

Final report
3 December 2024

Anglesey Land Holdings Ltd.

Redevelopment of former Penrhos
Aluminium Works Site known as
Prosperity Parc
Economic Impact Assessment



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1. Executive summary

- 1.1.1. The construction of the proposed development is aligned to the objectives of multiple national and local government planning and economic development objectives.
- 1.1.2. It could directly help to facilitate the expansion of high-value, high-productivity sectors, create jobs and investment, and be complementary to efforts to support and provide opportunities for other value-adding sectors and industries. It can play a key role in the continued development and diversification of the economy of Anglesey.

1.2. Social

- 1.2.1. The proposed development, Prosperity Parc, will help to reverse the trend of declining industry in Anglesey and help to provide the infrastructure for other industrial developments such as offshore wind and the Freeport at Holyhead. It will also create a minimum of 1,151 jobs per annum once established and fully operational, producing wider benefits in the supply chain and through employee spending. These gains are recognised as indirect and induced benefits and provide a total of 1,219 FTE roles in the locale. In the high case the site is expected to deliver 2,228 FTE direct, indirect and induced posts.

1.3. Economic

- 1.3.1. The development will provide both one-off and ongoing net impacts:

Construction (one-off impact¹) Anglesey

Investment	+£1.0Bn
Net GVA	+£60.1M direct, indirect, and induced
Employment	+890 FTE years direct, indirect and induced

Onsite operations (ongoing, annual impact²) Anglesey – low employment

Output	+£153M
Net GVA	+£108M direct, indirect and induced
Employment	+1,219 FTEs direct, indirect and induced

Onsite operations (ongoing, annual impact) Anglesey – high employment

Output	+£408M
Net GVA	+£274M direct, indirect and induced
Employment	+2,228 FTEs direct, indirect and induced

¹ A one-off economic benefit refers to a single, non-recurring financial or economic gain generated by a specific event, activity, or project. Unlike ongoing or sustained economic benefits, one-off benefits happen only once and do not provide continuous value over time. With construction activity the economic impacts including employment, earnings and GVA are limited to discrete building of Prosperity Parc.

² An ongoing economic impact refers to the continuous and recurring financial or economic benefits generated by an activity, event, project, or investment over time. Unlike one-off economic benefits, ongoing impacts contribute to sustained economic growth, employment, and income within a community, region, or economy.

1.3.2. This development is a constituent part of the wider regeneration and redevelopment work envisioned to take place on Anglesey in the coming years and can deliver positive economic impacts.

1.3.3. The local skills, training and education initiatives emerging from the wider Freeport are likely to be directly relevant and complementary to site-specific employment and skills measures which could be secured via the planning process.

1.4. Summary net economic impacts

1.4.1. Construction – one-off impacts

(£M)	Anglesey	Wales (inclusive Anglesey)	UK (inclusive Wales)
Net GVA	60.1	738.7	1,129.1
Net earnings	26.5	333.3	516.4
Net FTEs	890	10,978	15,680

1.4.2. Ongoing annual net impacts – low employment

(£M)	Anglesey	Wales (inclusive Anglesey)	UK (inclusive Wales)
Net GVA	109	55	75
Net earnings	53	29	38
Net FTEs	1,219	481	677

1.4.3. Ongoing annual net impacts – high employment

(£M)	Anglesey	Wales (inclusive Anglesey)	UK (inclusive Wales)
Net GVA	274	263	358
Net earnings	135	136	180
Net FTEs	2,228	2,283	3,212

1.4.4. For clarity, the net values shown are inclusive of the benefits recorded at smaller spatial levels. The reported results are a function of the gross impacts associated with activities at Prosperity Parc and recognise increasing levels of leakage and displacement at the Wales and UK levels.

1.4.5. In all cases the values shown are gains associated with Prosperity Parc over the status quo.

2. Introduction

2.1. Background

- 2.1.1. Anglesey Land Holdings Ltd. intends to apply for outline planning permission for the redevelopment of the former Penrhos Aluminium Works site (known as 'Prosperity Parc'), to include data centre use (B8), with office and research & development space (B1), and the inclusion of a Battery Energy Storage System (BESS) scheme, with access, landscaping, drainage and associated works, including demolition of existing buildings at the former Penrhos Aluminium Works Site, London Road, Holyhead.
- 2.1.2. The application is submitted in response to a number of factors, including the site's allocation as a safeguarded employment site via Policy CYF1 in the Joint Local Development Plan, as well as the site's inclusion in the Anglesey Freeport which is being taken forward by a range of partners.
- 2.1.3. Pre-application discussions with Isle of Anglesey County Council confirmed the need for the application to be accompanied by an Economic and Social Impact Assessment to evidence the potential benefits that Prosperity Parc can deliver, at local and national levels.
- 2.1.4. The site is located off London Road (A5) and is strategically placed in close proximity to the A55 North Wales Expressway (junction 2) and sits on the edge of Holyhead, a key international Port in Wales and the UK. The site is an allocated employment site in the adopted local plan.



Figure 1 Proposed illustrative masterplan

- 2.1.5. The proposal would see the site brought back into economic use through new employment uses in a range of economic sectors, creating new job opportunities. The site also forms one part of a wider Freeport strategy and vision for regeneration and investment across Anglesey.

2.2. Need for data centres

- 2.2.1. The core offer of the new site is as data centre. A data centre is a facility that houses a large number of servers and associated hardware for the purpose of storing, managing, and processing data. It serves as the backbone of digital infrastructure, supporting everything from internet services and cloud computing to artificial intelligence and large-scale business operations.
- 2.2.2. There is a global surge in demand for data centres, driven by the rapid expansion of digital services, cloud computing, and emerging technologies like artificial intelligence (AI). This growth is evident in several key developments:
- In the first quarter of 2024, data centres across major European markets, including London, witnessed unprecedented take-up and new supply, with demand consistently outstripping supply;
 - US technology firms have committed over £6.3 billion to expand data centre infrastructure in the UK, aiming to support the growing need for AI capabilities and digital services; and
 - UK Government has recognised data centres as critical infrastructure required to ensure the nation's digital resilience.
- 2.2.3. In conclusion, the UK's digital economy's rapid growth underscores the necessity for additional data centres to meet escalating demand and maintain global competitiveness.

3. Location

3.1. Anglesey / Ynys Môn

- 3.1.1. The Isle of Anglesey (Ynys Môn) is an island off the North West coast of Wales and one of the 22 unitary authorities of Wales. The island is connected to mainland Wales via the Menai Strait, creating the Island's only border with mainland Wales and county Gwynedd. Anglesey itself comprises the bulk of the county known as the Isle of Anglesey, but it also includes Holy Island and several smaller islets. Anglesey and the smaller islands are sparsely populated, with the only major settlements being Holyhead and Llangefni. The rest of the county is comprised of smaller towns and villages.
- 3.1.2. Anglesey, as with much of Wales, used to be a centre for mining and other heavy industries. At one point it was home to one of the largest copper mines in the world, a Magnox Nuclear power plant, the 2 Sisters chicken processing plant, and Anglesey Aluminium.
- 3.1.3. The regeneration of Anglesey could be significantly boosted by proposed large-scale developments. Emerging proposals include the potential construction of the UK's third large-scale nuclear power station and the development of multiple sites designated within the Freeport.
- 3.1.4. The original nuclear plant at Wylfa ceased energy production in 2015; it is now a preferred location for a new nuclear facility. The Wylfa project could bring thousands of jobs and large investment to the area. The Welsh and UK Governments have also approved Anglesey's bid to become a Freeport; the outline business case has been approved and the completion of the full business case will unlock £26M of UK Government funding, bolstering both Anglesey's economy and the prosperity of communities across North Wales. Given these developments, Prosperity Parc could provide a base for organisations supporting these transformational developments.
- 3.1.5. The proposed Prosperity Parc development is in Holyhead (on Holy Island), the most populated settlement on Anglesey with a population of 12,000.

