

July 2016

# Employment Land Allocation in the Joint Local Development Plan

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## 1. Introduction

The Examination Inspector has requested that the Councils provide further explanation regarding the identification of Employment land within the JLDP.

Specifically in his Preliminary Note to the Council (dated 6 May 2016) (DA.002) the Inspector requested that:

*“An explanation should be provided of: the reason for the extent of the overprovision of employment land; any assessment of the implications arising from the degree to which such land is safeguarded; and an explanation of why the Plan differentiates between vacant land within the safeguarded sites and new allocations. To assist in undertaking the distribution of employment land a further breakdown of the figures set out in CYF1 should be provided. In addition to providing figures for the total vacant areas it should also include figures for the preliminary (primary) and the secondary sites and provide overall totals for each, as well as sub totals for each tier of the hierarchy”.*

This Explanatory Note seeks to provide the explanation requested by the Inspector by firstly setting out the wider context within which the issue of employment land should be considered relevant to the plan area. The paper then seeks to respond to each element of the question in turn.

## 2. The Economic Future

In response to a range of nationally and regionally significant energy related projects emerging within the plan area the Isle of Anglesey County Council established the Energy Island Programme. Supported by the subsequent award of Enterprise Zone status by Welsh Government, the Energy Island Programme has already acted as a catalyst to investment and economic growth.

Consisting of a number of related energy developments (see map) the Energy Island Programme has quantified the opportunities which face the plan area, and in particular Anglesey, which are of a scale that has not been faced for a generation. Essentially the most significant of these developments in terms of scale and potential economic impact is the proposal by Horizon Nuclear Power (HNP) to construct and operate a new 2,700MW generating station on land at Wylfa. This development presents an unprecedented opportunity for local communities and businesses in terms of economic development and supply chain opportunities. The proposed development will also act as a catalyst for inward investment which will require adequate employment land provision.

Wylfa Newydd will be the subject of an application for a Development Consent order (DCO) in 2017. Current estimates provided by HNP indicate that construction will peak in 2022/23 when approximately 8,500 -10,000 construction workers will be employed at peak (HNP EIA Progress Report 2016). HNP is currently modelling a figure of 9,200 (as opposed to the 8,500 referred to in the Composite Version Joint Local Development Plan (CVJLDP)) and this figure is likely to increase to 10,700 by the time of Horizon’s Pre Application Consultation in August 2016. Whilst a percentage of workers (approximately 25%) may be employed from the local community (home based) the remainder are expected to be non-home based workers the majority living temporarily in the plan area.

In addition HNP currently estimates that around 250 facilities management staff (both on and off-site) and around 200 operational staff (who are expected to be on and off-site, and in other training locations away from Anglesey) will be required during construction.

HNP’s current modelling (HNP EIA Progress Report 2016) suggests that of the 25% home based workers approximately 1,600 will come from Anglesey, representing between 5%-6% of the current



Island workforce with the majority of the remainder also located within the plan area (Gwynedd). Based upon construction sector employment multipliers HNP anticipates that total Wylfa-focused employment on Anglesey would create an additional 1,600 jobs directly or via local expenditure. The Councils are of the opinion that these jobs are likely to extend from Class B1 (a,b,c), B2 and B8 uses to retailing, hospitality and public services and alone provide a rationale to increase the quantum of allocated employment land from historically low figures of 4ha per annum to 6ha over the plan period.

Whilst the construction of the generating station raises some clear opportunities, there are also potential issues. These issues include the possible effects upon transportation onto the Island due to an increase in vehicle movements particularly during the construction phase. Discussions with regard to sustainable travel planning are underway with HNP but one of the key measures which both the Council and HNP can implement to reduce the potential for congestion, and which can also improve the performance of the local economy, is to seek to accommodate as much of the supply chain as possible within Anglesey. This again raises the requirement for a flexible portfolio of sites and premises.

HNP informs the Councils that it is committed to supporting local supply chains, supporting targeted education from secondary school onwards and encouraging a retraining of those currently in the workforce. The Councils understand that HNP is committed to working to see that the local community and supply chain are appropriately informed of new opportunities and given fair opportunity to compete for suitable works. It has embedded these principles within its published Supply Chain Charter.

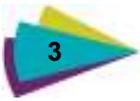
An example of the opportunities that are available is the joint venture Menter Newydd which has been formed between Hitachi, Bechtel and JGC to lead the award of tier 1 contracts on behalf of HNP. It is anticipated that these companies will create a demand for a range of business premises on the Island whilst further supply chain consortia (tier 2) contracts will be let which will also have a requirement for premises and flexible business space.

The Councils recognise that there remain uncertainties over the total number of construction jobs potentially available and the nature of skills (although Horizon have published some detail). The need for a wide and flexible portfolio of employment land is therefore clearly appropriate. In addition to the 10,000 construction jobs, the proposed new nuclear built will also create 850 permanent operational jobs. Hitachi has made a 100 year commitment to Anglesey and the wider region and as such the Councils anticipate that take up of employment land will be considerably higher during the next plan period in comparison to historic trends.

The Energy Island Programme includes for developments other than Wylfa Newydd, a number of which, in their own right, represent major inwards investments into the local economy. For example the consented Anglesey Eco Park and Energy Centre alone represents an investment of circa £1 billion requiring between 800-1000 construction and 700 operation jobs. Similarly the consented Land and Lakes leisure village on land at Penhros is projected to require 400 construction jobs over an eight year period with 600 full time equivalent operational jobs in the long term.

Before the introduction of Wylfa Newydd and other major projects proposed on the Island, the Councils were preparing to manage a state of steady economic decline. The unprecedented development and economic activity now expected over this plan period means that additional employment land allocation is required to ensure that Anglesey and the wider region can fully capitalise on this once in a generation opportunity.

By growing the local economy through the education and skills initiatives referred to above, by having a range of sites and premises available in sustainable locations Anglesey, and the wider plan area, maximises its potential to develop at a rate which is un-recognised and unprecedented when compared against historic trends.



