1.0 Introduction

1.1 The purpose of this document is to inform the review of the Eryri Local Development Plan, and to a lesser extent, the National Park Management Plan.

2.0 Policy Context


2.1 For planning purposes the Welsh Government defines economic development as development of land and buildings for activities that generate wealth, jobs and incomes. Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as uses such as retail, tourism and public services. The construction and energy sectors are also important to the economy and are sensitive to planning policies.

2.2 The planning system should support economic and employment growth alongside social and environmental considerations within the context of sustainable development. To this end, the planning system, including planning policies, should aim to ensure that the growth of output and employment in Wales as a whole is not constrained by a shortage of land for economic uses. Local planning authorities should aim to facilitate the provision of sufficient land required by the market, except where there are good reasons to the contrary. In addition, wherever possible local planning authorities should seek to guide and control economic development to facilitate regeneration and promote social and environmental sustainability. In so doing, they should aim to:

- Co-ordinate development with infrastructure provision
- Support national, regional and local economic policies and strategies
- Align jobs and services with housing, wherever possible, so as to reduce the need for travel, especially by car
- Promote the re-use of previously developed, vacant and underused land
- Deliver physical regeneration and employment opportunities to disadvantaged communities

2.3 Development plans should:

- Reflect work with neighbouring authorities and other relevant stakeholders to plan strategically for employment land provision
- Be underpinned by an up to date and appropriate evidence base to support policy choices and land allocations for economic development
• Using this evidence base, as far as is practicable set out an economic vision for the area, including a broad assessment of anticipated employment chance by broad sector and land use
• Provide targets on land provision for the employment uses (Classes B1-B8), showing net change in Ind/floorspace for offices and industry/warehousing separately, and protect these sites from inappropriate development
• Include policies relating to future development on existing employment sites to protect them from inappropriate development
• To encourage the regeneration and re-use of sites which are still suitable and needed for employment
• To control and manage the release of unwanted employment sites to other uses
• Seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses
• Propose specific locations for those necessary industries which are detrimental to amenity and may be a source of pollution
• Seek to promote and facilitate development that will deliver physical regeneration
• In safeguarding existing sites and providing new sites, prioritise sites that deliver appropriate job and training opportunities to disadvantaged communities
• Concentrate development that attracts large numbers of people, including retail and offices, in city, town and village centres
• Including criteria-based policies to deal with development not specifically allocated in the development plan and help respond to unexpected change
• Include policies on the scope for new economic development in and adjoining rural settlements and identify suitable sites. In remote rural areas and smaller settlements a criteria based approach should be considered
• Include policies encouraging farm diversification and new rural development opportunities
• Identify protection zones around establishments that hold hazardous substances and protect the ability of existing establishments to operate or expand by preventing the incremental development of vulnerable uses in the vicinity of such sites

2.4 PPW 8th edition requires that the development plan includes a “broad assessment of anticipated employment change by broad sector and land use”

2.5 Local Development Plan land targets should aim to ensure that planning meets the demand for land so that economic growth is not constrained by a lack of land. However it is stated that demand does
not have to be met in the local planning authority in which it arises. As seen in this Background Paper there are numerous vacant units within the National Park as well as many available units and sites in the surrounding areas outside of the Park boundary. It is certainly the case that the larger strategic sites lie outside the National Park closer to strategic transport routes such as the A55 where market demand is greater. There is therefore a reliance on larger sites outside the Park boundary to meet demand from within the National Park. It would not be economically viable or environmental acceptable to develop large strategic sites within the National Park apart form the land available within the Eryri Enterprise Zone..

3.0 Welsh Government TAN 23

Employment Land Provision

3.1 LDP employment land targets should aim to ensure that planning meets the demand for land, so that economic growth is not constrained by lack of land. However, demand does not have to be met in the local planning authority area in which it arises. Much of the demand for employment land is footloose across administrative boundaries. Authorities should work together to steer development to the locations which are most sustainable and efficient (both when allocating sites for the LDP and when dealing with proposals for development). Therefore demand which cannot be met sustainably in the area where it arises should be met in neighbouring areas, and planning authorities should work together to accommodate demand which is not tied to particular areas

Existing Employment Sites

3.2 Certain industrial and related uses may conflict with other uses, especially housing. To operate effectively, these activities usually need dedicated industrial areas, where they can be confident that they will not be a bad neighbour to anyone. In managing the retention and release of existing employment sites authorities should aim to ensure that the integrity of remaining employment sites is not compromised

3.3 The traditional employment uses tend to generate lower land values than many other land uses, especially housing and retail, consequently, any land lost to these uses is generally difficult to replace. Planning authorities should avoid releasing for other uses sites where there is strong evidence of likely future need for B1-B8. In some areas, older, lower-cost employment areas may be required, especially for small and new firms who cannot afford newer and more prestigious accommodation. The loss of such areas may cause harm to local economies and should be avoided.
3.4 Existing employment sites should only be released for other uses if one or more of the following apply;

- They have poor prospects of being re-occupied for their previous use
- The particular market that the site is part of is oversupplied
- The existing employment use has unacceptable adverse impacts on amenity or the environment
- The proposed redevelopment does not compromise unduly neighbouring employment sites that are to be retained
- Other priorities, such as housing need, override more narrowly focused economic considerations
- Land of equal or better quality is made available elsewhere, even if this is not within the local planning authority boundary

3.5 Chapter 3 of TAN 23 which is titled ‘Economic Development and the Rural Economy’ contains guidance which have implications for:

- Development Policy 19 – New employment and training development
- Development Policy 20 – Agricultural Diversification
- Strategic Policy H - A sustainable rural economy

3.6 Par 3.1.2 notes that in rural areas local planning authorities should use a sequential approach when identifying land for economic uses in development plans. Less preferable locations may also be appropriate where the resulting benefits outweigh any adverse impacts of the development. In judging these benefits, authorities should have regard to the considerations set out previously in this TAN (sec 2.1.5) in terms of jobs accommodated, alternatives and special merit

3.7 There is also guidance based on any potential expansion of businesses. When businesses expand or modernise, they may need to do so in situ, it may be highly inefficient or impracticable for them to relocate to a sequentially preferred site. Similarly new businesses aiming to join existing clusters may need to be close to existing businesses if they are to derive the benefits.

3.8 Planning authorities should assess the additional benefits of development at the subject site against those of meeting demand in a sequentially preferable location

3.9 Paragraph 3.2 of TAN 23, titled ‘Re-use and Adaptation of Existing rural buildings’, (which relates to Development Policy 19) notes that local planning authorities are expected to adopt a positive approach to the conversion of rural buildings for business use providing:
• They are suitable for the specific use
• Conversion does not lead to dispersal of activity on such scale as to prejudice town and village vitality

3.10 The chapter also discusses the residential conversion of rural buildings which have ceased to be used for industrial, agricultural or commercial purposes. In areas where the creation of local employment is a priority, local planning authorities may include policies within the development plan which prohibit residential re-use unless:

• The applicant has made every reasonable attempt to secure suitable business re-use and the application is supported by a statement of the efforts which have been made; or
• Residential conversion is a subordinate part of the scheme for business re-use; or
• The resulting housing will contribute to an identified need for affordable housing for local need

3.11 However, Chapter 4.6.8, which discusses existing employment sites, notes that traditional employment uses tend to generate lower land values than many other land uses, especially housing and retail, consequently any land lost to these uses is generally difficult to replace. Planning authorities should avoid releasing for other uses sites where there is strong evidence of likely future need for B1-B8. This would tie in with the audit of existing sites mentioned previously.

4.0 Welsh Government Practice Guidance ‘Building an Economic Development Evidence Base to Support a Local Development Plan’ August 2015

4.1 Welsh Government Practice Guidance ‘Building an Economic Development Evidence Base to Support a Local Development Plan’ states the processes that a Local Authority should follow when preparing for an employment land local evidence base study. At the completion of the process a draft Economic Vision will be presented which will be incorporated into the draft Local Development Plan.

