

Isle of Anglesey County Council	
Report to:	The Executive
Date:	18th July 2023
Subject:	Improving the reliability and the resilience across the Menai Straits
Portfolio Holder(s):	Cllr. Llinos Medi (Economic Development) & Cllr. Dafydd Rhys Thomas (Highways, Waste and Property)
Head of Service / Director:	Christian Branch Head of Service – Regulation & Economic Development Huw Percy Head of Service – Highways, Waste and Property
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Local Members:	Relevant to all Elected Members

A –Recommendation/s and reason/s

Recommendations:

The Executive:

- 1) Endorses the report and its conclusion that Welsh Government should not view the Menai Crossing as a simple road project and adopt a positive policy position recognises the critical need to improve the reliability and resilience of the Menai Straits.**
- 2) Delegates authority to the Chief Executive to submit the Council's evidence base to the North Wales Transport Commission ahead of the July 28th deadline.**

The North Wales Transport Commission (NWTC) Progress Statement January 2023 acknowledges that North Wales is reliant on private vehicles. It states...

There is a current lack of attractive or realistic sustainable transport alternatives to the private vehicle for journeys by residents, workers, and visitors in North Wales. This is contributing towards dependency on private vehicles and limiting social, economic and cultural connections.

For Anglesey, the position is even worse. The congestion and lack of resilience for the Menai crossings is severely limiting or having a profound negative impact on social, economic, educational, health and cultural connections to and from the rest of the country. Worse than that, it is hampering the island's ability to attract the businesses and economic activity it needs to reduce a cycle of job losses, lower on-island employment and increasing reliance on off-island jobs.

The decision of the Welsh Government as recommended by the Roads Review Panel to cancel the proposed Third Menai Crossing will exacerbate the challenges faced by the island's economy and hinder the successful implementation of key

A –Recommendation/s and reason/s

policies that seek to rebuild its employment base and reduce the need of its residents to leave the island to work.

The Menai Bridge has been the subject of recent emergency works due to its age, resulting in reduced capacity due to partial or full closure. It was recently closed for 5 months between 21st October 2022 and 2nd February 2023 with further inspections required every six weeks to check these works. As a result of the closure there were multiple reports of 'complete chaos' <https://www.dailypost.co.uk/news/north-wales-news/complete-chaos-menai-bridge-closure-25354509> which affected visitors, residents and businesses.

In May 2023 there was unfortunately a fatal road collision near the Britannia Bridge. This resulted in the closure of the bridge from 03:00 until 12:35 and the effects were significant on the residents of Anglesey including the students of David Hughes who were sitting important, external exams. There were also wider secondary issues on the diversion of traffic through Llanfairpwll which forced all vehicles on the old A5 which is no longer fit-for-purpose for those volumes and vehicle types.

The poor connectivity and lack of resilience of the road network, as well as increasing congestion negatively affect Anglesey's attractiveness for investment and businesses locating here. This is limiting the overall economic growth, but particularly, an unreliable road network could affect Anglesey's positioning as the optimal location for nuclear industry investment, as well as the competitiveness of the Port of Holyhead, recently designated as a Freeport. There is a real risk that the Freeport can't maximise its effectiveness as a result of the uncertainty and lack of resilience the transport network offers.

The Welsh Government has established the North Wales Transport Commission (NWTC) who released their interim report (link <https://www.gov.wales/north-wales-transport-commission-interim-report-june-2023>) but are welcoming further evidence up to 28th July 2023 before issuing their final recommendations. It is imperative that the Council inputs into and influences the outcome of this report.

To that end the County Council commissioned Quod to prepare a detailed evidence base to support the County Council's submission to the NWTC on the need for an improved multi-modal crossing of the Menai Strait.