### 3. The Approach to the identification of Employment Land

The CVJLDP describes three categories of employment land; safeguarded, allocated and reserved. Within each category sub-divided into primary and secondary sites. Further information regarding the amount of vacant land available within the sites is provided.

Safeguarded sites are land and buildings in existing employment, business and sui generis use. These sites have an existing access and are serviced. This land is characterised as 'industrial estate' land, i.e. it has an existing employment character such that it is comprised of a mix of existing sites and premises and it includes vacant land which the Councils consider fit within that character.

By contrast, Allocations include land that is currently not characterised as employment land. Often greenfield, the Plan's employment allocations provide an opportunity to provide an improved, more balanced portfolio of sites and opportunities and have been selected based upon work reported within the Council's Economic and Employment Land Review Study 2012 (URS Study) and in the North Wales Regional Employment Land Strategy (2014). Each site was the subject of a detailed site appraisal in both studies. Their importance as key sites for inward investment is such that the four Anglesey sites are designated as Enterprise Zone sites and as Strategic Regional Sites. Further information on the importance of the allocated sites to the future economic development of the plan is provided below.

Reserved sites are also identified within the Plan. These sites are characterised as large areas of land, on the edge of existing settlements, or in open countryside which, due to their location and potential in view of proposals for Wylfa Newydd, offer the opportunity to deliver a number of the legacy benefits sought by the Councils as part of the Energy Island.

For example the port of Holyhead is well located to serve the construction of the power station. Whilst HNP continue to progress plans to construct a marine off-loading facility (MOLF) at the site for the delivery of bulky goods, opportunities do exist to expand upon the current facilities available at Holyhead Port and leave a legacy use for the future.

Rhosgoch is a former Shell site of 82 ha which has lain vacant for over 25 years. Identified within the Regional Employment Land Strategy as being selected by Centrica as part of proposals for a converter station associated with the Rhiannon wind farm project. The site is currently HNP's preferred option as an overspill site for worker accommodation for up to 1,500 Wylfa Newydd construction workers. The proximity of the site to Wylfa Newydd and the supply chain opportunities which have been explained above strongly indicate to the Council that the site does have a potential medium to long-term future albeit use of the site, as with all reserved sites will need to be compliant with CVJLDP policy.

The CVJLDP identifies five employment land allocations totalling some 60ha. Four of the allocations are identified as enterprise zone sites within the context of the Isle of Anglesey Enterprise Zone. These sites are CVJLDP C14 and C15 (EZ site 6), C33 and C38 (EZ site 7). All four sites are identified at the regional level as Strategic sites within the North Wales Regional Employment Land Strategy. Each site was the subject of a detailed site appraisal initially within the URS Study and subsequently confirmed within the regional study referenced above. Both appraisals considered locational factors and deliverability issues.

The following rationale is provided:

**EZ Site 6: Land to the north of Lledwigan farm, Llangefni C14 20ha (Vacant) and Land in the Creamery, Llangefni C15 4.9ha (vacant)**

Plan allocations C14 and C15 represent two sites located either side of the Bryn Cefni industrial road immediately to the south of the urban service centre of Llangefni. Both sites are greenfield and are located in close proximity to the A55 which is the strategic transportation route from North Wales to Holyhead and is part of the E22 Euro Route. Consequently both sites are considered to



represent highly accessible locations with excellent connections to the rest of the Island relatively free from constraints associated with past industrial use.

The sites were identified within the URS study as being most suitable for Class B1 development. The study recognised that whilst neither was currently serviced by road infrastructure and would require a new access point that both would represent ideal sites for inward investment. Each site is identified within the regional employment strategy as a strategic site (see above).

Following the EZ designations the Council undertook to design and consent a proposed roundabout at the junction of the estate road with the A5114. This junction improvement, which will also provide access into each site, will be the subject of a later phase of infrastructure improvement connected with the construction of phases 1 and 2 of the Llangefni link road, a committed project currently in construction linking the Bryn Cefni employment area with Coleg Menai and the neighbourhoods of north Llangefni.

The URS study concluded that both sites could come forward within a time period of 10-15 years (2022-27). However subject to the necessary funding either from public or private sector sources, the Council is confident that these sites will come forward potentially earlier within the plan period. Both sites are considered to be suitable for development associated with the proposed Wylfa Nuclear Power station for example given their proximity (30mins drive time) and excellent connections onto the A55. Policy support for 'Energy Island' related development would be likely to consistent the Wylfa Newydd SPG.

#### EZ Site 7 Gaerwen Industrial Estate, Gaerwen C33 58.1ha (25.2ha vacant)

Gaerwen is an existing industrial estate located to the south of the local service centre of Gaerwen, a linear settlement alongside the A5 London to Holyhead Road. Gaerwen has excellent links to the A55 which runs to the north of the settlement, parallel to the A5. The URS study identified the existing industrial estate as suffering from problems with regard to the quality of some units whilst opportunities for some of the vacant area of land would be reliant upon a new access road and additional services and infrastructure. The allocation of land provides policy support for the redevelopment of existing units and for modernisation within the existing curtilage of the estate. In addition it includes for neighbouring parcels of land to enable future expansion.

As a result of a review carried out during the preparation of this paper the Council wishes to amend the area designated as allocated, and the rationale and effect of the changes proposed is set out within section 4.3.

#### EZ Site 7 Menai Science Park, Gaerwen C38 7.6ha vacant.

Forming the northern part of the EZ site 7 the land allocation is to be partially occupied by Bangor University's proposed science park. Whilst a larger site of 21ha was identified by the Regional Study the smaller, allocated site of 7.8ha is considered to be more appropriate in scale to the opportunity presently presented by the science park concept. Consent for the Science Park has been awarded and construction on site is currently underway. The Councils see the construction and operation of the park as a flagship project delivering high quality, high skilled jobs within the Energy Island context. Opportunities to support either HNP or the wider supply chain are under discussion and the wider Gaerwen allocation provides the land and premises to accommodate future science based business and research.