4.2 One of the first stages of the assessment includes an audit of existing employment sites, and this is advised prior to preparing an employment land local evidence base study

4.3 Things to consider during this stage include:

• Accessibility and sequential locations
• Internal environment
• External environment
• Local opportunities
• Constraints
• Viability
• Policy considerations

4.4 Following the site appraisals, assessment of marketing potential and policy contributions, recommendations can be made based on whether:

• It should be safeguarded for its current or previous employment use, perhaps subject to market testing
• It may be considered for release to other uses, depending on the overall supply-demand balance and on market conditions at the time
• It should be released for other uses

4.5 Methodology to estimate future employment demands can be done in two ways:

• Method 1 – Past building completions (this method uses the average annual completions rate for B1, B2 and B8 employment land for a previous period in order to project future requirements over the life of a LDP)
• Method 2 – Labour demand forecasting (this involves acquiring employment growth forecast data for relevant Standard Industrial Classification SIC2007 activity sectors, assigning sectors to B use classes and then converting jobs to floorspace)

4.6 Method 1 has four key steps to be followed:

• Step 1 – Sum the past completions for B1, B2 and B8 use classes
• Step 2 – Calculate the average net annual completions for each use class
• Step 3 – Project the average net annual completion over the study period
• Step 4 – Consider the use of alternative scenarios to address higher or lower growth outcomes

4.7 Method 2 has three key steps which include:

• Step 1 - Translate jobs by sector into jobs by land use (Use Class) to estimate the numbers of jobs that will be based in industrial property, warehouses and offices
• Step 2 - For each of the employment land uses, translate jobs into floorspace using employment densities (floorspace per worker)
• Step 3 – Translate floorspace into land areas using development densities (plot rations). Plot ratios can be highly variable,
especially for offices, consideration should be given to the results of both floorspace capacity and to land areas

4.8 Alternative scenarios (best and worst cases) should be created within these methods to estimate future demands

4.9 This will be followed by assessing policy options (e.g. meet the best case forecast demand in full, meet demand through different routes, meet demand using sites outside the LPA boundary) then policy recommendations, followed by monitoring processes

4.10 This will result in a draft economic vision which progresses throughout the study and will eventually be incorporated into the draft LDP. The draft vision should be underpinned by economic evidence

4.11 It is considered that neither of these two methodologies is particularly relevant to the National Park for the following reasons;

- There is limited existing industrial land and therefore past completion rates are extremely low and extrapolating future land requirements would be rather meaningless.
- The economy is so heavily based on the tourism industry and its accommodation needs and therefore not reliant on employment from more traditional B class industries.
- Industrial sites are available in larger settlements outside the Park but close to the boundary. These have better accessibility and market opportunities for development than remoter sites within the National Park.
- The former nuclear power station site at Trawsfynydd and Llanbedr Airfield have been designated at a national level by the Welsh Government, as the Snowdonia Enterprise Zone (SEZ) and these will be allocated as employment sites but specific information regarding take up is not currently available, take up will be monitored through the monitoring framework.
- The current Policy 19 adopts a flexible approach and supports the development of unallocated sites within settlements or adjacent to their boundaries without the need for specific allocations and this approach allows greater opportunities within the rural area.
- New or expanded tourist attractions are site specific and will be supported in appropriate locations within the National Park provided certain safeguards are met. New employment opportunities are likely to be created from outdoor adventure based activities taking advantage of unique site opportunities.

5.0 Valuing Wales’ National Parks – Arup study 2012
5.1 The consultants, Arup were commissioned by a partnership of the Welsh National Park Authorities, Natural Resources Wales and the Welsh Local Government Association to consider the economic value of Wales’ National Parks. The report provides an assessment of the economic benefits of the three Parks in Wales. The study measured the economic contribution to employment and Gross Value Added, but also less tangible benefits from the environment. The holistic approach adopted took into account the social, cultural and environmental value of the National Parks.

5.2 The report findings concluded the following;

- Overall the National Park economies account for £557m of Welsh GVA which is 1.2% of the national total.
- Economic activity that is concerned with the protection or management of the environment supports 10,738 jobs directly and a further 2033 outside the Park Boundaries.
- The Parks are “wellbeing factories” in that they provide access to open space, which allow a range of activities beneficial to individualis’ mental and physical health and wellbeing.

5.3 There are other ecosystem services not captured by GVA such as clean water, carbon storage and clean air – water supply contributes £6.7 m annually and carbon sequestered through peat and woodland is estimated to be between £24.4m and £97.2m.

5.4 This report is important in recognising the complimentary relationship between conservation and economic wellbeing and there is a greater economic value and enhanced well being benefits in protecting certain areas from further development. Environmental protection and economic wellbeing should not be seen as conflicting aims.

6.0 North Wales Planning Authorities North Wales Regional Employment Land Strategy 2014

6.1 The Regional Employment Land Strategy for North Wales was developed on behalf of all seven North Wales Planning Authorities (NWPA) in line with the requirements of Tan 23.. A strategy was produced in 2014 which looked at understanding the role and function of strategic employment sites across the region and planning clear investment priorities to an ensure adequate supply of strategic employment land over the strategy’s period. A strategic site was categorised as being (1) of regional importance and contributing to national economic development objectives (2) attracting a workforce from wider than the local area or (3) an airport, port or logistic sites that serve more than the local market. The sites identified were classified as being available for development in the short term 0-5 years, medium
term 5-10 years and longer term 10 years and beyond. The Snowdonia Enterprise Zone sites at Llanbedr and Trawsfynydd were identified in the study as medium term development sites. Overall, the study concluded there was sufficient availability of strategic employment sites across North Wales for the next 20 years. Their development would depend on market conditions and the progress made in individual sector growth. A number of recommendations were put forward within this strategy which included the following.

**Recommendation 1 – Flexible Planning Policy**

6.2 All North Wales Planning Authorities (NWPA) should include within the local development plans sufficiently flexible policies in order to support new strategic employment land coming forward should it be considered essential to support a programme or a potential investor with specific site requirements.

6.3 Such a need could arise on a new site which falls outside of this strategy and local land use allocations or as an extension to an existing site. In both instances, this policy should facilitate strategic level economic development opportunities

**Recommendation 2 – Site Investment Programme**

6.4 The NWPA should work together in order to develop a programme of investment in relation to the priority sites identified within the strategy. This programme of investment should include all necessary infrastructure investment and/or further feasibility work required in order to ensure sites remain viable and attractive to key sector investors.

**Recommendation 3 – Monitoring and review of take-up**

6.5 The NWPA through the Economic Development Officers should continue to develop and maintain a system of tracking investment inquiries on a single shared database. Tracking should as a minimum include the following information:

- Sector
- Inquiry size (area / floorspace)
- Dominant Use Class
- Specification
- Reason for inquiry
- If investment doesn’t emerge, reason for not locating in NW
6.6 This monitoring framework should allow for a consistent definition of employment sites across North Wales (e.g. strategic, sub-regional or local)

Recommendation 4 – Enterprise Zone Monitoring

6.7 The North Wales Planning Authorities through the Economic Development Officers should work closely with the Welsh Government Enterprise Zone team in order to monitor potential displacement of existing businesses in North Wales to the EZ in order to receive related benefits

Recommendation 5 – Sector Development / Testing

6.8 The North Wales Planning Authorities through the Economic Development Officers should work with the Sector Panels at the national level in order to promote North Wales strategic sites to potential investors and ensure that Welsh Government recognise the key sector strengths of the region and the opportunities to cluster around existing strategic investors.

6.9 The Authorities should consider some soft market testing in order to better understand the growth plans of their existing key employers as well as gauge potential market interest from other investors. This would assist in retaining exiting investors and attracting/promoting the region to future investors.

Recommendation 6 – Wylfa Newydd

6.10 The North Wales Planning Authorities should continue to work closely with Horizon in relation to site requirements and supply chain opportunities. This work should be undertaken in line with the objectives of the recently published Draft SPG for Wylfa Nuclear New Build and the Topic Papers produced in support of the Joint Local Development Plan.

Recommendation 7 – Update and review

6.11 The North Wales Planning Authorities should undertake regular review and update of this strategy in order to ensure it remains relevant to the development of strategic employment sites in North Wales and reflects changes that emerge due to priority programmes such as the Energy Island Programme.
6.12 This will also ensure that the strategy remains valid alongside emerging and updated local development plans and any future regional or sub-regional collaborative studies/work.