This evidence base (please see Annexes A and B) which responds directly to the Terms of Reference (link [Terms of reference: North Wales Transport Commission | GOV.WALES](#)) of the NWTC is structured in the following way:

1. Anglesey in context – an overview of the geography of Anglesey, a description of the two Menai Strait crossings and general commuting patterns.
2. Current travel patterns between Anglesey and the mainland – an overview of the congestion across the existing two bridges and comparison between private vehicles, public transport and cycling as a mode of commuting around and off the island.

A –Recommendation/s and reason/s

3. Doing nothing exacerbates the socio-economic challenges – a description of the existing socio-economic challenges and their links to reliable and resilient access to Anglesey from the mainland.
4. Policy and strategic alignment – an evaluation of how improving reliability and resilience across the Menai Strait aligns with various national, regional and local policies.
5. Anglesey's economic future – an overview of the planned projects in Anglesey to improve its economic conditions and their dependency on reliable and resilient access to Anglesey from the mainland.
6. Benefits of a third crossing – a brief summary of the benefits of a Third Menai Crossing extending beyond time saving benefits.

The key findings of the evidence base can be summarised as follows:

1. There is an undeniable lack of resilience as it currently stands which has a significant negative impact across health, education, the economy, residents, visitors, Port access and culture.
2. This is wider than simple efficiency savings on journey times.
3. The lack of resilience results in concerns over safety and reliability.
4. Lack of other, viable transport modes – bus, rail, walking, cycling – has resulted in high private car ownership and it is the only real option on Anglesey.
5. Freeport designation, Energy Island and MSParc will drive innovation and the real potential to create high value job opportunities.

The findings of the NWTC interim report for June 2023 highlighted the below as possible options:

- Three lanes running or tidal flow on Britannia Bridge.
- Reconfiguration of A55 junctions adjacent to Britannia bridge.
- Provision of active travel on Britannia bridge.
- Priority for active travel on the Menai Suspension bridge.
- Priority for active travel and buses on the bridges.
- Wind deflectors on Britannia bridge.

The County Council has considered the options previously and is of the view that these will not sufficiently address the lack of resilience that exists.

The resilience and reliability of the Menai crossing goes beyond just transport related benefits, it is more than simple road scheme and demands to be looked at within a wider, more long-term strategic context.

It is hoped that through submitting this evidence base the Commission will better understand the continuing issues of how a lack of a resilient transport network, as well as a lack of sustainable transport options is negatively impacting Anglesey and its residents across economic, health, education, social, leisure and investment legacy impacts.

B – What other options did you consider and why did you reject them and/or opt for this option?

Doing nothing is not an option – given the historical issues with the resilience of the crossing to the mainland, the Council must submit the strongest possible evidence to the North Wales Transport Commission.

C – Why is this a decision for the Executive?

Securing the formal support and endorsement of the Executive is important given the importance of the subject at hand and the high degree of local stakeholder interest.

This also builds on previous discussions held, including that at the Full Council on 23rd May 2023

<https://democracy.anglesey.gov.uk/ieListDocuments.aspx?CId=127&MId=4173&Ver=4&LLL=0>

Ch – Is this decision consistent with policy approved by the full Council?

Yes.

D – Is this decision within the budget approved by the Council?

No – no impact on the budget.

Dd – Assessing the potential impact (if relevant):

1	How does this decision impact on our long term needs as an Island?	N/a
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	No
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	No
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	N/a
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	N/a

Dd – Assessing the potential impact (if relevant):

6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	N/a
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	N/a

E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	
2	Finance / Section 151 (mandatory)	
3	Legal / Monitoring Officer (mandatory)	
4	Human Resources (HR)	
5	Property	
6	Information Communication Technology (ICT)	
7	Procurement	
8	Scrutiny	
9	Local Members	

F - Appendices:

Improving the reliability and resilience across the Menai Strait x2 reports

Ff - Background papers (please contact the author of the Report for any further information):

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Ynys Môn

THE ISLE OF

Anglesey

Improving reliability and resilience
across the Menai Strait

Detailed evidence base

June 2023



CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
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1 Purpose of this document

- 1.1 This document is a detailed evidence base to support the Isle of Anglesey County Council (IACC)'s submission to the North Wales Transport Commission (NWTC) on the need for an improved multi-modal crossing of the Menai Strait. Key findings have been lifted from this detailed evidence base for the purposes of the submission.
- 1.2 This detailed evidence base has been produced by Quod, a specialist economics and planning consultancy on behalf of the Isle of Anglesey County Council (IACC).