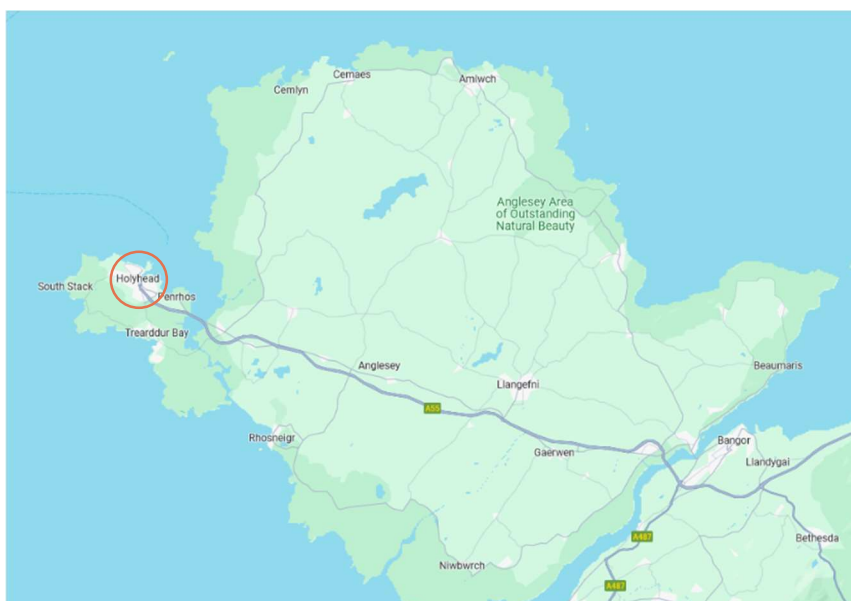


Figure 2 Map of Anglesey, with Holyhead highlighted

3.2. Infrastructure

- 3.2.1. Holy Island is connected to Anglesey via road by the Stanley Embankment and the Four Mile Bridge. Anglesey is connected to mainland Wales by the Britannia Bridge, which carries the A55 (known as the North Wales Expressway) and connects Holyhead to North West England and the Menai Suspension Bridge, which carries the A5 (Holyhead-London trunk road).
- 3.2.2. There are six railway stations on Anglesey (one in Holyhead), all of which are on the North Wales Coast Line. There are direct services from Holyhead to London Euston which take less than four hours, operated by Avanti West Coast. The trainline also connects Anglesey to Chester (estimated 1 hour 40 minutes from Holyhead), Manchester (estimated 3 hours from Holyhead), Birmingham (estimated 3 to 4 hours from Holyhead), and Cardiff (estimated 5 hours from Holyhead). The North Wales Coast Line has stations at major settlements along the north coast of Wales in the local authorities of Gwynedd, Conwy, and Denbighshire. Stations in Gwynedd and Conwy can be reached in under an hour from Holyhead; these include Bangor, Llanfairfechan, Penmaenmawr, Conwy, Colwyn Bay, and Pensarn. Stations in Denbighshire can be reached in little over one hour, these include Rhyl and Prestatyn.
- 3.2.3. Until 2020, there were twice-daily flights from Anglesey Airport to Cardiff Airport. These were suspended during the COVID-19 pandemic, and, following a 2022 review by the Welsh Government, flights were not reinstated.
- 3.2.4. Holyhead is also home to one of the busiest ports in the UK, which connects Wales to Ireland across the Irish Sea. This includes a commercial and ferry port operated by Stena Line Ports Ltd., acting as the principal transport link between Ireland and North Wales and Central and Northern England. The port handles over two million passengers every year.
- 3.2.5. Most major settlements in Gwynedd, Conwy, and Denbighshire are within a one-hour driving distance of Holyhead. The following map shows the distance that can be reached by car in one hour from Holyhead:

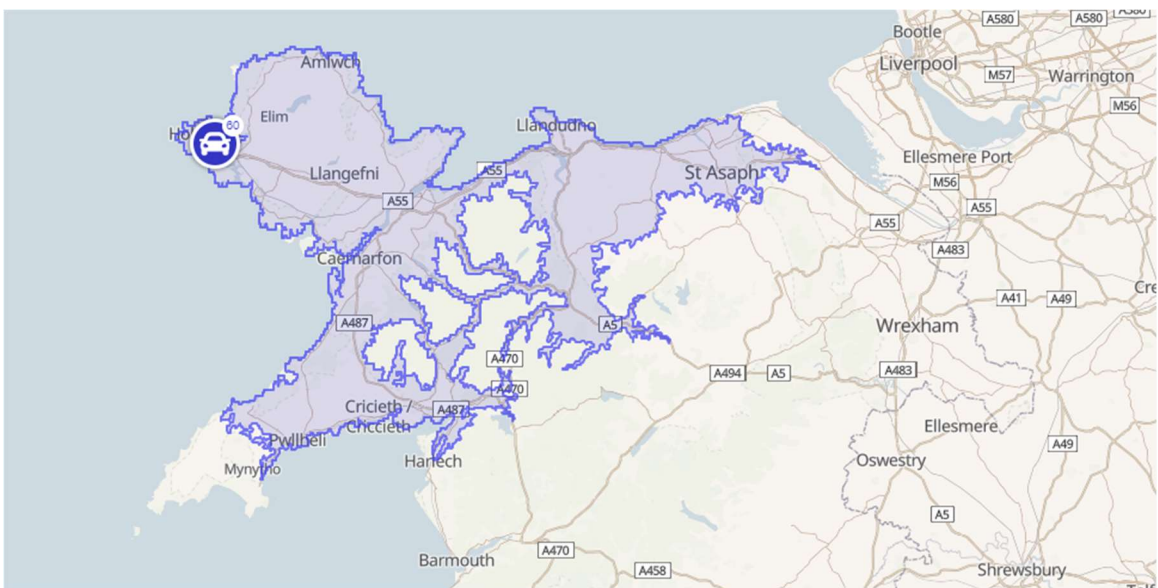


Figure 3 Map highlighting areas within a one-hour driving distance from Holyhead

4. Employment losses and potential opportunities

4.1. Losses

- 4.1.1. Industry has declined in recent years on Anglesey with the loss of major employers and the decommissioning of several significant sites. However, there are new opportunities for growth in the area with potential for offshore wind and the redevelopment of brown field sites. It is estimated that c20% of employment in the region has been lost on Anglesey due to various economic challenges since 2000. Significant events are described below.
- 4.1.2. Wylfa Power Station: Wylfa Power Station was a nuclear power station built off the coast of Anglesey in the 1960s. Its last reactor closed in 2015 and it began a process of decommissioning. In 2021 there were 252 employees working at the site, reduced from c650 in 2015.
- 4.1.3. In 2009, Horizon Nuclear Power announced plans to develop a new reactor at the site called Wylfa Newydd. In 2012, Hitachi proposed to buy Horizon Nuclear Power in a £700M deal, with estimates that a potential 8,000 jobs³ would be created for reactor construction and 850 jobs¹ for site operations. However, in 2019 the plans were paused and scrapped entirely in 2021.
- 4.1.4. Rehau Factory: The plastics factory owned by Rehau began decommissioning in 2019. The factory was in Amlwch and was a major Anglesey employer, with over 100 jobs lost in decommissioning. The factory site has recently been purchased by Pi Real Estate with plans to convert the site into office, workshop and warehouse space to accommodate a range of businesses.
- 4.1.5. 2 Sisters: 2 Sisters ran a chicken processing plant in Llangefni for over 50 years, employing over 700 people. The plant closed in March 2023, with 2 Sisters reporting that the plant was outdated (it was one of the company's smaller facilities) and lacked the space to operate efficiently. Additionally, it would have required significant investment to modernise the plant to meet the standards of other facilities in the company's portfolio.
- 4.1.6. The company decided to consolidate operations, focusing on other more cost-effective and efficient sites. Rising costs, particularly energy costs, were also mentioned as major contributors to the decision to close the plant.
- 4.1.7. Anglesey Aluminium: Once a major employer in the Holyhead area, the aluminium smelting operation began decommissioning in 2009, resulting in a loss of c400 jobs. A remaining 80 staff stayed on to oversee the decommissioning process but most subsequently lost their jobs in 2013.
- 4.1.8. After the smelting operation ceased, the land was developed and bought by Orthios to run an 'eco park' on the site. This, however, closed in 2022 and resulted in a loss of 140 jobs. The company had promised to bring in 500 permanent jobs at the site and create 1,200 during construction.