7.0 Gwynedd and Anglesey Employment Land Review (2012)

7.1 The purpose of this review was to enable the Councils to assess the need for and supply of employment sites. It was also conducted in order to assess the suitability of existing employment sites in terms of their ability to satisfy future employment needs.

7.2 Results from the Employment Land Review indicated that;

- Economies of both Authorities have been affected as a result of the economic recession and a number of jobs have been lost in the manufacturing sector
- Plans connected to Energy Island, Anglesey Enterprise Zone, Trawsfynydd Enterprise Zone and the Meirionnydd Employment Plan are key to future economic prosperity
- Key local economic sectors include;
  - Environmental goods and services
  - Marine technologies
  - Tourism
  - Public Sector
  - Manufacturing
  - Renewable Energy
  - Nuclear

7.3 A total of 54 sites were assessed. Following the assessment it was recommended that a total of 19 sites are part or fully disposed of (equating to a total of 35.5 hectares) for employment purposes. Employment sites in Gwynedd are sparsely located and the better quality sites are located in the Bangor area.

7.4 There was a recognised need for additional employment land in the Porthmadog/Pwllheli vicinity.

7.5 The study modelled future employment needs based on five different scenarios which include;

- Base Case - based on the information in the Study of the Labour Market (2006). However the forecasts have been amended based on data (2009 employment figures) following job cuts that have been made and those that are known for the future
- Scenario 1 - As Base Case plus the new proposed development at Wylfa
- Scenario 2 - As ‘Scenario 1’ with the additional jobs created at Bryn Cegin, Parc Cybi and the Energy Island plans
- Scenario 3 - As ‘Scenario 2’ but assuming Energy Island plans will be fully realised
- Scenario 4 - As ‘Scenario 3’ but bearing in mind the impact of a double dip recession

7.6 The table below shows the potential land need, by type of employment need, based on these suggested scenarios.

<table>
<thead>
<tr>
<th>The need for additional land up to 2025 (ha)</th>
<th>Current</th>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
<th>Scenario 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Offices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anglesey</td>
<td>0.3</td>
<td>0.8</td>
<td>1.3</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>Gwynedd</td>
<td>1.8</td>
<td>1.8</td>
<td>4.8</td>
<td>7.1</td>
<td>7.1</td>
</tr>
<tr>
<td><strong>Manufacturing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anglesey</td>
<td>-50.3</td>
<td>-25.1</td>
<td>-17.3</td>
<td>-17.3</td>
<td>9.5</td>
</tr>
<tr>
<td>Gwynedd</td>
<td>-18.6</td>
<td>-18.6</td>
<td>-12.1</td>
<td>-12.1</td>
<td>7.5</td>
</tr>
<tr>
<td><strong>Storage</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anglesey</td>
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<td>0.0</td>
<td>0.0</td>
<td>0.1</td>
<td>0.0</td>
</tr>
<tr>
<td>Gwynedd</td>
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<td>5.0</td>
<td>7.6</td>
<td>6.3</td>
<td>1.2</td>
</tr>
<tr>
<td><strong>Total Employment Land</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anglesey</td>
<td>-50.1</td>
<td>-24.3</td>
<td>-16.0</td>
<td>-16.4</td>
<td>10.3</td>
</tr>
<tr>
<td>Gwynedd</td>
<td>-11.8</td>
<td>-11.8</td>
<td>0.2</td>
<td>1.2</td>
<td>15.8</td>
</tr>
</tbody>
</table>

7.7 Some conclusions from the review included;

- Collaboration between both Authorities in terms of planning and economic development to ensure that it is an attractive area for inward investment is essential
- The re-use of land and existing empty properties for employment uses is essential
- Consider the disposal of sites for other uses, in particular as a result of the current overprovision of employment land
- Need to look for 2 or 3 suitable employment sites (1 to 5 hectares) in the Pwllheli/Porthmadog vicinity. It is noted that these lands should ideally be in a suitable location, have suitable access and be near an existing settlement

8.0 The Meirionnydd Employment Plan (Gwynedd Council - November 2010)

8.1 The aim of this report was to close the opportunity gap by drawing appropriately on the strengths and resources of Meirionnydd to ensure an innovative, vibrant and sustainable economy with a variety of high quality work opportunities. The report discusses prominent economical issues within Meirionnydd at the time of study.

8.2 The potential workforce
• Although statistically less than the figures for Wales, the percentages of those unemployed in some areas across the county is comparable to or higher than the level for Wales
• It takes more time for some of the unemployed in Meirionnydd to get jobs compared with the rest of Gwynedd (in terms of the whole county and its areas) and Wales, and especially in the most rural areas of Meirionnydd
• The areas that demonstrate the need for a major focus on employment for jobseekers: Ffestiniog - Trawsfynydd and Arudwy, and for different reasons Dolgellau and the wards of Bala, Tywyn and Llangelynin

8.3 Jobs and employment structure

• There are fewer jobs in Meirionnydd than in other areas of Gwynedd
• There is a mismatch between the jobs available and the number of jobseekers - there is also a mismatch between the jobs available and the types of jobs that the majority of jobseekers want
• A slightly higher percentage of jobs in Meirionnydd are full time jobs, and that, together with household income figures, suggest that low wages are a characteristic of the economy of Meirionnydd
• The economy has a narrow base with 32.3% of Meirionnydd employees working in the public sector, and a further 32.2% divided between the tourism sector (accommodation and catering) and the sales sector (wholesale and retail)

8.4 The prosperity of the area

• Meirionnydd has the lowest household income in Gwynedd
• More than 10% of Meirionnydd households earn less than £10k per annum
• Almost a quarter of Meirionnydd households have an income of less than £15k per annum, and more than half have an income of less than £25k per annum
• The median income of any ward in Meirionnydd is not sufficient to meet house prices in those wards. That is a sign of poverty on a large geographical scale, and not only in pockets or specific locations

8.5 Key objectives and initiatives suggested in order to tackle some of these issues were suggested in the report and these are listed below.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Potential schemes and proposals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective 1 - To vary and increase the number of jobs available in Meirionnydd, and</td>
<td>Growth in the outdoor sector</td>
</tr>
<tr>
<td></td>
<td>Growth in the historical heritage sector</td>
</tr>
<tr>
<td></td>
<td>Public sector jobs</td>
</tr>
<tr>
<td>Objective 2 - To ensure that the current economy of Meirionnydd works to its full potential by maximising the ability of products and businesses in the area to compete commercially in the marketplace</td>
<td>Competitive Platform - Information Technology Infrastructure Transport links Marketing Blaenau Ffestiniog physical regeneration plan Sector Clusters Major capital opportunities</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>Objective 3 - To capitalise on the innovation of research organisations wherever they exist to establish the sectors of the future, relevant to the circumstances of Meirionnydd, with an emphasis on high quality work opportunities</td>
<td>Innovation and the Science sector Marine sector The Green sector The Energy sector Bio-tourism</td>
</tr>
<tr>
<td>Objective 4 - To develop different types of sites across the area, together with the employment infrastructure, focusing on reclaiming brownfield sites and redundant buildings for economic use</td>
<td>The Trawsfynydd site Llanbedr Airfield site Strategic employment sites Redundant buildings Living and working locally</td>
</tr>
<tr>
<td>Objective 5 - To act on Dolgellau’s strategic designation within the Wales Spatial Plan and further develop its role as Meirionnydd’s main employment and service centre</td>
<td>Public services The town centre Access to employment and services The Dolgellau occupational skills hub Youth enterprise</td>
</tr>
<tr>
<td>Objective 6 - To maximise the value of national and regional economic and skills programme, ensuring that interventions are diverted to Meirionnydd</td>
<td>Attract and divert resources Strategic Investment Fund Strategic Capital Investment Fund Grants for businesses Shaping the Future Rural Development Fund Heritage tourism project Communities first</td>
</tr>
</tbody>
</table>
9.0 **Snowdonia Enterprise Zone**

9.1 The Authority has received two candidate sites to be considered as employment allocations in the revised Eryri LDP. The former nuclear power station site at Trawsfynydd and Llanbedr Airfield have been designated at a national level by the Welsh Government, as the Snowdonia Enterprise Zone (SEZ). A detailed site appraisal of both sites has been included in appendix 2.