2 Introduction

- 2.1 The North Wales Transport Commission Progress Statement January 2023 acknowledges that North Wales is reliant on private vehicles.

There is a current lack of attractive or realistic sustainable transport alternatives to the private vehicle for journeys by residents, workers, and visitors in North Wales. This is contributing towards dependency on private vehicles and limiting social, economic and cultural connections.¹

- 2.2 For Anglesey, the position is even worse. The congestion and lack of resilience for the Menai crossings is severely limiting social, economic and cultural connections to the rest of the country. Worse than that, it is hampering the island's ability to attract the businesses and economic activity it needs to reduce a cycle of job losses, lower on-island employment and increasing reliance on off-island jobs.
- 2.3 The decision of the Welsh Government as recommended by the Roads Review Panel to cancel the proposed Third Menai Crossing² will exacerbate the challenges faced by the island's economy and hinder the successful implementation of key policies that seek to rebuild its employment base and reduce the need of its residents to leave the island to work.
- 2.4 This report has been produced by IACC to set out the latest available statistics and set out the economic and social implications of doing nothing along with the benefits of the additional crossing.
- 2.5 Doing nothing does not mean preserving the status quo - it is likely to mean further job losses on the island and the loss of the unique opportunities in low carbon energy and tourism that will arise in the next decade.

Context for the report

- 2.6 In 2016, a Strategic Outline Case (SOC) was produced by AECOM for a Third Menai Crossing.
- 2.7 The SOC identified the key problems associated with the current travel situation. These primarily relate to congestion and rat running (affected by daily commuting, holiday peaks, and freight traffic) and poor network resilience due to safety requirements and resulting bridge closures.
- 2.8 Poor connectivity and resilience of the road network, as well as increasing congestion negatively affect Anglesey's attractiveness for investment and businesses locating there. This is limiting the overall economic growth of the area, but particularly, an unreliable road network could affect Anglesey's positioning as the optimal location for nuclear industry investment, as

¹ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

² <https://www.gov.wales/programme-future-road-investment-html>

well as the competitiveness of the Port of Holyhead (which has recently been designated as a Freeport capable of supporting up to 13,000 jobs and £1bn of economic growth).

2.9 In summary, the Strategic Case of the SOC identified that a 'Do Nothing' option would be unacceptable. Not addressing the current issues and projected traffic growth would be a major risk to economic growth and regeneration of Anglesey.

2.10 The identified impacts of doing nothing include³:

- Worsening traffic congestion on the existing bridges, due to predicted 9% growth in car trips across North Wales between 2015 and 2030.
- Diversion of trade away from the Port of Holyhead, as a result of comparative advantage of alternative freight distribution routes.
- Loss of economic competitiveness, leading to businesses locating elsewhere.
- Congestion worsening accessibility for local residents, including for work opportunities and day-to-day services.
- Congestion affecting attractiveness of the area for tourists, resulting in loss in visitor spending.

2.11 The SOC concluded that a third crossing would double the capacity of the A55, improve journey times (and journey time reliability), improve the accessibility and service quality for non-motorised users, as well as reduce frequency and severity of accidents⁴.

2.12 Additional benefits of improving the resilience of the Menai Strait crossings include:

- Societal benefits such as social inclusion, improved physical fitness and improved access to work, education, health and leisure activities.
- Environmental benefits from less queueing and idling leading to more efficient engine operation and lower emissions, and increased uptake of active modes of transport due to segregated facilities.
- Improving attractiveness for visitors to the island as tourism is one of the largest employment sectors on Anglesey.
- Supporting employment opportunities through inward investment from Anglesey's recent Freeport designation and the Anglesey Energy Island Programme.