³ <https://publications.parliament.uk/pa/cm201719/cmselect/cmwelaf/1938/full-report.html>

4.2. Opportunities

- 4.2.1. The strategic location of the Island has been recognised in recent years, with associated opportunities for regeneration and regrowth. The site is allocated for employment uses (B1, B2 and B8) in the adopted Local Plan which is clear about its suitability for redevelopment to deliver new investment and jobs. Opportunities are described below.
- 4.2.2. Wylfa site: In 2023, the UK Government bought the Wylfa site from Hitachi for £160M as the Government's preferred site for a new nuclear power station. It could be the UK's third mega-nuclear power station. Since then, the UK Government has announced that it has begun discussions with energy companies about the plant's construction. The UK Government's Energy Secretary announced that the site could provide thousands of jobs. For comparison, the construction at the Hinkley site in Somerset (which would be a similar scale project to that at Wylfa) employed c6,300 staff in 2021.
- 4.2.3. Holyhead Freeport: It was announced in early 2024 that a Freeport would be opened in Holyhead, creating up to 20,000 jobs and bringing in investment worth £5 billion. The Freeport would work with the existing busy port at Holyhead to create a hub for import and export trade through the simplified customs system offered to a Freeport and the tax and duty relief.
- 4.2.4. This has the potential to benefit a number of other sectors as the customs-free designation of a Freeport encourages the storage and processing or manufacturing of imported goods to be conducted within the area of the Freeport itself. As such, there is major scope for secondary economic development and employment from this Freeport.
- 4.2.5. Offshore wind: A new successful lease has been approved just off the coast of North Wales, with project aims to construct an offshore wind farm. The project will be developed by EnBW and BP (both large energy firms). The agreement has signed for six offshore wind projects, with one plant being just north-east of Anglesey, named Mona (1,500 MW). Mona is a large project that will bring large local employment and job opportunity, as well secure more resilient and affordable energy supply for the area.
- 4.2.6. Penrhos Industrial Estate: The Penrhos site was opened in 2020 with 10 new business units and occupants, including construction and maintenance industries. The site expanded by seven units in 2022 and the final phase of the development was completed in 2024 with a further six units. This development has allowed for the expansion of industry in the locale and will provide opportunities for businesses, increasing economic activity and bringing jobs to the area.
- 4.2.7. Parc Cybi: Parc Cybi, by Holyhead and Prosperity Parc, is currently a site for a HMRC Inland Border Facility. It is soon to include a Welsh Government Border Control Post which will be used to inspect goods entering Wales from the EU via Holyhead Port. Similar to Prosperity Parc, this site is being developed for greater commercial use with land allocated for B1, B2, and B8 use classes.

4.3. Conclusion

- 4.3.1. Anglesey has lost a significant number of major employers and seen the decommissioning of a range of industrial sites in recent decades, leading to the loss of local jobs. However, the delivery of sites allocated in the Local Development Plan, and developments around the Freeport and potential for a new nuclear power station will

help to stimulate economic growth. These developments have the potential to complement and support the delivery of (and demand for) the proposed uses proposed at Prosperity Parc and the associated direct, indirect and induced economic benefits in the coming years.

5. Anglesey: Socioeconomic background

5.1. Deprivation

5.1.1. The WIMD is the Welsh Government's official measure of relative deprivation for small areas in Wales. The country is separated into 1,909 areas, each with an average population of 1,600 people. Each zone is ranked relative to all other zones based on its overall degree of deprivation. The full index is updated every 4-5 years, with the most recent index published in 2019.⁴ Deprivation refers to a lack of access to opportunities and resources, with a focus on eight different areas of deprivation:

- | | |
|---------------|-------------------------|
| 1. Income | 5. Access to services |
| 2. Employment | 6. Housing |
| 3. Health | 7. Community safety |
| 4. Education | 8. Physical environment |

5.1.2. The Isle of Anglesey local authority area is split into 44 smaller areas in the WIMD analysis.⁵ Of these 44 areas only 2.3% (one area) is designated 'most deprived', defined as the top 10% for prevalence of deprivation indices. The areas with the most concentrated deprivation are around Holyhead, with Holyhead Town ranking 168/1909 for relative deprivation. The primary issues that Holyhead Town faces are for income and employment deprivation where it ranks in the ranks in the top 10% of deprived communities in Wales.⁶

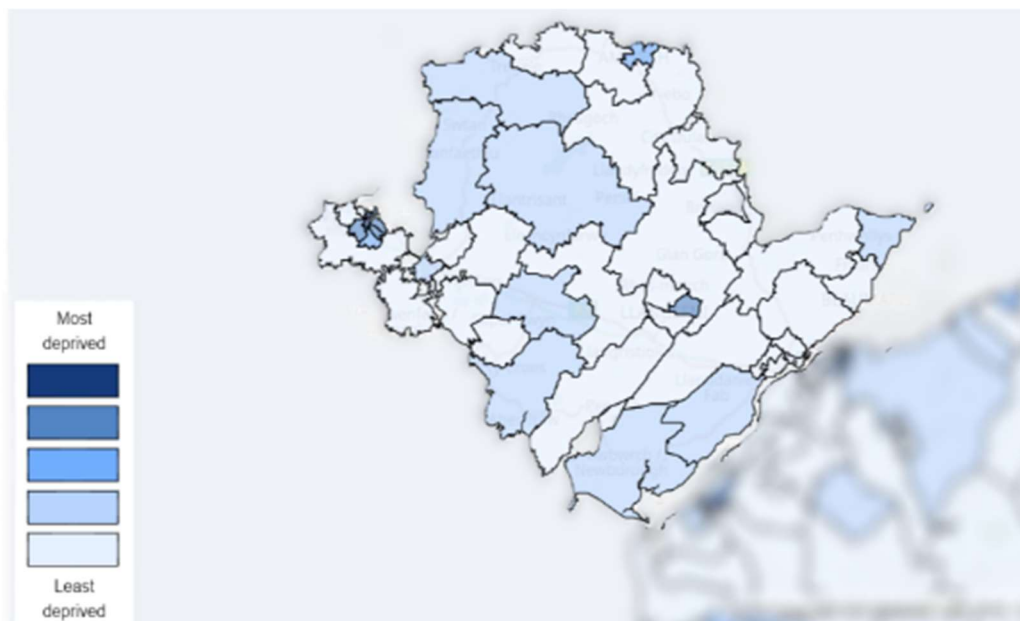


Figure 4 Map of Anglesey showing SIMD ranking

⁴ WIMD 2019: Results report

⁵ StatsWales: WIMD Maps from 2019

⁶ WIMD: Holyhead Town (W01000016)