## 4. Response to the Request posed by the Inspector.

Having set out the wider economic context to the identification of employment and business land within the CVJLDP this topic paper now turns to address the specific requests posed by the

inspector at the pre-examination meeting. The request which is set out in section 1 has been divided into its constituent parts.

#### 4.1 The reason for the extent of the overprovision of employment land

The Plan's approach to the provision of employment land conforms to the guidance of PPW which is that it be underpinned by an up to date and appropriate evidence base to support policy choices and land allocations for economic development.

The starting point for this evidence is the 2012 URS Economic and Employment Land Review which when addressing in para. 6.10.1 the "*minimum and enhanced quantum of land*" states that "*Based on historic take up we would recommend that as a minimum each authority should provide for 4 ha p.a. of employment land in accordance with an adopted spatial planning approach over the plan period equating to 56 ha respectively or 112 ha combined. It is recommended that both authorities should aim to build in a 50% additional target as a buffer measure to provide an enhanced offer, which equates to 6ha p.a*". This suggests plan allocations of 180 ha up to 2026.

Through a systematic review of all employment land in the Plan area, the study recommends the deletion of a number of sites from the land portfolio to identify those that are most attractive for future users. In conformity with the study, the Plan takes these sites forward making allocations whilst protecting those locations where current employment occupation is expected to continue and where vacant land is readily available.

With the exception of the reserve sites, the Plan protects sites that amount to 166 ha in excess of the URS demand projections – the majority of which (154 ha) is made on Anglesey. This provision is set out in revised CYF1.

This provision and focus upon Anglesey is made as a result of the following:

- ▶ Evidence of existing demand on the Island;
- ▶ A better understanding of the impact of Wylfa Neywdd together with other Energy Island Projects including the designated Enterprise Zone.
- ▶ Regional collaboration.

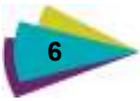
#### Existing Demand

Whilst many parts of Wales, including the Plan area, have experienced historically low take up employment land and the failure of the market to develop sites, there is nevertheless evidence for a demand that is more optimistic than the crude measurement of developed land portrays. This more recent evidence is available from three sources:

- ▶ Market interest in premises on the Island. A number of economic development initiatives on Anglesey have involved the preparation of bids for funding the Welsh Government. Market testing undertaken with local agents to support funding to Welsh Government between 2013 and 2016 has revealed that a level of enquiries has been maintained despite generally prevailing poor market conditions.

Whilst the main focus of interest is the sub-regional centre of Bangor, there is also interest in Llangefni should premises on the mainland not be suitable. The most notable demand is for flexible premises of up to 500m<sup>2</sup>.

- ▶ Direct market approaches to the Council in Appendix A were unfortunately under-recorded, between 2012 and 2015. However, anecdotally, the current level of enquiries received by the Council represent a perceptible increase over the past twelve months. This is felt to be mainly a response to the provision of new premises in, for instance, Bryn Cefni, Llangefni.



- ▶ Property transactions in the sale of Anglesey County Council land are strongly linked to interventions to enable site availability. Appendix B demonstrates the temporal impact of these interventions in Penrhos, Mona and Bryn Cefni up to 2014.

The following developments also provide evidence of the take up of land and premises over the past two years. There has been particular activity at the strategic location of Llangefni.

- ▶ The recent development of business units on 1.06 ha of land on the Bryn Cefni Estate. These units comprised 1,500m<sup>2</sup> of flexible units of 100 to 150m<sup>2</sup>. Over half of these premises were let 'off plan' with the whole development let within four weeks;
- ▶ Also at Bryn Cefni, a re-use has been secured for the 1.33 ha site of the former Ysgol y Bont;
- ▶ Three further sites comprising a total of 1.54 ha have been cleared and are subject to current or future bids for Welsh Government funding;
- ▶ The Llangefni Link Road that will improve the accessibility of the Bryn Cefni Estate is under construction and planning permission are being prepared by the isle of Anglesey County Council for the first tranche of sites associated with its construction. This road, will also serve the plans of Coleg Menai to include a business park, hotel and education facilities to anticipate the employment and training needs of the Energy Island Programme.
- ▶ Elsewhere planning permission has been secured for the development of 2,577m<sup>2</sup> of flexible units on 1.72 ha of land on the Penrhos Business Park. This is now subject to a bid for funding
- ▶ The servicing of land to accommodate the Menai Science Park (M-Spark) at Gaerwen has commenced (see section 3);
- ▶ The development of Parc Cybi in Holyhead is ongoing. Development has commenced with half of the site now available. The site is not wholly developable due to on-site constraints – rock ridges, cultural heritage which contribute to a high quality environmental context to the development.

It is contended therefore that interest in the Plan area is strong and could remain unmet without the strategic intervention of the Council, supported by Welsh Government. It is also considered likely that other interest has gone unmet due to a lack of ready opportunities. An element of Plan provision seeks therefore to provide a range of sites, of differing types, sizes and locations to meet the needs of the indigenous business growth that evidence suggests exists.

To this degree, it is considered that the URS assessment of demand of 90 ha for the Island, if delivered, is adequate to meet a continuation of historical trends as well as an additional 50% increase in demand. However, and given the likely impact of Wylfa Newydd, the Plan anticipates meeting a demand that will not equate to modestly enhanced, historical trends.

### Impact of Wylfa Newydd

This topic paper has already explained the importance of Wylfa Newydd in the context of the local economy. Wylfa Newydd will have a huge influence on the local, regional and national economy. It is recognised by UK Government as a nationally significant infrastructure project and the economic opportunities it provides influenced the identification and adoption of the Energy Island Programme and from that the designation of the Anglesey Enterprise Zone.

Both Council-led initiatives represent a co-ordinated and planned approach to economic investment combining structural support from Government and agencies with partner organisations



to maximise the benefits that could come forward principally from the construction and operation of Wylfa Newydd but also from a wide range of other energy related projects.