2.13 However, on 14 February 2023, the Roads Review Panel advised the Welsh Government to halt development works on the Third Menai Crossing, which was accepted by the Welsh Government.⁵ The panel concluded that the case for the scheme is not well aligned with the Welsh Government's aim to reduce car mileage even though the panel acknowledged that congestion and lack of resilience of the crossings make Anglesey less attractive for investment, limiting its future economic potential. The benefits of the Crossing directly link with several national, regional and local policies. These are discussed further in Section 6.

³ https://www.gov.wales/sites/default/files/publications/2019-01/180309atn12021doc1_0.pdf

⁴ Ibid.

⁵ <https://www.gov.wales/programme-future-road-investment-htm>

2.14 The scheme has a good Benefit Cost Ratio (BCR) of between 1.8 and 2.2⁶ with 90% of total benefits from journey time savings. This BCR is likely to be understated because:

- Resilience and reliability benefits are not fully captured.
- The Welsh Transport Appraisal Guidance (WelTAG) underweights the value of freight. The Port of Holyhead is the UK's second largest roll-on roll-off ferry port after Dover.⁷
- The benefits don't capture effects on business investment and land use changes, e.g. changes in freight trips.

2.15 While the IACC supports policies to deliver Net Zero, it disagrees with the panel's "one size fits all" approach to reducing car mileage as in some circumstance it is not necessary to reduce the average vehicle mileage. As the National Infrastructure Commission for Wales pointed out in their response to the panel's findings:

...with rural areas being less densely-populated, it is likely that active travel and public transport is less practical for more journeys than Wales' urban areas..." and "Therefore, decisions taken today will need to differ depending on the locality..."⁸

2.16 Anglesey is rural. Reducing the average vehicle mileage becomes difficult and reliance on public and active modes of transport becomes challenging as well.

2.17 Anglesey is also peripheral and severed by the mainland. It contains the Port of Holyhead, which is a crucial connection between the Republic of Ireland and the rest of Europe. It has recently been awarded a Freeport designation and along with its unique opportunities for low carbon energy projects creates the potential for high-value employment on the island.

2.18 The above features make Anglesey unique. The Third Menai Crossing is not a typical road scheme as it includes economic, social, resilience and reliability benefits for Anglesey and Wales and the benefit go well beyond typical user benefit time savings.

Structure of the report

2.19 The report is structured as follows:

- **Section 3: Anglesey in context** – an overview of the geography of Anglesey, a description of the two Menai Strait crossings and general commuting patterns.
- **Section 4: Current travel patterns between Anglesey and the mainland** – an overview of the congestion across the existing two bridges and comparison between private vehicles, public transport and cycling as a mode of commuting around and off the island.
- **Section 5: Doing nothing exacerbates the socio-economic challenges** – a description of the existing socio-economic challenges and their links to reliable and resilient access to Anglesey from the mainland.

⁶ <https://www.gov.wales/sites/default/files/publications/2023-02/the-future-road-investment-wales.pdf>

⁷ <https://www.itv.com/news/wales/2019-10-08/holyhead-the-uk-s-second-biggest-ferry-port-absolutely-not-ready-for-a-no-deal-brexite>

⁸ <https://nationalinfrastructurecommission.wales/2023/02/15/reviewing-roads-review/>

- **Section 6: Policy and strategic alignment** – an evaluation of how improving reliability and resilience across the Menai Strait aligns with various national, regional and local policies.
- **Section 7: Anglesey's economic future** – an overview of the planned projects in Anglesey to improve its economic conditions and their dependency on reliable and resilient access to Anglesey from the mainland.
- **Section 8: Benefits of a third crossing** – a brief summary of the benefits of a Third Menai Crossing extending beyond time saving benefits.