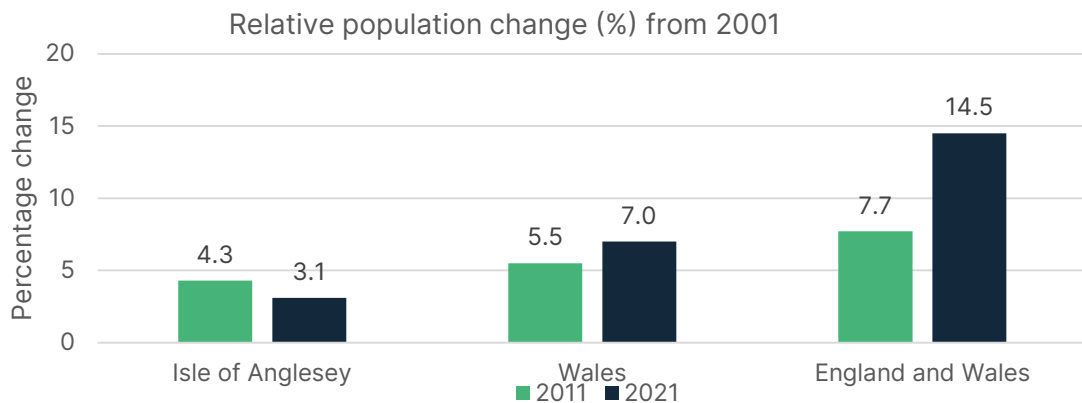
5.2. Demographics

5.2.1. Population

5.2.1.1. The population of the Isle of Anglesey is 68,875.⁷ This population is mostly concentrated in the settlements of Holyhead, Llangefni and Amlwch. 26% of the population is over 65, (compared to the 19% average across England and Wales). This population segment has grown in recent years, with the number of residents aged 65+ increasing from 15,646 in 2011 to 18,205 in 2021.⁸

(% of total population)	0-15	16-64	65+
Isle of Anglesey	17	57	26
Wales	18	61	21
England and Wales	18	68	19

5.2.1.2. The total population of Anglesey has decreased in recent years, which contrasts with the record high population of England and Wales in 2021. Between the 2011 and 2021 census, the population of Anglesey decreased by 1.2% from 69,751 to 68,878. The following graph highlights the difference in population growth for Anglesey compared to Wales and England and Wales, between 2001 and 2011, 2001, and 2021.



5.2.2. Working age population (16-64)

5.2.2.1. The working age population (57%) is smaller on Anglesey than Welsh (61%) and Great Britain levels (63%). This population has declined by 7.9% since the last census from 42,244 (2011) to 38,939 (2021).⁹ The following chart shows economic activity status.¹⁰

(%)	Anglesey	Wales	Great Britain
Employees	60.5	64.9	66.1
Self – employed	13.9	8.4	9.2

⁷ Census 2021: Isle of Anglesey Local Authority

⁸ Census 2021: How life has changed on the Isle of Anglesey

⁹ Census 2021

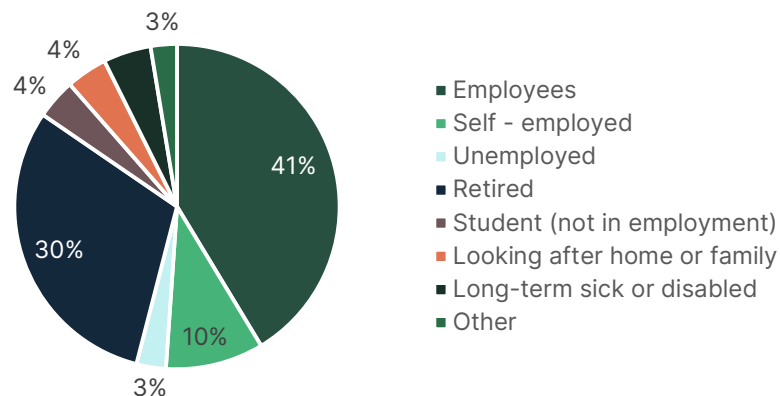
¹⁰NOMIS. Note: 'Retired' refers only to those who are retired and under the age of 64.

(%)	Anglesey	Wales	Great Britain
Unemployed	3.6	3.4	3.9
Retired	3.9	3.2	2.9
Student (not in employment)	6.0	5.5	5.7
Looking after home or family	3.9	4.2	4.1
Long-term sick or disabled	5.5	8.1	5.8
Other	1.8	2.8	2.9

5.2.3. Workforce – levels of activity

5.2.3.1. Whilst the working age population on Anglesey is smaller than that across Wales and Great Britain as a whole, it has a higher level of economic activity.¹¹ The 33,400 economically active working age people on Anglesey equate to 79% of the population, this is higher than the rate of 76% in Wales and comparable to the 79% rate across Great Britain. 31,600 are in employment with 1,200 unemployed (3.6%).

5.2.3.2. The overall levels of economic activity for all persons over the age of 16 are shown in the following graph.¹²



5.2.3.3. Those that are currently economically inactivate on Anglesey are unlikely to soon enter the workforce (other than students).

5.2.4. Employment and earnings

5.2.4.1. The unemployment rate on Anglesey was 3.8% in December 2023,¹³ an increase on the year previous (2.9%). This is in line with the increase in unemployment rates across Wales and the rest of the UK.

¹¹NOMIS. Note: economically active is defined as being either employed (including self-employed) or unemployed. Economically inactive refers to all other persons including (but not limited to) students, retirees, long-term sick or those that are otherwise unable to work, etc.

¹² Census 2021

¹³ ONS (2024): Employment, unemployment and economic inactivity on the Isle of Anglesey

5.2.4.2. The unemployment rate on Anglesey has been at or around the Wales and Great Britain level over recent years:

(%)	Anglesey	Wales	UK
2018	3.9	4.5	4.2
2019	4.0	4.1	3.9
2020	4.0	3.7	4.7
2021	4.5	4.2	4.4
2022	2.9	3.0	3.6
2023	3.8	3.7	3.7

5.2.4.3. The average gross weekly wage for full-time employment on Anglesey (2024) is £703, which is higher than the Welsh average (£695), but marginally lower than the Great Britain average (£710).¹⁴

5.2.4.4. Labour productivity (measured in GVA per hour worked) on Anglesey as of 2022 was £31.7 per hour. This is 3.5% lower than on the Welsh level (£32.8 per hour) and 25.2% lower than on the UK level (£39.7 per hour).¹⁵ This highlights a potential need for more high skilled and productivity jobs on Anglesey.

5.2.4.5. Of the employee jobs on Anglesey (2023), 8,000 are part-time, which is a rate of 38%. This is higher than the Welsh rate (35%) and the Great Britain rate (31%). This suggests that Anglesey may be experiencing levels of under-employment. This, in contrast to unemployment, is when people are in work, but this work may not be related to their skills and/or may not offer them sufficient hours. If this is the case then it is possible that there are people working on Anglesey that are looking for more secure, higher skilled and full-time work.

5.2.4.6. Job density¹⁶ on Anglesey is 0.73, which is marginally lower than Wales at 0.78 and Great Britain at 0.87. Job density is the ratio of job to working aged people (16-64), meaning that Anglesey has fewer jobs per working age person than the Welsh and British average.

5.2.4.7. Further analysis shows that a significant portion of the working age population commute away from the Island for work; as of 2023, of the total number of working residents on Anglesey, 8,400 commuted off the Island for work with only c3,000 workers commuting onto the Island for work.¹⁷ This is a net difference of c5,400 jobs, highlighting the potential lack of suitable local employment.

5.2.5. *Industry and employment*

5.2.5.1. The following table shows the ranking of industries on a local (Isle of Anglesey), regional (Wales) and national (Great Britain) level as a percentage of the working age population in each industry as of 2022.¹⁸

¹⁴ NOMIS: Labour Market Profile - Isle of Anglesey

¹⁵ ONS (2024): Subregional productivity: labour productivity indices by UK ITL2 and ITL3 subregions

¹⁶ Job density is the ratio of total jobs to population aged 16-64.

