondary Sites	Ynys Môn		Parc Britannia, Bangor	C3	0	7.9	B1	Not applicable	Not applicable	
			Parc Menai, Bangor	C4	<del>13.2</del>	32.9	B1	Not applicable	Strategic Sub-regional Site (Secondary)	
		<u>Urban Service Centre</u>	Cibyn Industrial Estate, Caernarfon	C5	7.3	37.7	B1, B2, B8	Not applicable	Strategic Sub-regional Site (Main)	
			<del>Adwy'r Hafan, Pwllheli</del>	C6	<del>1.5</del>	<del>10.5</del>	<del>B1, B8</del>	<del>Not applicable</del>	<del>Not applicable</del>	
			Business Park, Penrhyndeudraeth	C7	<del>3.1</del>	11.5	B1	Not applicable	Not applicable	
			Business Park, Porthmadog	C8	4	13.5	B1, B2	Not applicable	Not applicable	
		<u>Local Service Centre</u>	Pendre Industrial Estate, Tywyn	C9	2.7	7.9	B1, B2	Not applicable	Not applicable	
		<u>Service Village</u>	<del>Adjacent to the petrol station, Y Ffer</del>	C10	<del>1.7</del>	<del>1.7</del>	<del>B1, B2, B8</del>	<del>Not applicable</del>	<del>Not applicable</del>	
		<u>Urban Service Centre</u>	Parc Cybi, Holyhead	C11	<del>53</del>	109.2	B1, B2, B8	Yes	Strategic Regional Site (Main)	
			Penrhos Industrial Estate, Holyhead	C12	<del>2.697</del>	5.8	B2, B8	Yes	Strategic Sub-regional Site (Secondary)	
		Bryn Cefni Industrial Estate, Llangefni	C13	18	59.5	B1, B2, B8	Yes	Not applicable		
		<del>Land to the north of Lledwigan farm, Llangefni</del>	C14	<del>20.3</del>	20.6	<del>B1, B2, B8</del>	Yes	<del>Strategic Regional Site (Main)</del>		
		<del>Land in the Creamery, Llangefni</del>	C15	<del>4.9</del>	4.9	<del>B1, B2, B8</del>	Yes	<del>Strategic Regional Site (Main)</del>		
	Secondary Sites	Gwynedd	<u>Sub-regional Centre</u>	Hirael Bay, Bangor	C16	<del>6.721</del>	9.1	B1	Not applicable	Not applicable
				Peblog, Caernarfon	C19	2.2	6.7	B2	Not applicable	Not applicable
			Former Site of Friction Dynamex, Caernarfon	C20	7.4	7.4	B2, B8	Not applicable	Not applicable	
			Tanygrisiau Site, Blaenau Ffestiniog	C18	2.7	7.4	B1, B2, B8	Not applicable	Not applicable	
<u>Local</u>			Felin Fawr,	C17	0.4	1.5	B2	Not	Not	

Ynys Môn	<u>Service Centre</u>	Bethesda					applicable	applicable
		Glyn Rhonwy, Llanberis	C21	<del>3.3</del>	29.8	B1, B2, B8	Not applicable	Not applicable
		Penygroes Industrial Estate	C23	<del>4.3</del>	10	B1, B2, B8	Not applicable	Not applicable
		Nefyn Industrial Estate	C25	<del>1.7</del>	3.5	B1, B2, B8	Not applicable	Not applicable
		Former Site of Ysbyty Bron y Garth, Penrhyndeudraeth	C22	<del>1.50.7</del>	<del>161.6</del>	B1	Not applicable	Not applicable
		Griffin Industrial Estate, Penrhyndeudraeth	C39	<del>0</del>	4.9	B1, B2, B8	Not applicable	Not applicable
	<u>Service Villages</u>	Y Ffôr Industrial Estate	C27	<del>2.8</del>	2.8	B2	Not applicable	Not applicable
	<u>Local Villages</u>	Agricultural Park, Llanystumdwy	C24	<del>1.5</del>	6.6	B1, B2, B8	Not applicable	Not applicable
	<u>Open Countryside</u>	Wynnstay Farmers site, Rhosfawr	C26	<del>1.4</del>	4.9	B2	Not applicable	Not applicable
	<u>Urban Service Centre</u>	Former Shell land, Amlwch	C28	<del>7</del>	19.3	B2, B8	No	Not applicable
		Llwyn Onn Industrial Estate, Amlwch	C29	<del>3.16</del>	15	B1, B2, B8	No	Not applicable
		Anglesey Aluminium land, Holyhead	C30	<del>81.7</del>	90.5	B1, B2, B8	Yes	Strategic Regional Site (Main)
		Former site of Eaton Electrical, Holyhead	C31	<del>2</del>	2	B1, B2	No	Not applicable
		Kingsland site, Holyhead	C32	<del>0.8</del>	0.8	B1, B2, B8	No	Not applicable
	<u>Local Service Centre</u>	<u>Gaerwen Industrial Estate, Gaerwen</u>	<u>C33</u>	<u><del>11.3</del></u>	<u>39.5</u>	<u>B1, B2, B8</u>	<u>Yes</u>	<u>Strategic Regional Site (Main)</u>
<u>Open Countryside</u>	Land near Mona Airfield, Mona	C34	<del>8.9</del>	20.5	B2, B8	No	Not applicable	

Land is allocated as listed below for employment/business enterprises and shown on the Proposals Map. Proposals for non B-class employment uses, other than minor ancillary uses will not be permitted.