3 Anglesey in context

- 3.1 Anglesey's peripheral location means that it is mostly rural and sparsely populated. The number of jobs and jobs density is low even for a rural area. As a result, the area is highly dependent on the mainland as a source of employment and for key facilities such as acute hospital and university. Nearly 40% of Anglesey residents commute of the island for work and mostly reside close to the existing two bridges.
- 3.2 Anglesey has the only travel to work area (TTWA) in the Wales that is severed by water. Access to mainland Wales is only possible via two crossings, both of which have reliability and resilience issues. This complicates the situation for the residents, visitors, businesses and the Port of Holyhead.
- 3.3 The combination of Anglesey's peripherality and its severance from mainland Wales pose significant issues for its community and economy.

Overview

- 3.4 Anglesey covers over 67,300 ha of land. The largest town is Holyhead, and the other key towns are Llangefni, Amlwch, Menai Bridge, Llanfairpwllgwyngyll and Beaumaris.
- 3.5 It is also the home of the Port of Holyhead, the second largest Ro-Ro port in the UK (after Dover) and the now decommissioned Wylfa nuclear power station, as well as several other large brownfield sites, such as Anglesey Aluminium and Rhosgoch.
- 3.6 There are 68,900 residents with c. 23,000 jobs. Currently, 58% of the population lives in rural areas and this has remained consistent since 2011 as shown in [Table 3-1](#) below.

Table 3-1: Anglesey has remained mostly rural⁹

	2011	2021
Urban population	28,757 (41%)	28,837 (42%)
Rural population	40,994 (59%)	40,037 (58%)
Total	69,751	68,874

- 3.7 The peripheral location of Anglesey with limited rail and public transport provision means that it is less densely populated than the rest of Wales both in terms of residential and working population. These are shown in [Figure 3-1](#) and [Table 3-2](#) below.

⁹ NOMIS 2023.

Table 3-2: Anglesey population and employment densities are low compared to Wales¹⁰

	Number of residents	Residents per square kilometre	Employment	Employment per square kilometre
Anglesey	68,900	97	23,000	32
Wales	3,107,500	150	1,335,500	64

3.8 Anglesey is 35% less densely populated than Wales and its employment density is only half of that of Wales. This indicates that:

- There is high commuting off the island, which means a reliable and resilient crossing is important.
- Public and active modes of travel are less suitable alternatives on the island than in most other parts of Wales.