9.2 The Snowdonia Enterprise Zone which includes the former nuclear power station site at Trawsfynydd and the former airfield site at Llanbedr has the potential to create new quality job opportunities. The aim for the Trawsfynydd site is to become a hub for innovative low carbon technology enterprises and associated Research & Development and for ICT/Digital Enterprises.

9.3 Llanbedr airfield, near Harlech, was built in 1938 and was in use during the Second World War. It was later used by the Royal Aircraft Establishment as a base for the development of unmanned drones used for towing targets for gunnery and missile ranges elsewhere along the Welsh coast. It closed in 2004 but the Authority has recognised existing use rights of the site for the flying of unmanned aerial vehicles only and not as an airport for the flying of general aircraft.

9.4 The long term strategic vision for Llanbedr is linked to the Unmanned Air Systems (UAS) sector, with potential for local businesses expanding or companies moving into Wales from the international UAS and broader sectors. It is hoped that the site will also allow for the development of key engineering skills based on the aerospace industry. It was announced in 2014 that Llanbedr Airfield had been shortlisted as one of eight sites in the UK as a potential space port. The shortlist has since been amended to six possible sites. The impact of possibly developing the site for a Spaceport is unknown at this stage. If the Llanbedr site is chosen as the preferred site further information will be required on its socio-economic impacts and its land use consequences. If these are substantial and the development is very likely to proceed it may trigger a need to make further revisions to the ELDP.
9.5 The designation of the Snowdonia Enterprise Zone on sites in Trawsfynydd and Llanbedr has the potential to create new sustainable employment opportunities. As the sites are not currently allocated in the Eryri LDP they will need to be shown as allocations in a Plan revision. The Authority has worked in close co-operation with the Enterprise Board and the Welsh Government in identifying the development opportunities for the Snowdonia Enterprise Zone. A development Masterplan has been produced for Llanbedr Airfield which identifies new development areas. The current operators of the site foresee the potential for further development of testing unmanned aerial vehicle systems and invested in the facilities at the site to cater for this expansion. This will allow modest employment growth at the site but many of the technical jobs required for testing will be temporary in nature and restricted to testing periods. There is some potential for complimentary employment growth based on the aerospace industry but this would require substantial investment in competition with other similar sites in the UK. It is not thought that the potential scale of employment opportunities that could arise will de-rail the existing Plan’s strategy or lead to an increase in housing demand. As is the case with the Trawsfynydd site the jobs created will re-instate those gradually lost from the previous activities on the site.

9.6 The nuclear reactor at the Trawsfynydd site is being decommissioned and the work should be completed in 2020. At the present time around 400 workers are involved in this process and this number will gradually decline up to 2020. It is thought unlikely that the number of new jobs created on the site will replace the current 400. Although the Trawsfynydd site has some unique characteristics, its marginal location away from the main markets and the unavailability of a large labour pool makes attracting new industries very difficult. Competition from other Enterprise Zone sites in Wales is also an issue.

9.7 Any new developments within the Enterprise Zone should take advantage of the unique selling point of being located within the attractive setting of the National Park. New projects should be innovative and provide complimentary design solutions suitable for a National Park setting. There is a chance to create new skilled employment opportunities for young people in the area.
10.0 SNPA Assessment of Employment Land –2014

10.1 During 2014 the NPA undertook an assessment of the availability of industrial units and development sites both in the National Park and close to its boundaries. The results are set out in this report. It found that there were a number of vacant units of varying sizes available within the Park and in nearby towns such as Bangor, Caernarfon, Penygroes, Porthmadog and Llandudno Junction.

Dolgellau - Current Situation

10.2 The map below indicates the existing employment land in Dolgellau.

<table>
<thead>
<tr>
<th>Unit</th>
<th>Unit type</th>
<th>Size (sq.ft)</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Industrial space with trade counter</td>
<td>9,422</td>
<td>Let</td>
</tr>
<tr>
<td>02</td>
<td>Industrial space</td>
<td>23,382</td>
<td>Let</td>
</tr>
<tr>
<td>03</td>
<td>Industrial space</td>
<td>750</td>
<td>To let</td>
</tr>
<tr>
<td>04</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
<tr>
<td>05</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
<tr>
<td>06</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
</tbody>
</table>
10.3 The existing employment site in Dolgellau has been fully developed. Units 01 – 06: 09 – 12; 19, 20 and 24 – 27 are owned by Dunedin Industrial. Since 2009 the units have changed ownership between Spencer Holdings and Hansteens before being taken over by Dunedin Industrial. Unit (03 is available to lease:

10.4 Below is a comparison of unit occupation during 2009 and 2015 surveys:

<table>
<thead>
<tr>
<th>Year of Study</th>
<th>To Let / Let</th>
<th>No of units</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>Total To Let</td>
<td>1</td>
<td>750 sq ft</td>
</tr>
<tr>
<td></td>
<td>Total Let</td>
<td>15</td>
<td>53,196 sq ft</td>
</tr>
<tr>
<td>2009</td>
<td>Total To Let</td>
<td>2</td>
<td>10,941 sq ft</td>
</tr>
<tr>
<td></td>
<td>Total Let</td>
<td>14</td>
<td>43,005 sq ft</td>
</tr>
</tbody>
</table>

10.5 In 2015 there is one more unit being let than there was in 2009 and there is also only 750 sq feet of floorspace available to let at the time of the 2015 survey. This suggests an improvement in the site occupation between studies.

10.6 There are also units not owned by Dunedin Industrial on the site. Owners include Idris Contract Flooring, Bargain Books, Sign Creation and R.A. Chilton. Although there are many constraints to providing further employment land allocations (flood risk; topography etc.) in Dolgellau, opportunities for utilising brownfield land, redundant sites and buildings should be investigated further as part of the LDP revision.

**Total Floorspace Available 750 sq.ft.**
11.0 Bala - Current Situation

11.1 The map below indicates the existing employment land in Bala.

11.2 Units 1 - 4, 8 -12, 15 and 16 are owned by Hansteen. Three units, which are 01, 02 and 03 are currently vacant and available to lease:

<table>
<thead>
<tr>
<th>Unit</th>
<th>Unit type</th>
<th>Size (sq.ft)</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Industrial space</td>
<td>1,500</td>
<td>To Let</td>
</tr>
<tr>
<td>02</td>
<td>Industrial space</td>
<td>1,500</td>
<td>To Let</td>
</tr>
<tr>
<td>03</td>
<td>Industrial space with office and trade counter</td>
<td>1,500</td>
<td>To Let</td>
</tr>
<tr>
<td>04</td>
<td>Industrial space</td>
<td>1,500</td>
<td>Let</td>
</tr>
<tr>
<td>08</td>
<td>Industrial space</td>
<td>1,500</td>
<td>Let</td>
</tr>
<tr>
<td>09</td>
<td>Industrial space</td>
<td>3,000</td>
<td>Let</td>
</tr>
<tr>
<td>10</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
<tr>
<td>11</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
<tr>
<td>12</td>
<td>Industrial space</td>
<td>750</td>
<td>Let</td>
</tr>
<tr>
<td>15</td>
<td>Industrial space</td>
<td>4,210</td>
<td>Let</td>
</tr>
<tr>
<td>16</td>
<td>Industrial space with office and trade counter</td>
<td>2,850</td>
<td>Let</td>
</tr>
</tbody>
</table>
11.3 Below is a comparison of unit occupation during 2009 and 2015 surveys:

<table>
<thead>
<tr>
<th>Year of Study</th>
<th>To Let / Let</th>
<th>No of units</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>Total To Let</td>
<td>5</td>
<td>13,060 sq ft</td>
</tr>
<tr>
<td></td>
<td>Total Let</td>
<td>6</td>
<td>6,750 sq ft</td>
</tr>
<tr>
<td>2009</td>
<td>Total To Let</td>
<td>2</td>
<td>4,350 sq ft</td>
</tr>
<tr>
<td></td>
<td>Total Let</td>
<td>9</td>
<td>15,460 sq ft</td>
</tr>
</tbody>
</table>

11.4 In 2015 there were three units less being let than there were in 2009 and there is also only 13,060 sq feet of floorspace available to let at the time of the 2015 survey. This shows that the Bala Industrial Estate has experienced a decrease in site occupation between the two studies.