Enhanced historical trends may be appropriate in the case of most Plans but not for a plan area where the largest construction project in Wales for a generation will – in all likelihood – come forward within the Plan period.

PPW specifies that as far as it practicable, a Plan should set out an economic vision for the area, including a broad assessment of anticipated employment change by broad sector and land use and so seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses.

This requirement is amplified by TAN 23 which allows that land provision targets may be higher than anticipated demand, to allow for the chance that the assessments are too low and to ensure that no opportunities are missed. They should also allow for flexibility, competition and choice.

Taking these concerns together, the URS study has identified the growth sectors that will be important over the Plan period and the type of employment use and land requirement that these imply.

However, and given the size, complexity and the influence of commercial decisions that may be taken in relation to Energy Island projects, it is not possible to predict with certainty the demand for land generated either from the projects themselves or from the significant supply chains that they will require. Similarly opportunities identified by inward investors to the plan area, establishing operations to support the many energy-related projects remain difficult to predict with a degree of accuracy.

The Council's aspirations for Wylfa Newydd are set out most clearly within the Wylfa Newydd SPG. This sets out policy guidance based upon extant planning policy to secure the maximum legacy benefits arising from the plant's construction and operation and will be updated to remain consistent with the JLDP. HNP's currently proposed a construction workforce substantially higher than similar construction workforces employed or predicted for previous nuclear generating stations. The ability of Anglesey in particular to host a workforce of such a size, for a construction period of up to twelve years which itself represents more than a tenth of the current Island population will be dependent upon it having the land and premises to accommodate direct demand from Wylfa as well as the considerable demand resulting from the wider supply that will be required to service and train a labour-force of this size.

Faced with these uncertainties, the Plan responds by ensuring that there is ample choice for a range of users with a range of requirements. Should sufficient land not be available, or be of the wrong type, or in the wrong location, then there is a danger that employment opportunities would be lost to the Island and, indeed the Plan area. Hence, the Plan allocates and safeguards land to ensure that:

- ▶ no opportunities are missed;
- ▶ provision is made in the potentially most attractive, but also sustainable, locations;
- ▶ opportunities are maintained for existing business to modernise and to expand and
- ▶ that there is flexibility, competition and choice.

The sites in the portfolio are earmarked for as wide a range of use classes as their characteristics allow.



## Regional Collaboration

The North Wales Regional Employment Land Strategy, commissioned by the North Wales Planning Authorities was published in 2014. It identifies priority sectors and strategic sites in North Wales. In the short-term, three of the four sites identified for immediate progress were located in Anglesey at Parc Cybi, Holyhead Port and Gaerwen with a further four out of eight sites identified as priority for infrastructure investment. The emphasis on sites within the plan area (as opposed to the rest of the North Wales Study Area) was considered justified as the strategy considers that investment over the short term will be attracted to Enterprise Zone sites given the availability of enhanced Capital Allowances. Further sites fall to be identified within the medium-term portfolio whilst the long-term portfolio is heavily influenced by Wylfa Newydd and the potential need to retain sufficient flexibility to accommodate its demands, as set out above, including for the use of 'reserve' sites.

The approach to the identification of employment land within the JLDP is therefore considered to be entirely in accordance with the wider regional strategy for employment land in that all of the allocations and safeguarded areas on the Island feature within the Regional Employment Land Strategy. A failure to include the sites could lead to a restriction in the opportunities available to businesses and a reduction in the extent to which the North Wales economy as a whole could benefit from the Wylfa Newydd project.

## Conclusion.

The Councils are of the opinion that the Plan does not over-provide for employment land given the factors explained above. The amount of new land that is allocated for employment and business use at 60ha whilst representing a 50% increase when viewed against historic trends is considered to be reasonable given the nationally unique opportunities which are likely to present themselves during the plan's lifetime.

Similarly the Council's approach to safeguarded land, which is expanded upon below, is considered to be reasonable given the opportunities outlined above. The Council is receiving an increased number of enquiries for sites and premises and where it has acted as an enabler in bringing premises forward for development they have quickly let. Safeguarding for the reasons outlined below safeguards existing businesses and enables them to plan for modernisation and expansion confident that they are supported by policy.

### 4.2 Any assessment of the implications arising from the degree to which such land is safeguarded;

Policy CYF1 includes for the identification of safeguarded employment sites together with new allocations. The policy recognises that within the plan area there is 650.1 ha where the current, predominant or primary land use is employment and business. By safeguarding these areas it is possible to protect them from erosion by other, potentially less compatible uses (see Policy CYF4).

The implications arising from the safeguarding of existing employment areas are that:

- ▶ existing jobs and investments are protected from potentially incompatible uses;
- ▶ existing businesses have policy support to expand or to modernise, to the benefit of the local economy;
- ▶ jobs continue to be located within or in close proximity to the main centres of population benefiting from a local labour market, accessibility, existing services and facilities;
- ▶ new investment in infrastructure continues to be directed to the most appropriate employment locations and