	<u>Site</u>	<u>Map reference</u>	<u>Vacant land area (ha)<sup>2</sup></u>	<u>Total Area (ha)</u>	<u>Use</u>	<u>Enterprise Zone Site</u>	<u>Regional Plan Status</u>
<u>Urban Service Centre</u>	<u>Land to the north of Lledwigan farm, Llangefni</u>	<u>C14</u>	<u>20.6</u>	<u>20.6</u>	<u>B1, B2, B8</u>	<u>Yes</u>	<u>Strategic Regional Site (Main)</u>
	<u>Land in the Creamery, Llangefni</u>	<u>C15</u>	<u>4.9</u>	<u>4.9</u>	<u>B1, B2, B8</u>	<u>Yes</u>	<u>Strategic Regional Site (Main)</u>
<u>Local Service Centre</u>	<u>Gaerwen Industrial Estate, Gaerwen</u>	<u>C33</u>	<u>25.2</u>	<u>58.1</u> <u>20.3</u>	<u>B1, B2, B8</u>	<u>Yes</u>	<u>Strategic Regional Site (Main)</u>
	<u>Menai Science Park, Gaerwen<sup>3</sup></u>	<u>C38</u>	<u>7.6</u>	<u>7.6</u>	<u>B1<sup>4</sup></u>	<u>Yes</u>	<u>Strategic Regional Site (Main)</u>
<u>Service Village</u>	<u>Adjacent to the petrol station, Y Ffor</u>	<u>C10</u>	<u>1.7</u>	<u>1.7</u>	<u>B1, B2, B8</u>	<u>Not applicable</u>	<u>Not applicable</u>

The following sites are identified as 'reserve employment sites' ~~associated with Anglesey Energy Island Programme not for local market demand for general industrial or business uses, but rather to accommodate business and employment uses that would initially cater specifically for the needs of Wylfa Newydd or other 'Energy Island' / 'Enterprise Island' development. Proposals for B1, B2 or B8 uses on Before consideration can be given to releasing these sites lands for employment use, need~~ need to demonstrate that have to be demonstrated, plus evidence that the proposed development on the site is directly related to realising the objectives of the Anglesey Energy Island Programme and that there was no suitable protected safeguarded or allocated employment site or the supply is insufficient to meet the need.

	<u>Site</u>	<u>Map reference</u>	<u>Area (Total)</u>	<u>Use</u>	<u>Enterprise Zone Site</u>
Reserve Sites	Holyhead Port, Holyhead	C(wg)35	41.9 <sup>2</sup>	B1, B2, B8	Yes
	Extension to Gaerwen Industrial Estate, Gaerwen	C(wg)36	20	B1, B2, B8	No

<sup>2</sup> Figure correct at the time of carrying out the Employment Survey, 2011 Parts of the site is currently occupied with mixed use development.

<sup>3</sup> Land at Menai Science Park, Gaerwen is allocated solely for the development of a Science Park. Any development on the site must be B1 Use or a use which is supplementary or connected to the B1 use. Only uses which conform with the definition of a 'Science Park' will be approved on the site.

	Former site of Shell, Rhosgoch	C(wg)37	82.2	B1, B2, B8	Yes
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~~Land near Gaerwen shown on the Proposals Map (C38) is identified as the preferred site for developing the Menai Science Park.~~

**Explanation:**

7.3.25 An Employment Land Review was carried out to assess current employment sites located within the local authorities. The ELR assessed which sites are most likely to meet the current and anticipated requirements for employment land. The approach taken is in keeping with the sustainable objectives of the Plan. The methodology used to assess to carry out the Employment Land Review corresponds with the methodology as outlined in TAN23: Economic Development (2014). This approach ensures ~~To ensure~~ that there is a balanced provision of employment land which is likely to meet the employment needs and opportunities that are facilitated by both Councils' Strategies, including the Anglesey Energy Island Programme/ Enterprise Island, and the Enterprise Zone Snowdonia. On this basis, it is intended to safeguard existing ~~protect~~ employment land in accordance with the hierarchy referred to above in Policy CYF1. Existing employment sites safeguarded in the Plan are those sites already in use for B1, B2 and B8 uses. It is recognized that these sites have an important role in maintaining and securing future employment opportunities, and therefore the intention is to protect them for those purposes. The different strata within the hierarchy are defined as follows:

- Primary Sites** Sites that are likely to be more attractive to the market and are likely to be developed in the short term. These sites are located within or near Centres and Service Village which have a range of community services, facilities as well as sustainable transport links.
- Secondary Sites** Sites that are not in the most attractive location as regards access and market presence in comparison to the primary sites. However, they offer important opportunities which address local demand as well as the potential demand arising from Anglesey Energy Island Programme/ Enterprise Island. These sites are mainly located within or near Centres, Service Village and Villages, which have a range of community services, facilities as well as sustainable transport links.
- Reserve Sites** Sites that have the potential to meet the demand resulting from Wylfa Newydd as well as the rest of the Anglesey Energy Island Programme/ Enterprise Island
- Strategic Regional Site** Sites of regional importance with a critical role in achieving regional and contributing to national economic development objectives, supporting key sector development.
- Strategic Sub-regional Site** Sites with a more general and localised focus for economic development than regional strategic sites with a focus on



attracting employers that draw a workforce from wider than the local area.