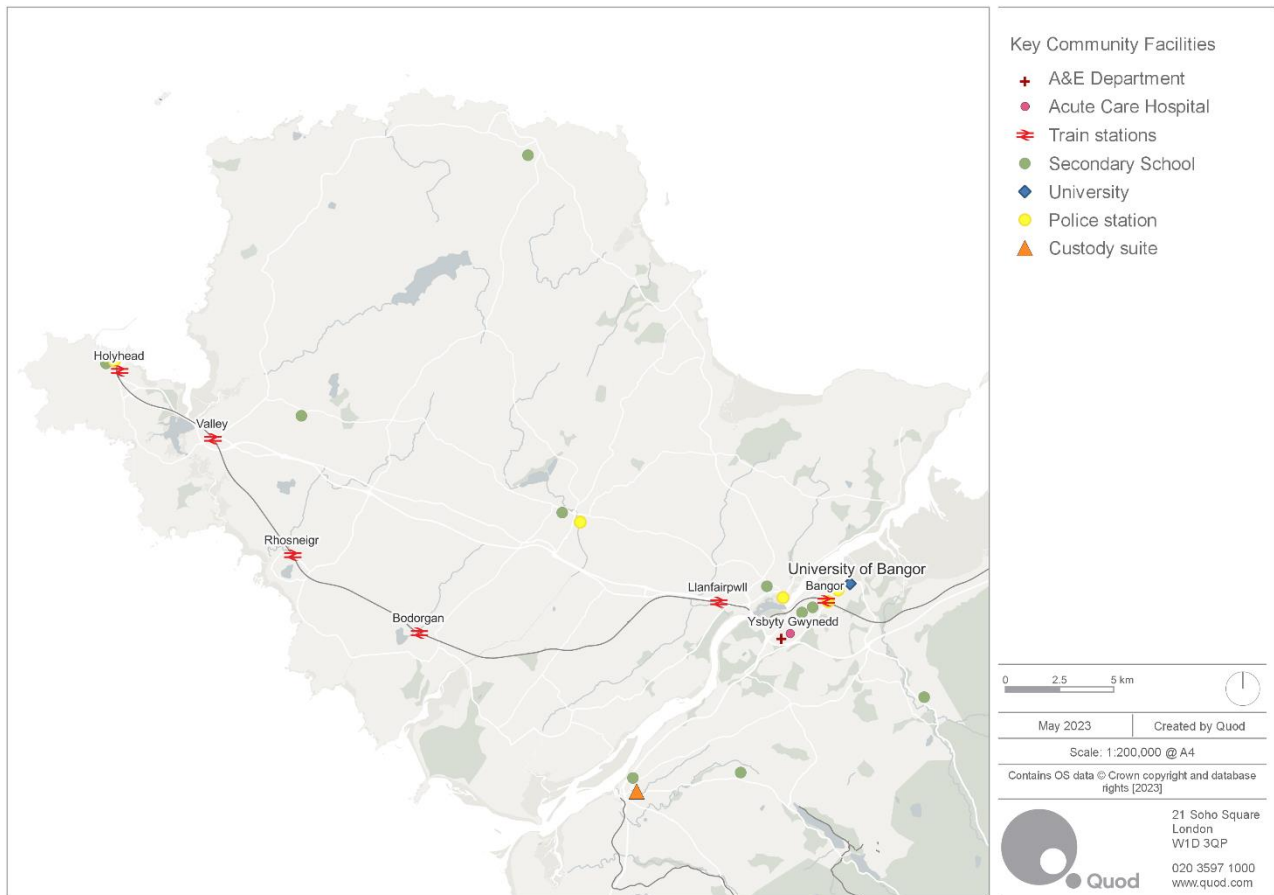
¹⁰ NOMIS 2023, Business Register and Employment Survey (BRES) 2021.

Figure 3-1 Peripheral location of Anglesey in the context of Wales



3.9 Furthermore, the closest community facilities such as an A&E department, acute care hospital (Ysbyty Gwynedd) including emergency mental health services, custody suite and higher educational facilities such as a university are all located on the mainland as shown in Figure 3-2 below. Access to these critical facilities is dependent on the reliability and resilience of the existing crossings across the Menai Strait.

Figure 3-2: Map of community and educational facilities



Both bridges have their drawbacks

3.10 Currently there are two bridges that connect Anglesey to the mainland – both constructed in the 1800s:

- A5 Menai Suspension Bridge – between Bangor and Menai Bridge.
- A55 / E22 Britannia Bridge – between Capel-y-graig and Llanfairpwllgwyngyll.

3.11 The A55 / E22 Britannia Bridge is a main arterial route in Anglesey connecting the mainland with the Port of Holyhead.

3.12 Due to the bridges’ ages and restricted sizes, they both currently face significant issues impacting on the reliability of the road network as shown in Table 3-3 below:

Table 3-3: Issues with Menai Suspension Bridge and the Britannia Bridge

Menai Suspension Bridge	Britannia Bridge
Regular maintenance required due to the age of the bridge (nearly 200 years old), resulting in reduced capacity due to partial or full closure. Recently closed for 5 months between 21 Oct 2022 and 2 Feb 2023 with	More than 150 years old and has not had any major maintenance work for several years and is therefore vulnerable to closures due to wind, incidents and accidents.

inspections required every six weeks to check these works.¹¹

Closures have impact on Emergency Services – the closest major hospital with a Trauma Unit is on the mainland.

Unable to cycle or walk during high winds.

No safe and adequate cycling provision. Cycling prohibited from using the segregated footways of the bridge, resulting in safety concerns for cyclists and impacting on congestion for motorists.