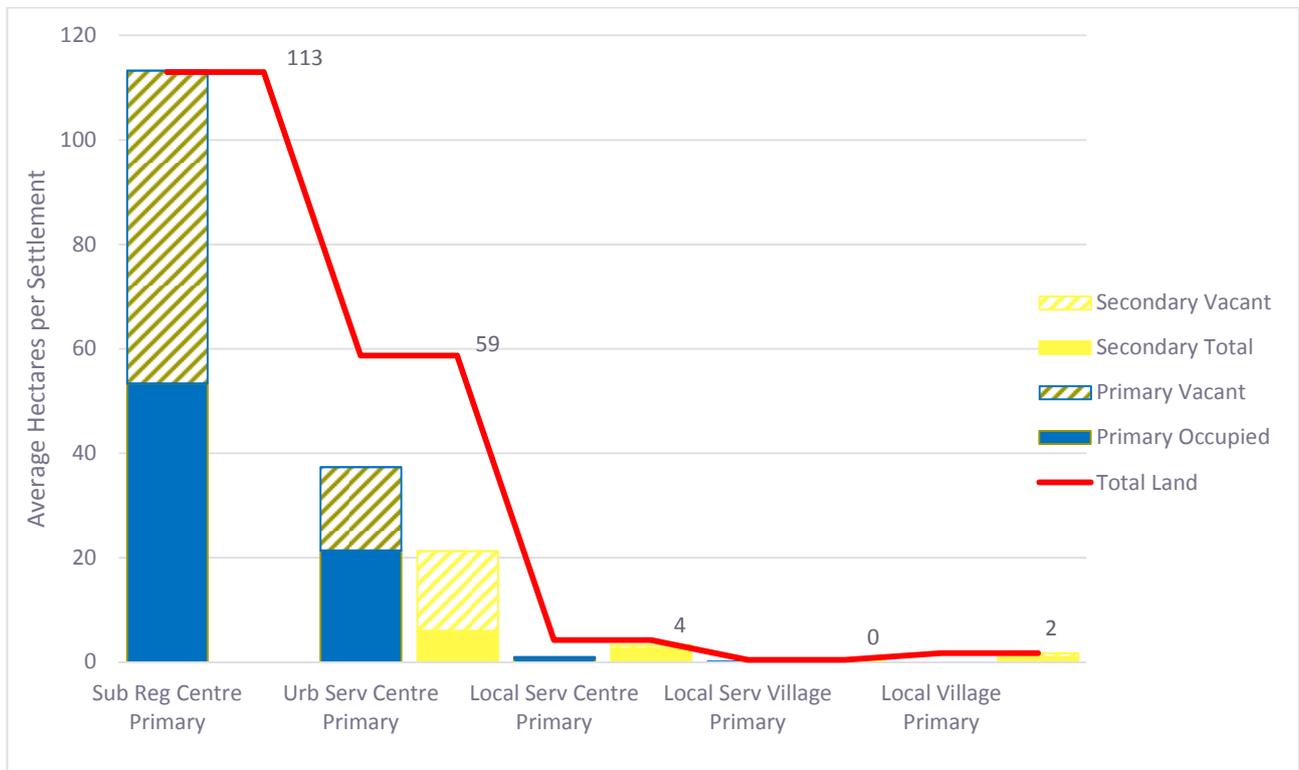
- ▶ opportunities for co-location of similar operations taking advantage of vacant sites are available.

The safeguarding of land does not prevent its use for other forms of development providing that proposals for non-employment related uses comply with Policy CYF4. The degree to which land is therefore safeguarded is one that recognises the benefits as set out above yet equally recognises that safeguarding should not be absolute and that special circumstances may apply.

The Councils are of the opinion that the degree of land safeguarded is not so significant as to prevent other, potentially more appropriate uses from developing in the most appropriate locations. Safeguarded areas are by their nature heavily commercial in character. They include for a range of business types which may include for, in the case of Bryn Cefni for example, food processing, car dealerships, police station, offices, warehousing and storage. They are not exclusively employment in the narrowest sense of Class B1, B2 and B8 uses and safeguarding is sufficiently flexible to allow for a range of employment types providing they remain consistent with policy CYF4. This flexibility is entirely consistent with TAN 23 allowing for flexibility, competition and choice.

Safeguarding employment land in addition to plan allocations does not imply an abandonment of the Councils' settlement strategy. The amount of employment land when averaged out against the different settlement categories matches the spatial hierarchy as demonstrated within Figure 1.

Figure 1 – Average supply of employment land according to settlement tiers.



Similarly the safeguarding of employment land and plan allocations reflects the Councils proposed allocations strategy for housing (Figure 2) and suggests that employment sites will continue to be safeguarded and developed within and alongside existing settlements and as such in close proximity to local workforces.

Figure 2 – Distribution of employment land and housing numbers according to settlement tiers.



### 4.3 An explanation of why the Plan differentiates between vacant land within the safeguarded sites and new allocations

As referred to earlier in this topic paper the plan differentiates between safeguarded employment land, allocated and reserved sites.

Safeguarded land includes existing building and premises in employment related uses together with land which is currently vacant but which has had a previous use as employment or has existing servicing/access provided for employment purposes eg Parc Cybi, C11. Essentially safeguarded land is maintained for the reasons set out in section 4.2 above. The Councils accept that a significant proportion of safeguarded land is vacant but is of the opinion that it is important to differentiate it from allocated land given that in many cases it is formed by serviced plots of land with a certain degree of infrastructure. Further the Councils consider that it would be inappropriate to categorise this land as allocated in order to differentiate it from the ‘strategic’ sites identified through the employment land reviews.

The strategic sites are taken forward in the plan in order to remedy identified deficiencies in the current portfolio of employment land within the Council areas. The Councils consider that they are distinct sites currently without the necessary infrastructure and different in character from the vacant land located within safeguarded areas.

In revisiting the safeguarded and allocated sites during the preparation of this paper the Council has identified what it considers to be an inconsistency in the description of Gaerwen (C33). The current allocation extends to 52.8ha of which over a half is occupied by existing businesses. The Council is of the opinion that to be consistent with its overall approach to the definition of safeguarded and allocated employment land that C33 should be subdivided into the vacant (allocated land) and the existing, occupied and therefore safeguarded land. By making this change the Council would be applying its definitions in a manner consistent with the definitions applied to

Bryn Cefni (C18) and the sites that adjoin it (C14 and C15) for example. Please view Appendix C for a location Plan of the revised employment allocation and safeguarded site.

- 4.4 To assist in undertaking the distribution of employment land a further breakdown of the figures set out in CYF1 should be provided. In addition to providing figures for the total vacant areas it should also include figures for the preliminary (primary) and the secondary sites and provide overall totals for each, as well as sub totals for each tier of the hierarchy”.