¹⁷ StatsWales: Commuting patterns by Welsh local authority and measure

¹⁸ NOMIS

Industry (%)	Anglesey	Wales	Great Britain
Wholesale / Retail Trade; Repair of Motor Vehicles / Motorcycles	16.7	13.2	14.0
Accommodation / Food Service Activities	16.7	8.8	8.0
Human Health / Social Work Activities	11.9	15.4	13.5
Manufacturing	11.9	10.8	7.6
Education	8.3	9.1	8.6
Construction	6.0	4.9	4.9
Transportation / Storage	6.0	4.2	5.0
Public Administration / Defence / Social Security	4.8	8.2	4.7
Administrative / Support Service Activities	4.3	6.8	9.0
Professional, Scientific / Technical Activities	3.3	5.2	9.1
Arts / Entertainment / Recreation	2.9	2.7	2.4
Water Supply / Sewerage, Waste Management	2.1	1.0	0.7
Real Estate Activities	1.9	1.5	1.9
Information / Communication	1.4	2.4	4.6
Mining / Quarrying	0.5	0.2	0.2
Financial / Insurance Activities	0.5	3.0	3.3
Electricity, Gas, Steam / Air Conditioning Supply	0.1	0.5	0.4
Other Service Activities	1.9	2.0	2.0

- 5.2.6. The major employers on Anglesey are those traditionally associated with tourism (including Wholesale and Retail Trade, Accommodation, Food Service) and traditional public sector activities (Human Health, Social Work, Public Administration).
- 5.2.7. The Manufacturing, Construction and Logistics sectors are significant employers, all having representation above the Wales and UK norms. These strengths could be legacy effects from previous economic activity profiles.
- 5.2.8. *Roles and education*
- 5.2.9. The Isle of Anglesey has a diverse range of occupations and skills. A third of the population has a university level education, with a further 18% being educated to NVQ 3 or equivalent level. This is in line with Welsh and Great Britain averages.¹⁹
- 5.2.10. Further analysis shows that Anglesey has a high prevalence of people working in high skilled trades, with 14% of the population falling into this category (included Skilled trades and Administration).
- 5.2.11. There is a lower percentage of the population working as directors, senior officials and professionals on Anglesey compared to national averages. Within this, only 20% works in professional occupations (compared to the Great Britain average of 27%).

¹⁹ NOMIS

5.2.12. The following table shows the percentage of the population within summary occupation classification groups²⁰.

(%)	Anglesey	Wales	Great Britain
Directors, Senior Officials, Professional	44.6	47.3	52.8
Administrative	6.5	9.8	9.6
Skilled Trades	14.0	9.9	8.7
Sales, Customers Service, Leisure and Service	18.7	16.9	14.4
Process and Elementary	16.2	15.9	14.5

²⁰ NOMIS

6. Workforce capacity and profile

6.1. Anglesey

- 6.1.1. The proposed regeneration activity on Anglesey including Prosperity Parc has the potential to create c19,000 jobs, a 91% increase from the current number of available jobs. The region's past experiences, such as the Wylfa Nuclear Power Station project (decommissioned 2015), have evidenced the capability of the region to develop and sustain large workforces with a proven capability to respond to the emerging needs and opportunities for growth in the local economy.
- 6.1.2. To deliver the benefits associated with the proposed developments key activities are included in the regional skills plan: the North Wales Skills and Employment Plan 2023 – 2025. This describes how the region will:
- Ensure the local labour market possesses the necessary skills to attract investment and foster job creation by reinforcing partnerships with learning organisations including Ambition North Wales, Bangor University, M-sparc, Grŵp Llandrillo Menai, and the North Wales Regional Skills Partnership, to align educational programmes with industry needs and address regional skills gaps;
 - Highlight to residents the opportunities that are available in the locale; and
 - Facilitate access to jobs for disadvantaged groups and those currently unemployed or in low-paid work.
- 6.1.3. This section explores more fully the routes to acquiring the workforce needed to ensure that the full benefits associated with Prosperity Parc can be realised.
- 6.1.4. *Inbound and outbound commuters*
- 6.1.4.1. Currently c8,400 people commute out of Anglesey for work while c3,000 people commute in for work, producing a net of c5,400 commuting out.²¹ To assess the potential for those commuting out of the territory to work on island post regeneration, we have analysed existing labour demand and labour supply on Anglesey.²²

Industry	Labour supply		Labour demand	Difference
	<i>Employed and self-employed</i>	<i>Ex self-employed</i>		
Human Health, Social Work	5,113	4,885	2,500	2,385
Public and Administration, Defence	2,900	2,864	1,000	1,864
Construction	2,805	2,181	1,000	1,181

²¹ As of 2023; StatsWales: Commuting patterns by Welsh local authority and measure

²² Data from NOMIS, ONS Business Register and Employment Survey and 2021 Census.

Note: Labour supply data includes the self-employed category, labour demand data does not. To adjust the distribution of self-employed workers by industry on the UK level was used to adjust the labour demand on Anglesey.

Industry	Labour supply		Labour demand	Difference
	<i>Employed and self-employed</i>	<i>Ex self-employed</i>	<i>Ex self-employed</i>	
Education	2,823	2,618	1,750	868
Wholesale / Retail	4,143	3,896	3,500	396
Electricity, Gas, Steam / Air Conditioning	364	334	30	304
Financial Insurance Activities	260	201	100	101
Administrative, Support Services	1,208	966	900	66
Transportation and Storage	1,242	1,041	1,000	41
Agriculture, Forestry and Fishing	977	947	947	30
Water Supply, Sewerage	425	395	400	-5
Mining and Quarrying	53	23	40	-17
Information and Communication	543	372	400	-28
Real Estate Activities	358	314	350	-36
Professional, Scientific, Technical	1,007	583	700	-117
Manufacturing	1,767	1,640	2,250	-610
Accommodation / Food Service	2,004	1,903	3,000	-1,096
Other	1,208	764	900	-136
Total	29,200	25,930	20,770	5,163

6.1.4.2. The difference between labour supply and labour demand is the net commuting workforce; results from this analysis show that the difference totals c5,200 workers. This aligns closely with the commuting data from StatsWales.

- 6.1.4.3. From this table, the top industries which see net commuting out of Anglesey are (in order):
- Human Health and Social Work Activities;
 - Public and Administration and Defence; Compulsory Social Security;
 - Construction; and
 - Education.
- 6.1.4.4. The top industries which see net commuting into Anglesey are (in order):
- Accommodation and Food Services; and
 - Manufacturing.
- 6.1.4.5. The proposed developments can offer opportunities to those who currently commute off-island to work closer to home. The most straight forward opportunities will be for those who work in the Construction sector and those who have transferrable skills from the Health, Administration and Education sectors.
- 6.1.4.6. We expect individuals in the Construction sector to take employment closer to home during the CAPEX phase of the proposed regeneration activity.
- 6.1.4.7. Those working in specialist roles in the public sector (Health and Social Care, Education, Public and Administration) may find it more challenging to transfer due to an imbalance in skills needs.
- 6.1.4.8. With specific regard to Human Health and Social Work Activities, Bangor is home to one of three major hospitals in North Wales (Ysbyty Gwynedd). Other healthcare facilities include a major hospital at Bodelwyddan, Denbighshire (Ysbyty Glan Clwyd), as well as the headquarters of the North Wales Health Board, the cancer treatment centre for North Wales, and a variety of local and community hospitals. All these healthcare facilities are within a one-hour travel time of Holyhead.
- 6.1.4.9. Of the c3,000 people that commute onto Anglesey for work, the majority are working in the Accommodation and Food and Manufacturing sectors. Such movement of labour aligns with the assessment of the occupation of the working population on Anglesey.
- 6.1.4.10. Those working in the Accommodation and Food sectors may transfer to more secure employment provided by the regeneration initiatives. There are likely to be skills gaps that would need to be addressed to allow this to happen.
- 6.1.5. *Economically inactive*
- 6.1.5.1. Given low levels of economic inactivity, there is limited expectation that anyone on the island who is economically inactive will not easily be able to move into a role and could require employability support.
- 6.1.5.2. Employability services are programs and initiatives designed to help individuals improve their skills, knowledge, and readiness for the job market. They focus on equipping individuals with the tools and capabilities needed to secure, maintain, and progress in employment.

6.2. Regional skills and labour availability

6.2.1. Another potential route to securing a workforce could lie in increasing the inflow of workers from adjoining regions. Opportunities are discussed below.