~~7.3.26 — It is important that the Plan provides an appropriate portfolio of employment land in terms of range, quality and quantity to meet the local demand for employment land and units. Safeguarding the sites named above is a means of ensuring that this need is met.~~

~~**7.3.26a** An Employment Land Review (ELR) has been carried out to assess current employment sites located within the local authorities. The ELR assessed which sites are most likely to meet the current and anticipated requirements for employment land. The approach taken is in keeping with the sustainable objectives of the Plan. The methodology used to assess to carry out the Employment Land Review corresponds with the methodology as outlined in TAN23: Economic Development (2014).~~

7.3.27 ~~Traditionally Historically, the rate of take up of employment land within the Plan area has been 4ha per annum. However, the Councils consider that it is critical for the Plan to provide an employment land supply that provides a quantum and a range of employment sites to ensure that the Plan area meets the economic growth aspirations linked to Energy Island/ Enterprise Island over and above the local market demand. To ensure that there is provision for the possibility of slippage and flexibility of economic stimulus that would lead to greater demand for employment land, the Plan provides for the rate of take up of employment land 6ha per annum. The new allocated employment sites equate to 60ha55.1ha and are well positioned in relation to the Plan area's road and transport infrastructure. If the supply of safeguarded and allocated sites is insufficient or inappropriate to meet the demand, 3 reserve sites are identified in Policy CYF 1 to ensure that the under-supply can be effectively addressed. , and existing employment land is also safeguarded which already include development or infrastructure.~~

~~7.3.28 — It is expected that the location of the majority of employment developments within the area and within the Plan period will be on sites that are identified in Policy CYF1. This protection will allow new developments, as well as extension and intensification of employment activities on existing employment sites.~~

## APPENDIX 3

### POLICY CYF4: ALTERNATIVE USES OF EXISTING EMPLOYMENT SITES

Proposals to release ~~employment~~ land on existing employment sites safeguarded ~~or allocated~~ for Use Classes B1, B2 or B8 in accordance with Policy CYF1 for alternative uses will be granted only in special circumstances, provided they conform to one or more of the following criteria:

1. If the site is vacant, that it is unlikely to be used in the short and medium term for the original use or the safeguarded use and there isn't a viable business or industrial use for the site, or;
2. There is an over provision of employment sites within the vicinity, or;
3. The current employment use is having a detrimental effect on amenity and the environment, or;
4. The proposal would not have a detrimental effect on employment uses at adjacent sites, or;
5. There is no other suitable alternative site for the proposed use, or;
6. If the site is used in the short term (on a temporary basis) it should be assured that there are appropriate restoration measures in place to the satisfaction of the Local Planning Authority.

#### Explanation:

- 7.3.29 The Plan seeks to ensure that there is adequate and appropriate provision of land for employment purposes. It is essential that these sites are retained as far as appropriate as they are located in areas close to ~~settlements~~ where people live in order to reduce the need to travel to work and to support economic growth and the local economy. As such the loss of employment uses can negatively impact on access to local jobs and reduce the area's competitiveness.
- 7.3.30 Nonetheless, over time, there ~~may be~~ are cases where some traditional employment sites or premises may become ~~have been~~ dormant ~~for a while~~. Furthermore it is recognized that traditional employment uses do not tend to produce land values that compare with uses such as housing or retail.
- 7.3.31 It ~~would~~ will be necessary to receive ~~a~~ full justification for the change of use ~~of land or units allocated~~ of safeguarded sites or premises listed in Policy CYF1 ~~for B1-B8 use class purposes~~ for alternative uses, including information regarding the viability of the existing employment use, any attempt that has been made to market the unit/land for employment, impact of reduction of job opportunities for the local community, and information regarding the provision of employment sites which meet local demand.
- 7.3.32 When considering the release of existing employment sites it will be essential to ensure that the integrity of the employment site is not compromised specifically because it meets the

needs of local employment. Furthermore it would be necessary to ensure that any potential use is not in conflict with the employment use remaining on the site.

7.3.33 In the circumstance where an employment site is released as an alternative site on a temporary basis, the planning application must be supported with evidence to demonstrate to the satisfaction of the Local Planning Authority that the site can be restored to its original state, unless the temporary development provides infrastructure that can be utilised in the future.

**7.3.38a Further guidance relating to the change of use of employment site for an alternative use will be provided within Supplementary Planning Guidance Change of use of community facilities and services, employment sites, retail units.**