In reviewing the table the Council notes that the Business Park at Penrhyndeudraeth (C7) was placed within the category of Urban Service Centre within the CVJLDP. It has now been moved to sit under the correct category of Local Service Centre. Furthermore the Sub-regional Centre secondary sites should include only Hiracl Bay Bangor (C16). Peblig and the Former Friction Dynamex sites Caernarfon (C19 and C20) and the Tanygrisiau Site Blaenau Ffestiniog (C18) have now been placed under the category of Urban Service Centres consistent with the overall settlement hierarchy.

Following further consultation with Natural Resource Wales the Council intend on removing the undeveloped area from the safeguarded employment site C39 – Griffin Industrial Estate, Penrhyndeudraeth as a Matter Arising Change due to the sites importance for flood storage purposes. The table in Appendix CH (extract from Policy CYF1) has been amended to reflect the removal of the vacant land area from the safeguarded employment site.

The Employment site allocation table as provided within the CVJLDP Policy CYF1 has been amended to reflect the above. Please view Appendix CH.

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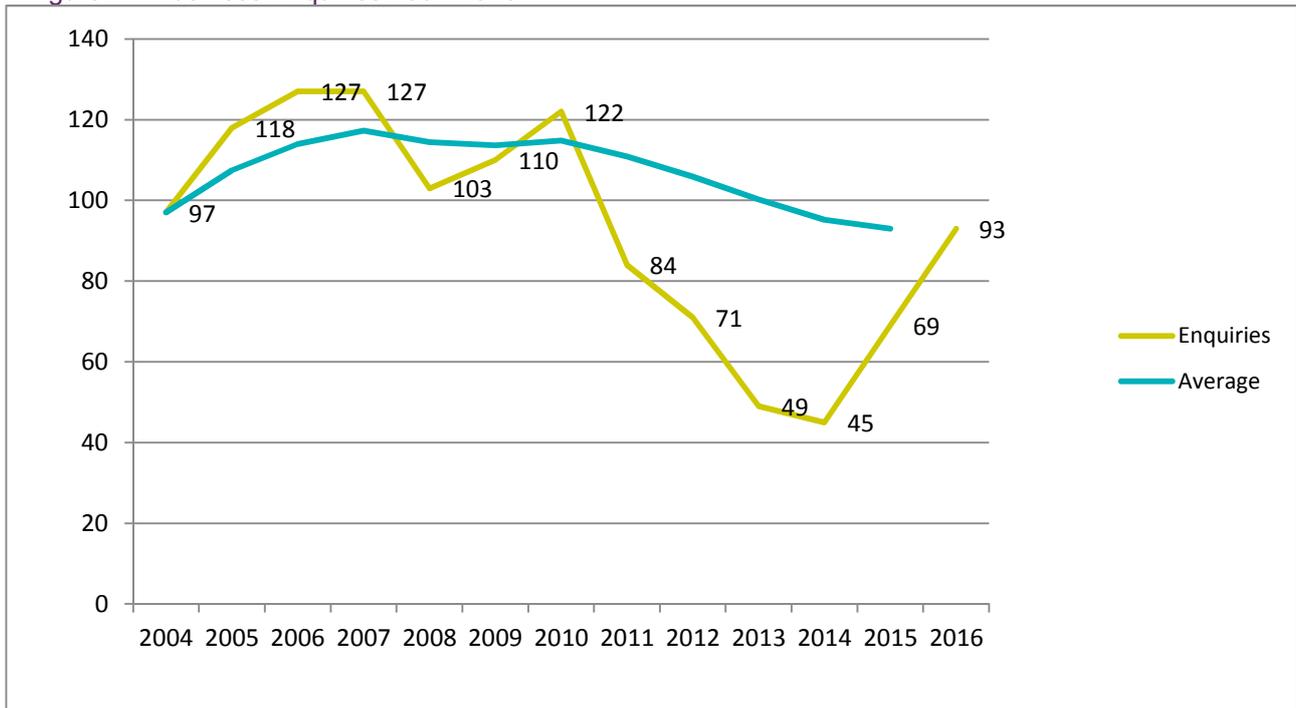
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**John Hall**

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## Appendix A Business Enquiries

Figure 4.1 Business Enquiries 2004-2016



## Appendix B

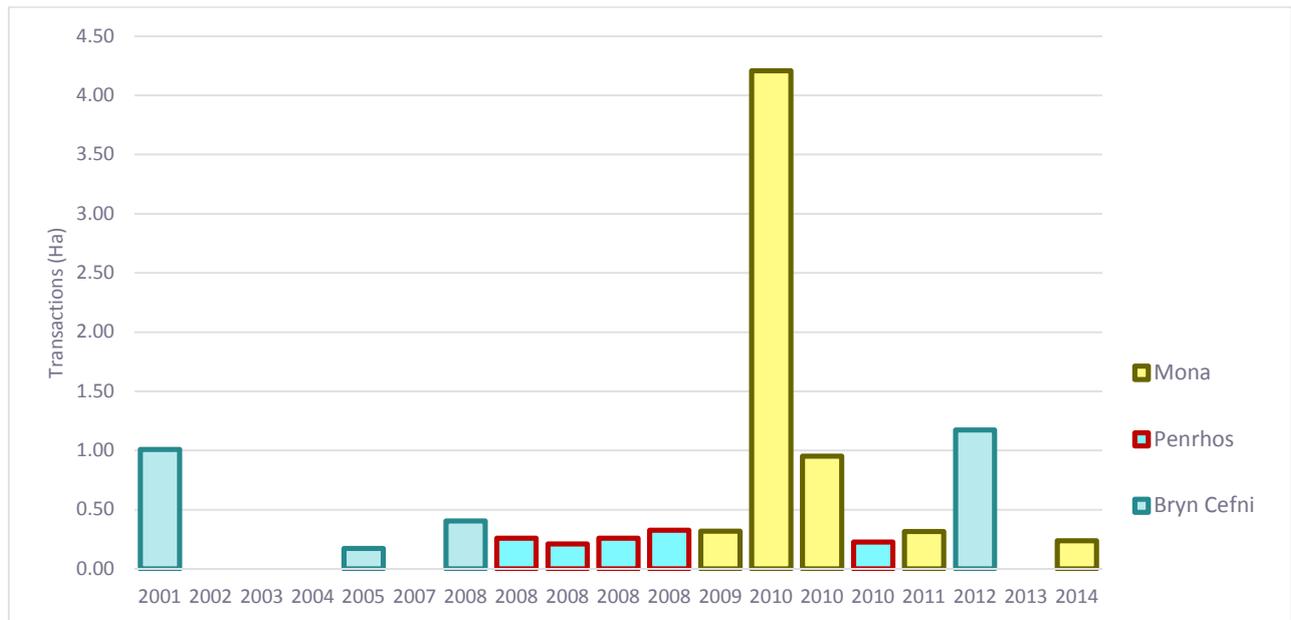
Table 4.1 Take up of IACC Employment Land