11.5 There are also units not owned by Dunedin Industrial on the site. Owners include Berwyn Bakeries, Aykroyds, Bala Confectionaries, Gwynedd Council, Minafon Garage, Royal Mail, Ifor Williams Trailers and Saracens Tyres

11.6 The unit previously used as Systema Scaffolding within the allocated area was recently granted planning permission to be converted to a new Co-Op convenience store.

11.7 It is recognised that Bala Enterprise Park, notwithstanding issues of flood risk, is the only realistic opportunity to generate more employment land and premises in Bala. The Welsh Government has previously undertaken Flood Consequences Assessments as part of their proposals to further develop land at Bala Enterprise Park. However Natural Resource Wales continues to have ongoing concerns about the integrity of the flood defences. Although the Welsh Government has indicated that it would support the completion of the remaining employment land at Bala Enterprise Park it does recognise the concerns regarding the site and accepts that there are flood risk reasons for not allocating the remaining land in the Eryri LDP. Opportunities for utilising brownfield land, redundant sites and buildings should be investigated further as part of the LDP revision.
12.0 Harlech

12.1 The existing employment units in Harlech. The units in Harlech come in two sizes. Units 1-4; 7–10 and 13 –16 measure 70 square metres (753 sq feet). Units 5, 6, 11 and 12 are 104 square metres (1,119 sq feet).

12.2 Gwynedd Council has noted that all units are currently occupied.

12.3 Dunedin Industrial also own industrial estates and enterprises parks in towns within close proximities to the National Park. The table below highlights these towns and how many units are available in each site.

<table>
<thead>
<tr>
<th>Town/Site name</th>
<th>Unit</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Machynlleth</td>
<td>All units currently occupied</td>
<td></td>
</tr>
<tr>
<td>Penrhyndeudraeth</td>
<td>Unit 12</td>
<td>1,669 sq ft (155.1 sq m)</td>
</tr>
<tr>
<td>Tywyn</td>
<td>Unit 5-6</td>
<td>6,785 sq ft (630 sq m)</td>
</tr>
<tr>
<td>Tywyn</td>
<td>Unit 11 &amp; 12</td>
<td>6000 sq ft (557 sq m)</td>
</tr>
<tr>
<td>Tywyn</td>
<td>Unit 14</td>
<td>1500 sq ft (139 sq m)</td>
</tr>
<tr>
<td>Tywyn</td>
<td>Unit 17A</td>
<td>1500 sq ft (139 sq m)</td>
</tr>
<tr>
<td>Tywyn</td>
<td>Unit 17B</td>
<td>1500 sq ft (139 sq m)</td>
</tr>
</tbody>
</table>

12.4 Analysis of the Welsh Government’s Commercial Property Database (August 2014) reveals that there is a plentiful supply of land and industrial buildings, at numerous sites, available within the designated Zones of influence areas surrounding the National Park boundary.
13.0 Land Availability

13.1 Analysis of the Welsh Government’s Commercial Property Database (August 2014) reveals that there is a plentiful supply of land and industrial buildings, at numerous sites, available within the designated Zones of influence areas surrounding the National Park boundary.

1. Caernarfon
2. Bangor
3. Llandudno & Conwy
4. Blaenau Ffestiniog & Porthmadog
5. Dyffryn Conwy
6. Dolgellau & Arudwy
7. Bala
8. Machynlleth & Aberdyfi
13.2 The list below shows the available units within these zones of influence (please note that Mochdre Industrial Estate has been included due to its close proximity to the Llandudno/Conwy zone of influence).