Restrictions on the type of vehicles that can access this bridge (only up to 7.5 tonnes) and speed restrictions for 30mph impact the local bus service and freight movement between the mainland and the Port of Holyhead.

Lack of enhanced safety facilities, such as hard shoulders – poor resilience with regards to emergency vehicles.

Only single carriageway on the European Road Network Route E22 and acts as a significant bottleneck to commuter and holiday traffic. It is therefore more vulnerable to accidents compared to dual carriageways, especially on the approaches. Across Wales in 2022, there were over **seven times** as many accidents on single carriageways compared to dual carriageways.¹²

Only bridge available for wide, high and abnormal loads.

Speed limits and restrictions to motorcycles, caravans and bicycles during high winds. No safe and adequate cycling provision. This bridge has had several publicly reported closures due to high winds as opposed to any other section of the A55 indicating that it is more vulnerable to wind effects.

Pedestrians are prohibited from this bridge.

During particularly high winds (gusts above 70mph) the bridge is fully closed – with no possible diversion route for vehicles over 7.5 tonnes, thus causing buses to be stuck in the same queues as other vehicles preventing local bus services from running. Since 2017, this bridge has been closed ten times. HGVs are re-directed to Parc Cybi in Holyhead to wait for restrictions to be lifted. However, there is insufficient capacity there which means HGVs park on residential streets, which leads to safety, welfare and infrastructure damage.

HGVs on the mainland travelling to Anglesey are advised to stop and pull over in a safe location along the A55, which can prove unsafe due to a lack of facilities. Parc Bryn Cegin has also been used in the past when required.¹³ This is an empty multi-million-pound industrial park looking to attract businesses. HGVs being pulled over into this park means that industrial space gets

¹¹ <https://www.gov.wales/a5-menai-bridge-frequently-asked-questions#:~:text=What%20is%20happening%3F,the%20temporary%20work%20was%20completed.>

¹² <https://stats.wales.gov.wales/Catalogue/Transport/Roads/Road-Accidents/Accident-Level-Data>

¹³ <https://www.dailypost.co.uk/news/north-wales-news/what-happens-britannia-bridge-closes-25330542>

occupied without generating employment and boosting the local economy.

Safety concerns: Lack of central reservation and close proximity of junctions either side of Britannia Bridge to the merging sections from two to one lane increasing the risk of collisions. Since 2017, there have been 12 serious accidents and two fatal accidents. These have required the closure of the bridge while recovery and investigations are undertaken.

3.13 Any closures and congestion (described in the following sections) have negative impacts on local communities (journey times, air quality impacts, Emergency Services), local businesses and port traffic.

Commuting and origin and destination of travel

Out-commuting off the island is significant

3.14 The peripheral location of Anglesey means that a lot of employment is self-contained with over 60% of the population working on the island – likely to be influenced by the time, and cost of commuting elsewhere. However, as many as 37% of working residents commute off the island, with the majority working elsewhere in Wales (33%), as shown in Table 3-4 below.

Table 3-4: Out-commuting from Anglesey

		Commuting residents of Anglesey
Work in	Anglesey	63%
	Elsewhere in Wales	33%
	Off the island (inc. elsewhere in the UK)	37%

3.15 Commuting for work to Anglesey is significantly lower, only 17% of those working in Anglesey are coming from the mainland (Table 3-5 below). The majority of this movement originates from elsewhere in Wales, particularly from Gwynedd.