Date	Location	Transaction Reference	Acres	Hectares
2001	Bryn Cefni	WDA Plot - CYM30888 - Bryn Cefni	2.49	1.01
2002			0.0	0.00
2003			0.0	0.00
2004			0.0	0.00
2005	Bryn Cefni	GD Components - CYM296236 - Bryn Cefni	0.43	0.17
2007			0.00	0.00
2008	Bryn Cefni	Barton Nichols - CYM459339 - Bryn Cefni	1.00	0.40
2008	Penrhos	DU Construction - CYM419866 - Penrhos	0.64	0.26
2008	Penrhos	Quayside - CYM427911 - Penrhos	0.52	0.21

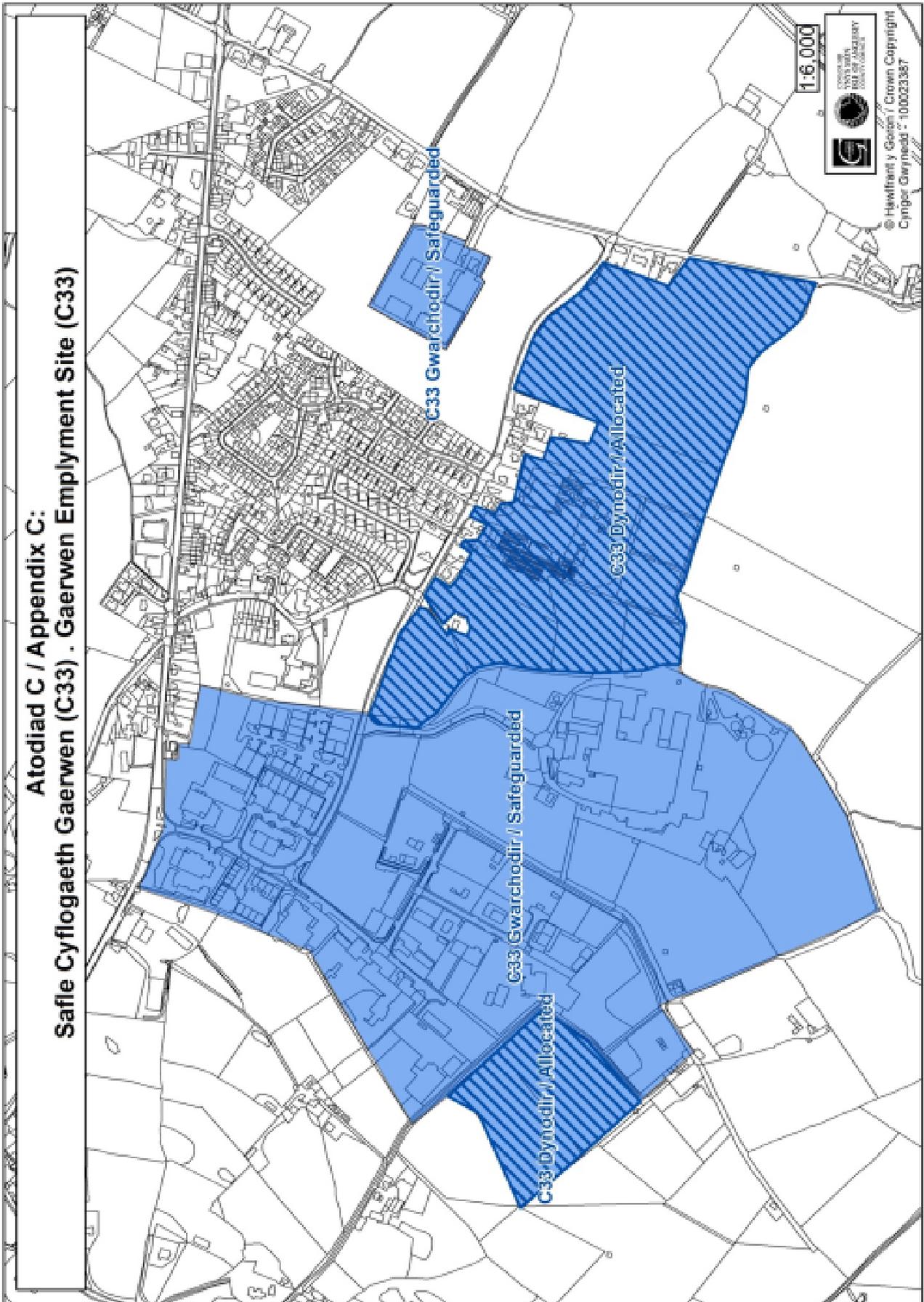
2008	Penrhos	Cocon Construction - CYM427031 - Penrhos	0.64	0.26
2008	Penrhos	Goodsir Coaches - CYM426051 - Penrhos	0.81	0.33
2009	Mona	Eifion's Coaches - CYM467797 - Mona	0.79	0.32
2010	Mona	Anglesey Eco Park - Mona	10.4	4.21
2010	Mona	OR Jones & Sons - CYM538500 - Mona	2.35	0.95
2010	Penrhos	Nigel Dennis - CYM511560 - Penrhos	0.56	0.23
2011	Mona	AMP Construction - CYM365645 - Mona	0.78	0.32
2012	Bryn Cefni	CL Jones - CYM520878 - Bryn Cefni	2.9	1.17
2013			0.00	0.00
2014	Mona	Nova Chrome UK - CYM536503 - Mona	0.59	0.24
<b>TOTAL</b>			<b>24.90</b>	<b>10.08</b>

In addition to the above, IACC constructed 7 business units at Bryn Cefni, Llangefni in 2015, all subsequently let. As of July 2016 IACC owned plots totalling 3.1ha are in the process of being sold.