<table>
<thead>
<tr>
<th>Town</th>
<th>Site</th>
<th>Unit num</th>
<th>Available</th>
<th>Tenure Details</th>
<th>Total Size</th>
<th>Site distance from Park boundary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bala</td>
<td>Bala Industrial Estate</td>
<td>Unit 6</td>
<td>Yes</td>
<td>Freehold may be available, Leasehold on application</td>
<td>961.79 sq m</td>
<td>Within the NP</td>
</tr>
<tr>
<td>Bala</td>
<td>Bala Industrial Estate</td>
<td>Unit 5</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>464.5 sq m</td>
<td>Within the NP</td>
</tr>
<tr>
<td>Bangor</td>
<td>Llandygai Industrial Estate</td>
<td>Unit 11, Plot 27</td>
<td>Yes</td>
<td>£8000 leasehold per annum</td>
<td>133.59 sq m</td>
<td>3.6km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Llandygai Industrial Estate</td>
<td>Unit 28 and 29</td>
<td>Yes</td>
<td>£29100 leasehold per annum</td>
<td>678.73 sq m</td>
<td>3.6km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Llandygai Industrial Estate</td>
<td>Unit 13, Zone 2</td>
<td>Yes</td>
<td>£1350000 on freehold</td>
<td>3591.51 sq m</td>
<td>3.6km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Llys y Dderwen</td>
<td>Unit D1</td>
<td>Yes</td>
<td>£11300 leasehold per annum</td>
<td>105.07 sq m</td>
<td>8.5km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Llys y Dderwen</td>
<td>Unit F1</td>
<td>Yes</td>
<td>Leasehold £8.50 per sq ft</td>
<td>194.35 sq m</td>
<td>8.5km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Gateway Park</td>
<td>Unit 1</td>
<td>Yes</td>
<td>Leasehold £2.5 per sq ft</td>
<td>5574 sq m</td>
<td>3.6km</td>
</tr>
<tr>
<td>Bangor</td>
<td>Gateway Park</td>
<td>Phase 2</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>121.23 sq m</td>
<td>3.6km</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial Estate</td>
<td>Unit 22</td>
<td>Yes</td>
<td>£4850 leasehold per annum</td>
<td>98.94 sq m</td>
<td>6.2km</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial Estate</td>
<td>Unit 8</td>
<td>Yes</td>
<td>£7500 leasehold per annum</td>
<td>137.21 sq m</td>
<td>6.2km</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial Estate</td>
<td>Unit 13</td>
<td>Yes</td>
<td>£7500 leasehold per annum</td>
<td>137.21 sq m</td>
<td>6.2km</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial Estate</td>
<td>Unit 6</td>
<td>Yes</td>
<td>£7500 leasehold per annum</td>
<td>137.21 sq m</td>
<td>6.2km</td>
</tr>
<tr>
<td>Estate</td>
<td>Location</td>
<td>Unit Number</td>
<td>Available</td>
<td>Leasehold</td>
<td>Size (sq m)</td>
<td>Distance (km)</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------</td>
<td>-------------</td>
<td>-----------</td>
<td>--------------------</td>
<td>-------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial</td>
<td>Unit 14</td>
<td>Yes</td>
<td>£7500 leasehold per annum</td>
<td>137.21</td>
<td>6.2</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial</td>
<td>Unit 15</td>
<td>Yes</td>
<td>£7500 leasehold per annum</td>
<td>137.21</td>
<td>6.2</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial</td>
<td>Unit 27</td>
<td>Yes</td>
<td>£10750 leasehold</td>
<td>283.53</td>
<td>6.2</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial</td>
<td>Unit 10</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>594.56</td>
<td>6.2</td>
</tr>
<tr>
<td>Caernarfon</td>
<td>Cibyn Industrial</td>
<td>Unit 11</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>789.65</td>
<td>6.2</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 1C</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>3196.04</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 6</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1848.34</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 5</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1848.34</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 4</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1848.34</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 3</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1848.34</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 8</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1581.44</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Commerce Park</td>
<td>Unit 7</td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>1581.44</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Business</td>
<td>Showroom,</td>
<td>Yes</td>
<td>£17000 leasehold</td>
<td>434.86</td>
<td>4.4</td>
</tr>
<tr>
<td></td>
<td>Park</td>
<td>Williams House</td>
<td></td>
<td>£4500 leasehold per annum</td>
<td>97.45</td>
<td>4.4</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Parc Caer Seion</td>
<td>Unit 3</td>
<td>Yes</td>
<td>£15000 leasehold</td>
<td>297.28</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Parc Caer Seion</td>
<td>Workshop and compound</td>
<td>Yes</td>
<td>£25000 leasehold</td>
<td>331.37</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Location</td>
<td>Address</td>
<td>Unit/Plot</td>
<td>Availability</td>
<td>Leasehold Details</td>
<td>Size</td>
<td>Distance</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------</td>
<td>-------------</td>
<td>--------------</td>
<td>------------------------------------------</td>
<td>----------</td>
<td>----------</td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Parc Caer Seion, Unit 4</td>
<td>Yes</td>
<td>£23000 per annum</td>
<td>449.17 sq m</td>
<td>&lt;1km</td>
<td></td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Parc Caer Seion, Unit 9</td>
<td>Under offer</td>
<td>£89600 leasehold</td>
<td>875.58 sq m</td>
<td>&lt;1km</td>
<td></td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>240 Conway old road, Mochdre</td>
<td>Yes</td>
<td>£40000 leasehold</td>
<td>779.06 sq m</td>
<td>4.4km</td>
<td></td>
</tr>
<tr>
<td>Colwyn Bay</td>
<td>Mochdre Business Park</td>
<td>Main Factory, Williams House</td>
<td>Yes</td>
<td>£50000 leasehold</td>
<td>1539.54 sq m</td>
<td>4.4km</td>
</tr>
<tr>
<td>Llandudno</td>
<td>Builder st West, Workshop Premises</td>
<td>Yes</td>
<td>Leashold offers invited</td>
<td>1128.92 sq m</td>
<td>4km</td>
<td></td>
</tr>
<tr>
<td>Llandudno</td>
<td>Council Street West</td>
<td>Trade Counter/Workshop</td>
<td>Under Offer</td>
<td>Leashold offers invited</td>
<td>327.94 sq m</td>
<td>4.1 km</td>
</tr>
<tr>
<td>Llandudno</td>
<td>Cae Bach, Builder Street</td>
<td>Unit 4</td>
<td>£12000 leasehold</td>
<td>236.19 sq m</td>
<td>4km</td>
<td></td>
</tr>
<tr>
<td>Llandudno</td>
<td>Builder St</td>
<td>71B</td>
<td>Freehold £169500 or £9620 leasehold</td>
<td>165.36 sq m</td>
<td>4km</td>
<td></td>
</tr>
<tr>
<td>Llandudno Jct</td>
<td>Ferry Farm Road, The Roundhouse Yard</td>
<td>Under Offer</td>
<td>Leashold £7500 per annum</td>
<td>106.18 ha</td>
<td>1.5km</td>
<td></td>
</tr>
<tr>
<td>Llandudno Jct</td>
<td>Tremarl Industrial Estate Units 102 to 105</td>
<td>Yes</td>
<td>Leasehold £55900 per annum</td>
<td>798.94 sq m</td>
<td>2.6km</td>
<td></td>
</tr>
<tr>
<td>Penmaenma wr</td>
<td>Constitution Hill, Penmaenmawr</td>
<td>Bryn Derwen Garage</td>
<td>Yes</td>
<td>Freehold £150000</td>
<td>310.1 sq m</td>
<td>&lt;1km</td>
</tr>
<tr>
<td>Penygroes</td>
<td>Penygroes Industrial Estate Plot 6a</td>
<td>Yes</td>
<td>£25000 freehold</td>
<td>0.16 ha</td>
<td>3.1km</td>
<td></td>
</tr>
<tr>
<td>Penygroes</td>
<td>Penygroes Industrial Estate Plot 6</td>
<td>Yes</td>
<td>£45000 freehold</td>
<td>0.25 ha</td>
<td>3.1km</td>
<td></td>
</tr>
<tr>
<td>Penygroes</td>
<td>Penygroes Industrial Estate Plot 7</td>
<td>Yes</td>
<td>£55000 freehold</td>
<td>0.31 ha</td>
<td>3.1km</td>
<td></td>
</tr>
<tr>
<td>Penygroes</td>
<td>Penygroes Industrial Estate Plot 8</td>
<td>Yes</td>
<td>£65000 freehold</td>
<td>0.45 ha</td>
<td>3.1km</td>
<td></td>
</tr>
<tr>
<td>Penygroes</td>
<td>Penygroes Industrial Estate Plot 9</td>
<td>Yes</td>
<td>£130000 freehold</td>
<td>0.99 ha</td>
<td>3.1km</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Development Land, Penamser rd, Porthmadog</td>
<td>Type</td>
<td>Leases/Prices</td>
<td>Available Floor Space</td>
<td>Distance</td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------</td>
<td>------</td>
<td>------------------------</td>
<td>-----------------------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>Porthmadog</td>
<td></td>
<td>Yes</td>
<td>Leasehold on application</td>
<td>0.84 ha</td>
<td>1.1km</td>
<td></td>
</tr>
<tr>
<td>Porthmadog</td>
<td>Penamser rd, Porthmadog</td>
<td>Unit 22</td>
<td>Freehold £120000 and £12000 leasehold</td>
<td>234.02 sq m</td>
<td>1.1km</td>
<td></td>
</tr>
<tr>
<td>Porthmadog</td>
<td>Porthmadog Business Park</td>
<td>Units A1 to A4</td>
<td>Leasehold £4 per sq ft</td>
<td>372.81 sq m</td>
<td>1km</td>
<td></td>
</tr>
</tbody>
</table>

TOTAL AVAILABLE FLOORSPACE WITHIN ZONES OF INFLUENCE - **2,102,611 sq m**
13.3 The ‘North Wales Regional Employment Land Strategy’ (2014) by the North Wales Planning Authorities notes some of the available land within Industrial and Business Parks that are either within or near to the National Park Boundary. These include the following:

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Gross Area (ha)</th>
<th>Available (ha)*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parc Menai</td>
<td>24.7</td>
<td>6.3</td>
</tr>
<tr>
<td>Parc Bryn Cegin</td>
<td>35.9</td>
<td>35.9</td>
</tr>
<tr>
<td>Cibyn Industrial Estate</td>
<td>37.6</td>
<td>7.31</td>
</tr>
<tr>
<td>Mochdre Commerce Park</td>
<td>10.3</td>
<td>5</td>
</tr>
<tr>
<td>Llanbedr Enterprise Zone</td>
<td>228</td>
<td>31.4</td>
</tr>
<tr>
<td>Trawsfynydd Enterprise Zone</td>
<td>150.4</td>
<td>50</td>
</tr>
<tr>
<td>TOTAL</td>
<td>486.9 ha</td>
<td>135.91 ha</td>
</tr>
</tbody>
</table>

*this figure represents the latest available developable area figure. It is recognised that land availability changes constantly and therefore provides an approximate only. (2014 data)

13.4 These were sites defined as strategic sites at a local level. Llanbedr and Trawsfynydd Enterprise zones are within the National Park boundary.