6.2.2. Gwynedd

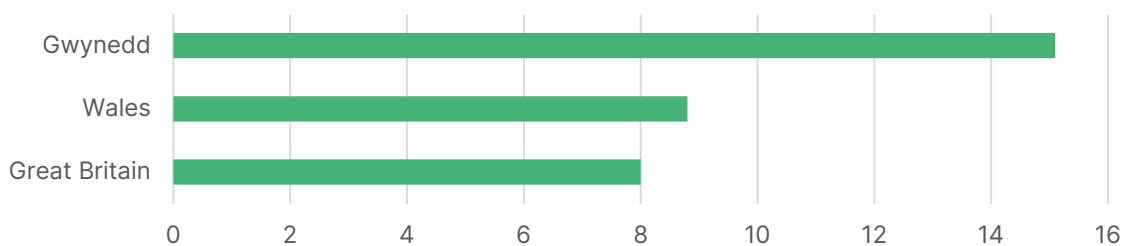
6.2.2.1. Gwynedd is connected to Anglesey via road and rail. The four largest settlements in Gwynedd (Bangor, Caernarfon, Bethesda, and Pwllheli) are all within a one-hour driving distance of Holyhead with the largest settlement, Bangor, accessible by train. The workforce in these areas could be considered a potential source of labour for the proposed development at Prosperity Parc.

6.2.2.2. Anglesey and Gwynedd have a Joint Council Development Plan that lays out a strategy to promote economic growth and address their shared challenges (e.g. the declining and aging population). However, it should be noted that both councils are now preparing separate replacement Local Development Plans.

6.2.2.3. An overview of the labour market profile for Gwynedd is as follows:²³

- 56,100 individuals are in employment (70.4% of the working age population. This is lower on Anglesey, Wales and Great Britain)
- Levels of part-time working are higher in Gwynedd (41.5% of all jobs) than at the Welsh (34.6%) and Great Britain (31.2%) levels
- Rates of unemployment (3.5%) are comparable with Wales and Great Britain
- The major employment sectors are Health and Social Care (18.9%) and Tourism (Accommodation and Food Services (15.1%) and Wholesale and Retail Trade (13.2%)).

6.2.2.4. The Accommodation and Food sectors are disproportionately important to the economy and labour market in Gwynedd. The following graph illustrates this, in terms of percentage of residents employed in this sector within each region.



6.2.2.5. This significant representation in hospitality and tourism related sectors, combined with higher than national average part-time unemployment suggests that Gwynedd may be experiencing elevated levels of under-employment. If this is the case then it is possible that there is a large population of people living in Gwynedd that could be looking for more secure, higher skilled and full-time work and may be willing to commute to Anglesey. As with the workforce on Anglesey there could be a need for re-training to ensure necessary skills are available.

²³ NOMIS

- 6.2.2.6. Drawing part-time workers away from the tourism sector in Gwynedd may have knock-on effects on this regionally important sector. If significant numbers of the current labour force in the Gwynedd tourism sector leave for more stable, full-time work on Anglesey, then there might be labour shortages in the tourism industry.
- 6.2.2.7. Drawing part-time workers away from the tourism sector in Gwynedd may have knock-on effects on this regionally important sector. If significant numbers of the current labour force in the Gwynedd tourism sector leave for more stable, full-time work on Anglesey, then there might be labour shortages in the tourism industry.
- 6.2.2.8. Another significant and disproportionately large sector is health and social care, with Ysbyty Gwynedd in Bangor being a significant employer. Skills in the Health and Social Care sector may be poorly suited for transferral to those required on Anglesey.

6.2.3. *Conwy*

6.2.3.1. Conwy sits to the west of Denbighshire and east of Gwynedd. Many of the major settlements in Conwy are within a one-hour distance of Holyhead by road and rail, opening another potential source of labour for the Anglesey. An overview of the labour market profile for Conwy shows:²⁴

- 52,200 people are in employment (76.5% of the population) which is higher than Anglesey, Welsh, and Great Britain levels;
- The major employment sectors are Health and Social Work (17.1%), Wholesale and Retail Trade (17.1%) and Accommodation and Food Services (17.1%);
- 43.9% employees are part-time, this is significantly higher than the Welsh (34.6%) and Great Britain (31.2%) levels;
- Rate of unemployment is 3.0%, which is higher than the Welsh and Great Britain rates; and
- 14,500 people are economically inactive (22.3%) which is close to the Great Britain level of 21%.

6.2.3.2. These statistics highlight the disproportionate levels of employment in the Health and Social Work, Wholesale and Retail Trade, and Accommodation and Food Services sectors. The high-level of part-time work suggests a level of underemployment.

6.2.3.3. This provides a similar assessment and conclusion to that of Gwynedd's working age population and highlights another potential labour source for Anglesey.

6.2.4. *Denbighshire*

6.2.4.1. Whilst Denbighshire does not have a direct border with Anglesey, it is accessible via road and rail with much of the region falling into the one-hour driving commute zone.

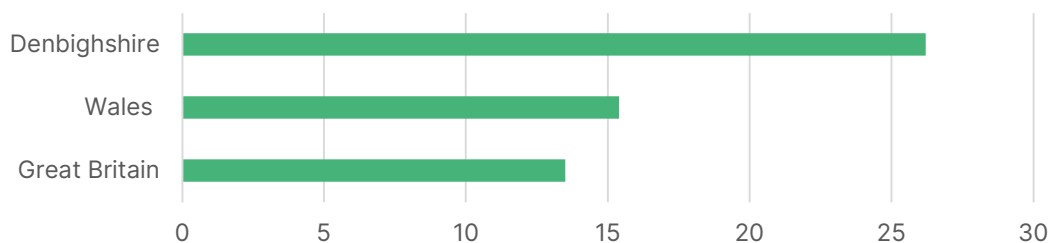
6.2.4.2. Denbighshire is one of the councils (alongside the Isle of Anglesey, Gwynedd, Conwy, Wrexham and Flintshire) that form North Wales. An overview of the labour market profile for Denbighshire is as follows:²⁵

²⁴ NOMIS

²⁵ NOMIS

- 41,100 people are in employment (71.0% of the population) which is lower than Anglesey, Welsh, and Great Britain levels;
- The major employment sectors are Health and Social Work (26.2%) and Tourism (Wholesale and Retail Trade (11.9%), Accommodation and Food Services (9.5%));
- 38.1% of employees are part-time, which is higher than Welsh (34.6%) and Great Britain (31.2%) levels;
- Rate of unemployment is 3.6%, which is comparable to Welsh and Great Britain average; and
- 14,200 people are economically inactive (25.8%) which is higher than Great Britain level of 21%.

6.2.4.3. These statistics highlight the disproportionate levels of employment in the Health and Social Work sectors. The following graph compares metrics.



6.2.4.4. Denbighshire is home to several hospitals including one of three major hospitals, Ysbyty Glan Clwyd, in North Wales, the headquarters of the Betsi Cadwaladr University Health Board, the cancer treatment centre for North Wales, and a variety of local and community hospitals. This explains the high proportion of the workforce working in the Health and Social Care sector.

6.2.4.5. Skills in the Health and Social Care sector may be poorly suited for transferral to those required on Anglesey. Despite the high proportion of employees working in the Health and Social Care sector, there is a shortage of suitably skilled healthcare staff on Anglesey as is the case neighbouring Conwy).²⁶

6.2.4.6. Economic inactivity is higher in Denbighshire than the rest of Wales or Great Britain. The majority of this economically inactive group are either long-term sick (36.7%) or looking after family (22.5%). These individuals may not be able to enter the labour market in the short-term and will not be able to enter the Anglesey workforce. The unemployment rate is 3.6%, which equates to c1,600 people.

6.3. Conclusion

6.3.1. There are routes to securing the required workforce for Prosperity Parc. The region's past experiences, such as the Wylfa Nuclear Power Station project evidence the capability of the region to develop and sustain large workforces and a proven capability to respond to the emerging needs and opportunities for growth in the local economy.