Figure 4.2 Employment Land Transactions 2001 to 2014



The pattern of take up suggests a response to the availability of new sites which offer a competitive advantage of those already existing. The average land take up for the period is 0.72 hectares.



# Appendix CH

## Revised Safeguarded and Allocated Employment Tables – Policy CYF1

Safeguarded Sites:-

	Spatial Strategy	Site	Map reference	Vacant land area (ha) <sup>1</sup>	Total Area (ha)	Use	Enterprise Zone Site	Regional Plan Status	
Primary Sites	Sub-regional Centre	Parc Bryn Cegin, Bangor	C1	36	36	B1, B2, B8	Not applicable	Strategic Regional Site	
		Llandygai Industrial Estate, Bangor	C2	4	27.6	B1, B2, B8	Not applicable	Not applicable	
		Parc Britannia, Bangor	C3	0	7.9	B1	Not applicable	Not applicable	
		Parc Menai, Bangor	C4	13.2	32.9	B1	Not applicable	Strategic Sub-regional Site (Secondary)	
	Urban service Centre	Cibyn Industrial Estate, Caernarfon	C5	7.3	37.7	B1, B2, B8	Not applicable	Strategic Sub-regional Site (Main)	
		Adwy'r Hafan, Pwllheli	C6	1.5	10.5	B1, B8	Not applicable	Not applicable	
		Business Park, Porthmadog	C8	4	13.5	B1, B2	Not applicable	Not applicable	
	Local Service Centre	Pendre Estate, Tywyn	C9	2.7	7.9	B1, B2	Not applicable	Not applicable	
		Business Park, Penrhyndeudraeth	C7	3.1	11.5	B1	Not applicable	Not applicable	
	Anglesey	Urban Service Centre	Parc Cybi, Holyhead	C11	53	109.2	B1, B2, B8	Yes	Strategic Regional Site (Main)
			Penrhos Industrial Estate, Holyhead	C12	2.69	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	
Secondary Sites	Sub-regional Centre	Hirael Bay, Bangor	C16	6.72	9.1	B1	Not applicable	Not applicable	
		Urban Service Centre	Pebelig, Caernarfon	C19	2.2	6.7	B2	Not applicable	Not applicable
			Former Site of Friction Dynamex, Caernarfon	C20	3	14.6	B2, B8	Not applicable	Not applicable
			Tanygrisiau Site, Blaenau Ffestiniog	C18	2.7	7.4	B1, B2, B8	Not applicable	Not applicable
	Local Service Centre	Felin Fawr, Bethesda	C17	0.4	1.5	B2	Not applicable	Not applicable	
		Glyn Rhonwy, Llanberis	C21	3.3	29.8	B1, B2, B8	Not applicable	Not applicable	
		Penygroes Industrial Estate	C23	4.3	10	B1, B2,	Not applicable	Not applicable	

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

	Spatial Strategy	Site	Map reference	Vacant land area (ha) <sup>1</sup>	Total Area (ha)	Use	Enterprise Zone Site	Regional Plan Status
Ynys Môn						B8		
		Nefyn Industrial Estate	C25	1.7	3.5	B1, B2, B8	Not applicable	Not applicable
		Former Site of Ysbyty Bron y Garth, Penrhyndeudraeth	C22	0.7	1.6	B1	Not applicable	Not applicable
		Griffin Industrial Estate, Penrhyndeudraeth	C39	0	4	B1, B2, B8	Not applicable	Not applicable
	Service Villages	Y Ffôr Industrial Estate	C27	2.8	2.8	B2	Not applicable	Not applicable
	Local Villages	Agricultural Park, Llanystumdwy	C24	1.5	6.6	B1, B2, B8	Not applicable	Not applicable
	Open Countryside	Wynnstay Farmers site, Rhosfawr	C26	1.4	4.9	B2	Not applicable	Not applicable
	Urban Service Centre	Former Shell land, Amlwch	C28	7	19.3	B2, B8	No	Not applicable
		Llwyn Onn Industrial Estate, Amlwch	C29	3.16	15	B1, B2, B8	No	Not applicable
		Anglesey Aluminium land, Holyhead	C30	81.7	90.5	B1, B2, B8	Yes	Strategic Regional Site (Main)
		Former site of Eaton Electrical, Holyhead	C31	2	2	B1, B2	No	Not applicable
		Kingsland site, Holyhead	C32	0.8	0.8	B1, B2, B8	No	Not applicable
	Local Service Centre	Gaerwen Industrial Estate	C33	13.8	39.5	B1, B2, B8	Yes	Strategic Regional Site (Main)
	Open Countryside	Land near Mona airfield, Mona	C34	8.9	20.5	B2, B8	No	Not applicable

Allocated Sites:-

	Site	Map reference	Total Area (ha)	Use	Enterprise Zone Site	Regional Plan Status
Urban Service Centre	Land to the north of Lledwigan farm, Llangefni	C14	20.6	B1, B2, B8	Yes	Strategic Regional Site (Main)
	Land in the Creamery, Llangefni	C15	4.9	B1, B2, B8	Yes	Strategic Regional Site (Main)
Local Service Centre	Gaerwen Industrial Estate, Gaerwen	C33	20.2	B1, B2, B8	Yes	Strategic Regional Site (Main)
	Menai Science Park, Gaerwen <sup>2</sup>	C38	7.6	B1 <sup>4</sup>	Yes	Strategic Regional Site (Main)
Service Village	Adjacent to the petrol station, Y Ffor	C10	1.7	B1, B2, B8	Not applicable	Not applicable