13.5 Parc Menai, Parc Bryn Cegin, Cibyn Industrial Estate and Mochdre Commerce Park are either within the zones of influences relevant to Snowdonia National Park, or within close proximity to their boundaries (as seen with Mochdre Commerce Park)

14.0 Gwynedd Council Industrial and Business Estates data

14.1 Information provided by Gwynedd Council, based on a 2011 study shows the available land within the business and industrial estates located within both Gwynedd and Anglesey. For the purposes of this background paper the sites located within the zones of influences relevant to Snowdonia National Park have been chosen. The information is displayed below:

<table>
<thead>
<tr>
<th>Site</th>
<th>Total land area (ha)</th>
<th>Total undeveloped land (ha)</th>
<th>Use class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parc Bryn Cegin</td>
<td>36</td>
<td>36</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Llandygai Industrial Estate</td>
<td>27.6</td>
<td>4</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Parc Britannia, Bangor</td>
<td>7.9</td>
<td>0</td>
<td>B1</td>
</tr>
<tr>
<td>Location</td>
<td>Available Land (ha)</td>
<td>Zoned Land (ha)</td>
<td>Zoned Zone(s)</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------</td>
<td>----------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Parc Menai, Bangor</td>
<td>32.9</td>
<td>13.2</td>
<td>B1</td>
</tr>
<tr>
<td>Cibyn Industrial Estate, Caernarfon</td>
<td>37.7</td>
<td>7.3</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Penrhyn Deudraeth Business Park</td>
<td>11.5</td>
<td>3.1</td>
<td>B1</td>
</tr>
<tr>
<td>Porthmadog Business Park</td>
<td>11.5</td>
<td>4</td>
<td>B1, B2</td>
</tr>
<tr>
<td>Stad Pendre, Tywyn</td>
<td>7.9</td>
<td>2.7</td>
<td>B1, B2</td>
</tr>
<tr>
<td>Bae Hirael, Bangor</td>
<td>9.1</td>
<td>6.72</td>
<td>B1</td>
</tr>
<tr>
<td>Peblig, Caernarfon</td>
<td>6.7</td>
<td>2.2</td>
<td>B2</td>
</tr>
<tr>
<td>Former Friction Dynamex, Caernarfon</td>
<td>14.6</td>
<td>3</td>
<td>B2, B8</td>
</tr>
<tr>
<td>Tanygrisiau, Blaenau Ffestiniog</td>
<td>7.4</td>
<td>2.7</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Felin Fawr, Bethesda</td>
<td>1.5</td>
<td>0.4</td>
<td>B2</td>
</tr>
<tr>
<td>Glyn Rhonwy, LLanberis</td>
<td>29.8</td>
<td>3.3</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Penygroes Industrial Estate</td>
<td>10</td>
<td>4.3</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td>Former hospital site, Bron y Garth, Penrhyn Deudraeth</td>
<td>1.6</td>
<td>0.7</td>
<td>B1</td>
</tr>
<tr>
<td>Griffin Industrial estate, Penrhyn Deudraeth</td>
<td>4.9</td>
<td>0.9</td>
<td>B1, B2, B8</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>258.6 ha</strong></td>
<td><strong>94.52 ha</strong></td>
<td></td>
</tr>
</tbody>
</table>

14.2 Because of this availability within the zones of influence, it is considered that there is no need for large serviced employment sites and industrial estates within Snowdonia and therefore the Authority does not foresee a need to make specific land allocations for large industrial estates in the LDP revision.

14.3 The economic vision set out by the LDP’s policies is to provide opportunities for economic development across the National Park. Policies H and 19: (A Sustainable Rural Economy and New employment and training development) in the Eryri LDP does not allocate new employment sites in Bala and Dolgellau however these existing sites should be safeguarded. Rather it sets out criteria to facilitate the development of small local enterprises in the National Park, either through the re-use and/or expansion of existing buildings, or new development on smaller, unallocated sites within, or adjacent to towns and villages in line with recent changes to PPW and TAN 23.
14.4 Since the adoption of the Local Development Plan in 2011 there have not been many examples of planning applications related to employment opportunities. However new employment opportunities have been created through agricultural diversification schemes, converting existing rural buildings to short term holiday accommodation or other tourism related projects, creating direct or indirect jobs. The Authority has also supported new proposals on the edge of the National Park such as Surf Snowdonia in Dolgarrog, which will bring new employment opportunities to the area.

14.5 Due to the relevant policies, the availability of units within the Park and the wide range of units available within a close proximity to the Park’s boundary it is considered that the local need for employment and training development can be met and that there is no need for the additional allocation of employment land within Snowdonia National Park. The Snowdonia Enterprise Zone has been designated at a national level by the Welsh Government and therefore will be allocated as an employment site with a policy to support appropriate development.

IMPLICATIONS FOR THE PLAN

15.1 The Authority will allocate on the proposals maps the Snowdonia Enterprise Zone site at Llanbedr and Trawsfynydd (further information is contained in appendix 2). A specific criteria based policy supporting new development in the Enterprise Zone which is compatible with National Park purposes will be drafted. The policy will encourage and allow new development based on the sectors already identified for the Enterprise Zone. The policy will support innovative, good design which is sustainable, provides quality new job opportunities and can demonstrate that bio-diversity and landscape impacts have been kept to a minimum.

15.5 In order to safeguard existing employment or businesses premises a small change to development policy 19 is proposed to strengthen the policy.
Appendix 1

Existing Policy Context - Eryri Local Development Plan (2007-2022)

Strategic Policy H: A Sustainable Rural Economy

In order to create and retain a sustainable rural economy the National Park Authority will;

- Support new employment development in the local service centres, service settlements and secondary settlements. The nature and scale of the development must be commensurate with the settlement’s size and function
- Promote the re-use of underused or redundant land or buildings for economic or employment purposes
- Support the agricultural sector and opportunities for rural diversification that do not negatively impact on the ‘Special Qualities’ of the National Park
- Support tourism and recreation activity which maximise local economic benefits, minimise environmental impact and safeguard the ‘Special Qualities’ of the National Park
- Encourage proposals which would provide appropriate supportive infrastructures to sustain and promote the local economy
- Support live-work units and home working

Proposals for the re-use of existing employment land or buildings for other purposes will only be permitted where;

- The new use would result in significant improvement to the environment which outweighs the loss of employment land or,
- The retention of the employment facility is no longer viable and it cannot be re-used for alternative employment purposes and the employment potential has been advertised on the market for at least one year

Development Policy 19: New employment and training development

Within or adjacent to the main built area of a local service centre, service settlements and secondary settlements, the following types of small scale employment and training developments will be appropriate;

- The re-use of existing buildings where the building has sufficient land and storage space attached for the functional needs of the proposed use
- The expansion of an existing facility or business
• New buildings where there is no other suitable accommodation available in the locality

In the open countryside the conversion of an existing building for small scale employment and training purposes to meet local needs will be appropriate where;

• The building is of sound construction and its conversion is possible without major or complete reconstruction of the original building
• The conversion and use of the building or the use of any surrounding land for the provision of access, parking facilities, ancillary structures, on site facilities or storage areas, has no adverse impacts on the character of area
• There is sufficient land and storage space attached for the functional needs of the proposed use including parking
• It accords with Development Policy 9: Conversion and change of use of rural buildings
Appendix 2: Snowdonia Enterprise Zone Site Appraisals

The Authority has received two sites to be considered as employment site allocations in the revised Eryri LDP. The former nuclear power station site at Trawsfynydd and Llanbedr Airfield have been designated at a national level by the Welsh Government, as the Snowdonia Enterprise Zone (SEZ). SEZ was designated in 2012 - this was a national level Welsh Government designation and it has not yet been established into any adopted local planning policies. While an indication of the types of employment uses proposed for the sites have been provided, specific information about the types of development required to deliver these uses has not been provided. As a result, it is difficult to undertake a detailed assessment of the sites for the purposes of the LDP. The Authority would expect to be involved with more detailed master planning for the site and detailed assessments undertaken for this purpose. Below is a site assessment for both the Llanbedr and Trawsfynydd sites using objectives taken from the Authority’s Site Appraisal Framework to provide as much detail as we have available.

1) Site Assessment Enterprise Zone – Llanbedr

Economic Viability
The site lies with a reasonable distance of a number of local centres including a number of coastal settlements and larger settlements including Porthmadog and Penrhyneddudraeth. It is understood that Enterprise Zone status comes with public sector support (both officer support and fiscal incentive) which may also enhance site viability.

Accessibility and Ease of Movement
The site is located on the edge of Llanbedr, which has a number of local facilities and services. Access through the village of Llanbedr is problematic, with some pinch points in the village. New road improvements are proposed by Gwynedd Council as the Highways Authority, and the Authority is currently in the process of determining an application for a by-pass. The by-pass would result in a significantly improved access to the site.