²⁶ Conwy & Denbighshire Public Services: Key employment sector – Social Care and Health

6.3.2. This analysis evidences:

- Opportunities to provide skills training for those who are economically active and want to take up the opportunities presented by Prosperity Parc;
- There are currently 8,400 individuals who commute off island for work;
- For the numbers of individuals in the travel-to-work area who work part-time and could be underemployed Prosperity Parc could provide stable, full-time employment; and
- Numbers of economically inactive individuals could be reintroduced to the jobs market through working with employability services.

6.3.3. The North Wales Regional Skills Partnership is one of four partnerships across Wales, bringing together employers, skills providers and key local stakeholders to better understand employer skills needed at a local and regional level and to deliver required training. The latest blueprint for delivery of the regional skills needs are stated in the North Wales Skills and Employment Plan 2023 – 2025.

7. Policy, legislation and strategy

7.1. Introduction

7.1.1. There are complementary aspects of the proposals with national, regional and local legislation, strategies and policies. Key areas of alignment are detailed below.

7.2. United Kingdom

7.2.1. The new UK Government has committed to delivering sustainable economic growth and infrastructure development. These plans include actions to enhance transportation networks and digital connectivity to stimulate economic activity and job creation. Invest 2035 is the UK Government's 10-year plan to deliver the conditions needed by businesses to invest in high growth sectors. The strategy aims to remove barriers to growth for the highest potential growth-driving sectors and places, aiming to provide high-quality jobs and positive tangible impacts in communities across the UK.

7.2.2. The strategy's goal is to capture a greater share of internationally mobile investment in key sectors including technology to spur domestic businesses to boost their investment and scale up their growth ambitions. The government has published a green paper that sets out its approach to a new industrial strategy (currently in consultation). The new industrial strategy is to be launched in spring 2025.

7.3. Wales

7.3.1. Well-being of Future Generations Act (Wales) 2015²⁷: This legislation aims to improve the social, economic, environmental and cultural well-being of Wales by setting into law seven goals for the national and local governments, to achieve alongside other public bodies. The goals are:

1. A prosperous Wales;
2. A resilient Wales;
3. A healthier Wales;
4. A more equal Wales;
5. A Wales of cohesive communities;
6. A Wales of vibrant culture and thriving Welsh language; and
7. A globally responsible Wales.

7.3.2. Economic resilience and reconstruction mission – Strategy²⁸: This Welsh Government strategy lays out its programme for generating economic development through investments in people and businesses. It is underpinned by the values of a wellbeing economy and a mission to reduce inequalities in Wales, and aims to create a prosperous, green and equal Wales through public investment and policy development. There is particular focus on sustainable development and creating resilience.

7.3.3. A Manufacturing Future for Wales: A Framework for Action – Strategy²⁹: Manufacturing is central to Wales' economy; the Government has laid out a plan to protect and future proof the manufacturing industry. The vision is to create a resilient manufacturing

²⁷ Well-being of Future Generations (Wales) Act 2015; Acts of the National Assembly for Wales; Royal Assent – 29th April 2015

²⁸ Economic resilience and reconstruction mission; Welsh Government; 23rd February 2021

²⁹ A Manufacturing Future for Wales: A Framework for Action; Industry Wales; 25th February 2021

industry that contributes to a healthier and more robust economy. This will be achieved through identifying opportunities around supply chains, reshoring of activities and changes to public sector procurement. The strategy prioritises manufacturing companies involved in 'value added' activities, whether through strong financial performance, undertaking strategically important projects, or making a positive social, economic, environmental, or cultural impact on their communities and the supply chain.

7.4. Regional

- 7.4.1. Anglesey and Gwynedd Joint Local Development Plan 2011-2026 - Policy³⁰: The Joint Local Development Plan is a land use development strategy for a 15-year period which concentrates on sustainable development and aims to:
- Guide the development of housing, retail, employment and other uses;
 - Include policies which will aid the Local Planning Authority's decision with regard to planning applications; and
 - Protect areas to ensure the maintenance and enrichment of the natural and built environment.
- 7.4.2. Anglesey Energy Island™ Programme – Strategy³¹: This programme lays out the local Council's vision for creating opportunities for jobs, economic growth and prosperity by capitalising on a number of transformational projects on Anglesey. This strategy works alongside a range of stakeholders in a number of sectors to put Anglesey at the forefront of low carbon energy research and development, production and servicing. It aims to maximise the benefits that the local community can reap from energy developments on Anglesey by focusing on job creation and the development of communities, infrastructure and businesses.

³⁰ Anglesey and Gwynedd Joint Local Development Plan 2011-2026; Isle of Anglesey County Council and Gwynedd Council; 31st July 2017

³¹ Anglesey Energy Island™ Programme; Isle of Anglesey County Council; Launched 2010

8. Economic Impact Assessment

8.1. Introduction

- 8.1.1. This section describes the processes and methods used to ascertain the gross and net economic impacts that the construction and operation of Prosperity Parc will bring to Anglesey (locality), Wales (national), and the UK. Impacts are measured in employment, gross value added (GVA), and income. GVA and income are measured in pounds sterling (£) at 2024FY prices. Employment is measured in full-time equivalents (FTEs), representing one full-time worker working for one full year.
- 8.1.2. The assessment considers the direct, indirect, and induced impacts:
- Direct impacts: those created by the operation of the development (such as revenue generated by commercial developments) and those created by the work done on the construction of the development;
 - Indirect impacts: those created by the business-to-business transactions that are caused by the direct impacts; and
 - Induced impacts: those created as a result of increased household income (business-to-consumer transactions) caused by the direct and indirect impacts³².
- 8.1.3. Impacts have been shown as 'one-off' and 'continuous.' These macro elements have then been broken down into two key sub-elements:
- One-off impacts: these impacts occur only once, but may be spread over a period of time, this will be generated by the CAPEX of the site; and
 - Continuous impacts: these impacts will occur continuously once the development is complete, on an annual basis and will account for the economic activity of the businesses that occupy the site.
- 8.1.4. Anglesey Land Holdings Ltd. has provided estimates of construction costs. The output generated by the activities within the site, once developed, has been calculated by Glic using the expected employment by industry grouping provided by the applicant.
- 8.1.5. A structured regional economic modelling technique has been used to calculate gross direct, indirect, and induced impacts. Net impacts at the local, regional, and national level were calculated following consideration of displacement and leakage.
- 8.1.6. Glic's regional economic modelling uses data from the UK Input-Output tables, National Accounts, and the UK Annual Business Statistics. Metrics are calculated by Standard Industrial Classification (SIC) code to the same level of granularity as the UK Annual Business Statistics. Methods for conducting the regional economic modelling include input-output analysis and cross-industry location quotients with adjustments for regional ratios, the fabrication effect, and the cross-hauling modifications.
- 8.1.7. The economic metric data used is from 2019 flexed to 2024 ratios; whilst endeavours are made to use the most up-to-date data, the latest economic data from 2020 is heavily skewed due to the COVID-19 pandemic and is not representative of the UK economy more generally.
- 8.1.8. All impacts and figures are presented in 2024 prices; HM Treasury GDP deflators are used to achieve this when required. This allows for like for like comparisons to be made.

³² Due to limited data regarding induced impacts in Wales, a conservative position has been taken in modelling.

- 8.1.9. Displacement is where an intervention takes a share of resources (market or labour) from existing organisations in a locale (area of economic interest). The scale of displacement effects varies depending on the nature of activity supported and the markets impacted by the activity. For this assessment, areas of economic interest are Anglesey, Wales, and the UK. Unless otherwise stated, displacement is assessed using HMRC guidance.
- 8.1.10. Leakage is the extent to which impacts 'leak out' of an area of economic interest into other locales. For example, an intervention aimed to increase employment in one area could see leakage and increase employment in a neighbouring locale. Leakage that occurs on the regional level is embedded into the regional economic modelling.

8.2. Methodology: Construction

- 8.2.1. To calculate the direct, indirect, and induced effects, the metrics provided in the UK Input-Output tables and Glic's regional modelling are used.
- 8.2.2. The estimated capital expenditure for Prosperity Parc in 2024 prices is £1.0Bn. This is expected to be spread over the 5-year period from 2026 until 2031. From this, metrics have been used to estimate gross direct, indirect, and induced impacts. Displacement and leakage are then considered to calculate the net direct, indirect and induced impacts.

8.2.3. *Displacement*

- 8.2.3.1. Given that the expenditure on construction could not otherwise be expected to occur, displacement is assessed to be zero on all levels.

8.2.4. *Leakage*

- 8.2.4.1. Glic's regional modelling accounts for the effects of supply chain and household spending leakage for Wales. As such, no additional leakage modifiers are required.
- 8.2.4.2. On the local (Anglesey) level, the metrics for Wales has a further leakage factor applied to represent the economic activity that will occur in Wales, but not Anglesey. Whilst economic data is limited at this level of granularity, through analysis of industry and employment data provided by NOMIS, it is assessed that Anglesey possesses a small construction sector with c1,250 employees. Given the scale of the proposed development at Prosperity Parc (and other sites), it is assumed that much of construction activities will be outsourced from outside the region. Notwithstanding opportunities to see increased local employment and training in the construction sector, it is feasible that a notable proportion of employment is sourced from outside the 1-hour travel area from the site. This is not uncommon for large-scale construction projects. Furthermore, due to the labour constraints on the Island, it is assessed that it will be unlikely that the construction sector on Anglesey will be able to expand rapidly enough to meet all of the required demand. As such, leakage is assessed to be very high on the direct, indirect, and induced level with 90% on direct impacts and 95% on indirect and induced.

8.3. Methodology: Industry operations

- 8.3.1. This development will provide space for industrial and commercial use, including:
- Up to 10,000m² of B1 office space;
 - Up to 5,000 m² of B1 research and development space; and
 - Between 223,000 m² and 238,000 m² for B8 data centre use. This will be exclusively for data centre use and no standard B8 storage and distribution uses.
- 8.3.2. The total proposed area is 238,000 m².
- 8.3.3. The outline nature of the proposals at this stage mean the number of jobs has been estimated using standard employment densities. Following consideration, the proposals are conservatively expected to generate between 1,151 and 2,073 jobs. Estimates for the distribution of jobs between expected industries are as follows:

Industry	SIC code	Employment: Low	Employment: High
B1 office space	74	833	833
B1 research and development space	25	83	125
B8 data centre	63	235	1,115
<i>Total</i>		<i>1,151</i>	<i>2,073</i>

- 8.3.4. Impacts for both employment scenarios have been assessed. SIC codes were allocated to each industry and output / FTE ratios were used to ascertain the expected output of each industry by SIC code. Once output was estimated, metrics for the direct, indirect, and induced GVA, income, and employment were used to calculate gross impacts.

8.3.5. *Displacement*

- 8.3.5.1. In this instance, displacement could occur in two ways:
- When an industry in this development displaces the market share of other businesses; and
 - When workers move from other industries at the expense of those industries.

8.3.6. *Labour displacement*

- 8.3.6.1. It has been assessed that there is a risk of shortage of new local workers for the development, at least in the relative short-term. However, workers may come from less secure and part-time employment in other sectors or commute from outside Anglesey. In the former case, it has been further assessed that any job losses in other sectors as a result of this development could be back-filled by workers commuting into Anglesey.
- 8.3.6.2. As such, labour displacement is assessed to be 0% (on Anglesey, Wales, and UK levels).

8.3.7. *Market displacement: data centres*

- 8.3.7.1. The UK is experiencing a surge in demand for data centres, driven by rapid expansion of digital services, cloud computing, and AI applications. The UK Government has

recognised this by designating data centres as Critical National Infrastructure, highlighting their importance to national security and economic stability.

- 8.3.7.2. In response to escalating demand, both domestic and international investments in UK data centres have intensified. For instance, in October 2024, US tech firms announced plans to invest over £6.3 billion in UK data centres to bolster AI innovation and economic growth, with Amazon Web Services committing to an £8 billion investment over the next five years to expand its UK data centre footprint.
- 8.3.7.3. Given this scenario, market displacement is assumed to be 0%.

8.3.8. *Market displacement: administration and research and development*

- 8.3.8.1. On the Anglesey level, the scale and structure of the local economy means that it is assessed to be unlikely that any of the sites at the development will displace the market of existing industries on Anglesey. As such, market displacement is assessed to be 0%
- 8.3.8.2. On Welsh and UK levels, as it cannot be guaranteed that activity in the office and research and development space is additional to activity ongoing in Wales and the UK, displacement is assumed to be 100%. This ensures a worst-case assessment.

8.3.9. *Leakage*

- 8.3.9.1. Since all direct jobs will be on site, direct leakage on all levels is assessed to be 0%, however it should be noted that this does not mean that the workers will necessarily be residents of Anglesey.
- 8.3.9.2. As with the construction impacts, indirect and induced leakage is built into the multipliers on the Wales level, thus only need to be considered on the Anglesey level. Given the scale and structure of the local economy on Anglesey, and because the established travel-to-work area extends beyond Anglesey, it is assessed that many of the supply chain opportunities associated with the industries on site will extend to companies located off-island.
- 8.3.9.3. As such, to ensure impacts are not overestimated, a conservative 90% leakage is applied on the indirect impacts assessed on the Anglesey level.
- 8.3.9.4. Given the potential for a proportion of direct workers coming from off-island, the induced leakage is assessed to be even higher at 95%. However, it is expected that the vast majority of the direct, indirect, and induced workers on Anglesey will reside with the local 1-hour travel area from the site, ensuring that the benefits and impacts of the additional economic activity are retained within the local area.

8.4. Impact tables

8.4.1. Construction – one off

8.4.1.1. Construction impacts are presented as a one-off impact in 2024 prices. They will be spread out over the full construction period.

(£M)	Anglesey	Wales	UK
Gross local expenditure	1,000	1,000	1,000
Net GVA	60.1	738.7	1,129.1
Net earnings	26.5	333.3	516.4
Net FTEs (#)	890	10,978	15,680

8.4.1.2. The table below presents a breakdown of the expect average annual jobs during the construction period.

(#)	Anglesey	Wales	UK
Direct	152	1,519	1,519
Indirect	42	838	1,484
Induced	4	86	486

8.4.2. Operational activity – annual and ongoing

8.4.2.1. Impacts generated by the ongoing industrial operations at the site are presented as a continuous annual impact in 2024 prices.

Employment case: Low

(£M)	Anglesey	Wales	UK
Gross local output	153.3	153.3	153.3
Net GVA	108.9	55.4	75.4
Net earnings	52.7	28.7	37.9
Net FTEs	1,219	481	677

Employment case: High

(£M)	Anglesey	Wales	UK
Gross local output	408.4	408.4	408.4
Net GVA	274.4	263.0	357.9
Net earnings	135.4	136.1	179.6
Net FTEs	2,228	2,283	3,212

9. Conclusion

- 9.1.1. The development at Prosperity Parc has the potential to provide key infrastructure needed to underpin future economic prosperity and to generate positive economic impacts on the local (Anglesey), Welsh, and UK levels.
- 9.1.2. Stakeholders recognise that efforts will be required to create the workforce needed for the planned developments, both at the site level but also as part of wider initiatives around local skills, employment and training. Plans to deliver the required workforce are described in the North Wales Skills and Employment Plan 2023 – 2025.
- 9.1.3. There is a latent pool of labour that can form the required workforce. This includes:
- 8,400 residents commuting off-island;
 - 3,000 commuting onto the island for work;
 - Those who are underemployed in the region in part time and seasonal work;
 - Those who face employability challenges;
 - Those who currently leave the region to realise employment and learning opportunities.
- 9.1.4. With a considered and structured approach to workforce development, Glic is confident that the benefits described above can be delivered.

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