Environmental Considerations
Part of the site lies within an area of flood risk and the Shoreline Management Plan at this location advocates no active intervention and managed re-alignment in the Artro Estuary. An FCA has been requested to assess the acceptability of the site with regards to the flood risk and the assess the implications of the SMP. Until this assessments conclusions are received and assessed by NRW it is not possible to fully address the flood risk issue and any implications this may have on the potential to develop the site. There are ecological designations including SSSI, SAC and a NNR near to the site. Detailed information and assessment can be found within the Sustainability Appraisal and the Habitats Regulation Assessment Addendum. The site is a former airfield and much of the northern part of the site can be classified as previously developed land. Re-development of the existing
buildings on the site could result in the removal of existing poorly designed buildings therefore could improve the impact of the site on the landscape in this location – although there may be heritage value in some of the Airfield’s buildings. No information has been provided by the site proposer with regards to contaminated land.

The LANDMAP visual and sensory evaluation is moderate for the majority of the site and high for a small part of the site. The evaluation is based on the coastal views in this location with reference to the airfield and nearby caravans as detractors. The historic landscape value evaluation is moderate and this is due to it being a good surviving example of a Second World War airfield. The cultural evaluation is considered as high due to the rich archaeology of this area, this is considered in a much wider context and not specific to the airfield site.

The Llanbedr airfield lies within the Morfa Dyffryn Landscape Character Area (LCA). The Landscapes and Seascapes of Eryri SPG outlines that this LCA has extensive open views from the surrounding hills over the coastal plain towards the sea and these should be protected. It also outlines that future opportunities to sensitively re-develop or restore the airfield site will be pursued, taking into account its strong visibility within the open landscape. The Landscape and Sensitivity Capacity Assessment outlines that the key characteristics of the LCA are as follows:

- Medium scale, open landscape
- Flat coastal landscape
- LCA comprised of large areas of Dunes, the area known as Mochras and Llanbedr Airfield

This assessment was undertaken specifically to look at the landscape sensitivity of particular development types (wind turbines and static caravan sites), however the overall sensitivity can be considered when assessing this sites suitability for development. It is considered that the industrial size and nature the buildings within the northern part of the airfield in particular are a particular visual detractor and redevelopment and future development of this site could result in an improvement in this location. Any new development on the site will have to take into consideration the existing heights and scale of the buildings. The site lies within an area of high cultural importance and this will need to be considered should any future development occur on the site.

**Site context and character**

There are no topographical characteristics which would present an obstacle to development on the site. Large parts of the site are open within the setting of the landscape and development here would have an impact on the views in this location. However, the part of the site already developed (to the north) provides opportunities for further development without impacting on the landscape. There is a large campsite nearby and this could potentially result in conflicting land uses depending on the scale and exact type of development proposed for the site.
Continuity and Enclosure
Part of the site is already developed; new development in the open areas of the site could result in sporadic development, which would be unsuitable within this location.

Site Deliverability
According to the information submitted by the Welsh Government, the site is financially viable for development. The site is being actively marketed on the Welsh Government website.

National Park Purposes and the Welsh Language
Compatibility with the National Park Purposes will depend on the scale of any proposed development. Should major development occur this may conflict with National Park Purposes, however smaller scale development at the site could provide much needed employment to the area. This would be in line with the National Parks duty to seek to foster the economic and local well-being of local communities within the National Park. Development on the site could have both positive and negative impacts on the Welsh Language. Employment could provide a number of jobs for the local population thereby supporting the Welsh language however large scale development would need careful assessment to ensure it does not adversely impact the Welsh Language. Further information is contained within the Welsh Language Impact Assessment.

Conclusion
Following the assessment outlined above and having given consideration to the National Park purposes and the potential landscape impacts of development at this site, it is considered that the whole site is unsuitable for development. Therefore, it is proposed to allocate the already partly developed northern part of the site as a developable area. As outlined above redevelopment of this site could improve the visual amenity of the area. Development on the wider site will be determined on a case-by-case basis assessed against policies within the LDP. A Policy will be drafted to ensure that the development:

- Will not have an impact on the special qualities of the National Park
- that the siting, form and scale of the development is appropriate to the site,
- that the development will not have an adverse visual impact on the landscape character
- and that neighbouring sites of ecological importance are protected.

Further information will be required, as part of developing a future masterplan and further assessments may need to be undertaken during this time.
2) Site Assessment Enterprise Zone – Trawsfynydd

Economic Viability
The site lies on the A470, which is the main route between North and South Wales. The site has good access links with, Dolgellau, Blaenau Ffestiniog, Penrhydeudraeth and Porthmadog.

Accessibility and Ease of Movement
The site is located on a trunk road with good accessibility. It is close to the settlement of Traswfynydd which has some services.

Environmental Considerations
Part of the site lies within an area of flood risk however, this is mostly the area directly related to the lake where development will not take place. There are a number of ecological designations, which affect this site. These include a Scheduled Ancient Monument (Tomen y Mur, SAM), ancient woodlands and an historic park and garden and its essential setting. Coed y Rhygen SAC and NNR are adjacent to part of the site. Parts of the site are wooded and development here may result in the loss or trees and hedgerows.

Part of the site is previously developed land owing to the Nuclear Power station development. As this site is a former nuclear power station there is the risk of contaminated land, further information may be required when considering future applications for the site. Much of the site (with the exception of the lake) is well screened by existing mature trees and therefore development on certain parts of the site would be well screened. As outlined above part of the site is designated as a SAM, Tomen y Mur has national cultural heritage value and would need to be protected from development.

The LANDMAP visual and sensory evaluation is typically moderate with a high evaluation on a small part of the site but evaluation is as a result of the wider Rhinogau area. The historic evaluation of the site is typically high to outstanding and this is due to the presence of Tomen y Mur SAM and also historic evaluation of the Power Station itself. The cultural landscape is also considered to be outstanding but this is mainly due to other factors within this aspect area which are not close to the Trawsfynydd site.

The landscapes of Eryri SPG states that within this LCA the landscape is dominated in the north by the Llyn Trawfynydd reservoir and former Nuclear Power Station. The suggested strategy for the future in this location is to protect and enhance the natural beauty, especially the qualities of tranquillity and remoteness.

The Landscape and Sensitivity Capacity Assessment undertaken by the National Park the outlines that the key characteristics of the LCA are as follows:

- Large Scale upland and exposed landscape
- Rugged mountains and valleys
- Influenced (in the north east) by Llyn Trawsfynydd.

This assessment was undertaken specifically to look at the landscape sensitivity of particular development types however the overall sensitivity can
be considered, when assessing this sites suitability for development at this site. The Trawsfynydd Power Station is a prominent man-made landmark within this LCA.

Site context and character
There are no topographical characteristics which present an obstacle to development. As outlined above large parts of the site are well screened by mature trees and therefore development on this part of the site could be acceptable. As the site is within open countryside, in this location there are unlikely to be any potentially adverse impact from conflicting adjoining land uses.

Continuity and Enclosure
The very large portion of the site would encroach on to areas which is considered important to protect in terms of tranquillity and remoteness and development here could have an unacceptable impact.

Site Deliverability
According to the information submitted by the Welsh Government the site is financially viable for development and the site is being actively marketed.

National Park Purposes and the Welsh Language
Compatibility with the National Park Purposes will depend on the scale of the development. Should major development occur this would not be compatible with the National Park Purposes however smaller scale development at the site could provide much needed employment to the area. This would be in line with the National Park’s duty to seek to foster the economic and local well-being of local communities within the National Park. Development on the site could have both positive and negative impacts on the Welsh Language. Employment could provide a number of jobs for the local population thereby supporting the Welsh language however large scale development could impact the Welsh Language. Further information is contained within the Welsh Language Impact Assessment.

Conclusion
Given the large number of designations which the Authority considers essential to protect, it is considered that the site is too large and should not be allocated as submitted through the candidate site process. The landscape is also a consideration in this location especially the tranquillity and remoteness, as outlined above. The landscape should be protected from inappropriate development and therefore a large designation should be avoided. It is essential that Tomen y Mur is protected from development and therefore including it with an employment allocation is inappropriate. As a result, a smaller site is proposed, to focus the developable area thus ensuring that any potential developers are provided with a clear indication of the area the Authority considers is suitable for future development. A policy supporting the allocation will be drafted to ensure that development at the site is appropriate within the context of the National Park and the environmental considerations outlined above.