Table 3-5: Commuting into Anglesey

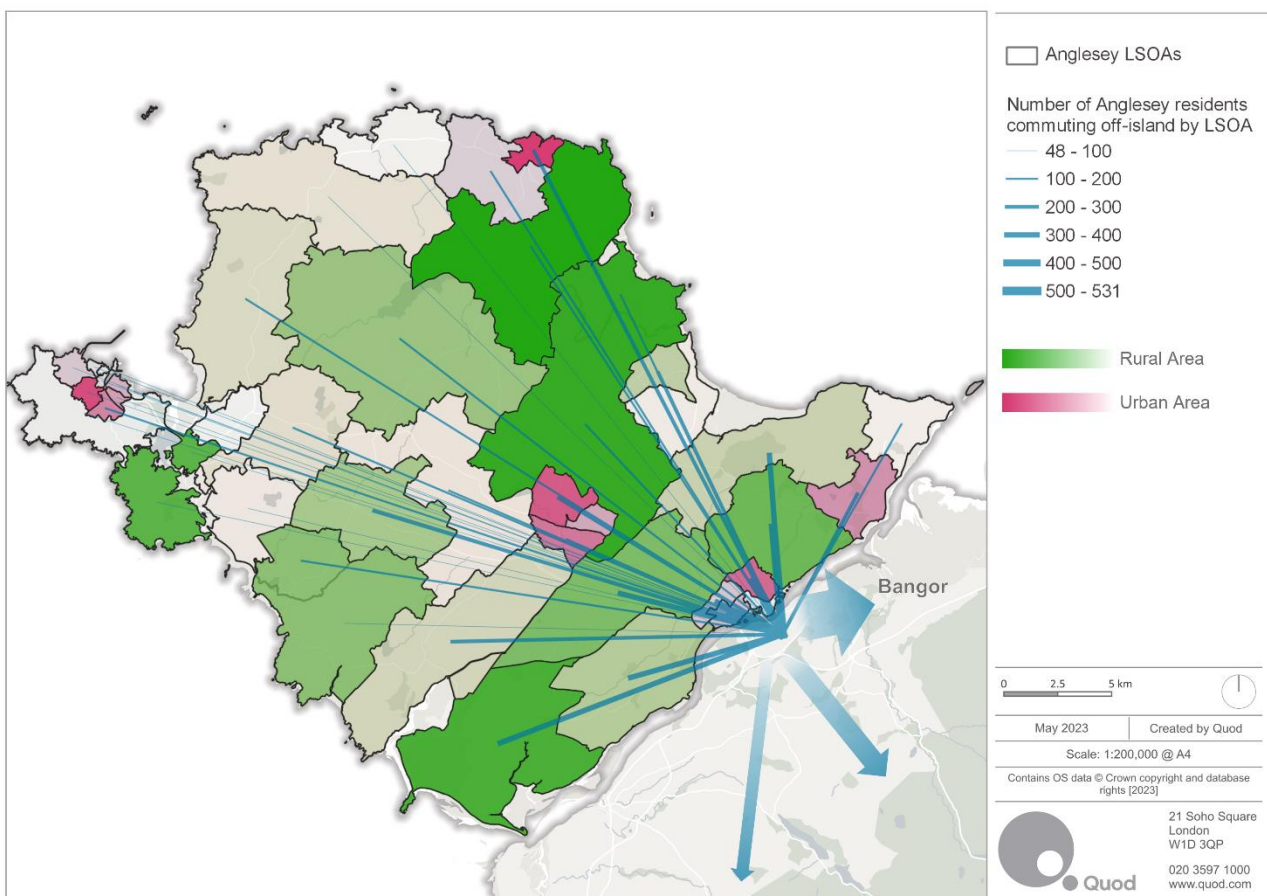
		Workers of North Anglesey
Live in	Anglesey	83%
	Elsewhere in Wales	15%

Off the island (inc. elsewhere in the UK)	17%
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Most commuters off the island live close to the bridges...

3.16 Commuters living all over Anglesey travel to the mainland, however, they primarily reside in areas close to the two bridges, which are a mixture of rural and urban areas. These include areas such as Llangefni, Llanfairpwllgwyngyll, Menai Bridge and Beaumaris. This is shown in Figure 3-3 below, where pink marks urban areas and green rural areas.

Figure 3-3: Residents commuting off the island



3.17 Figure 3-3 above also shows that there are a significant number of residents in the urban extremities of the island such as Amlwch and Holyhead that also commute to the mainland and are hence reliant on the existing bridges.

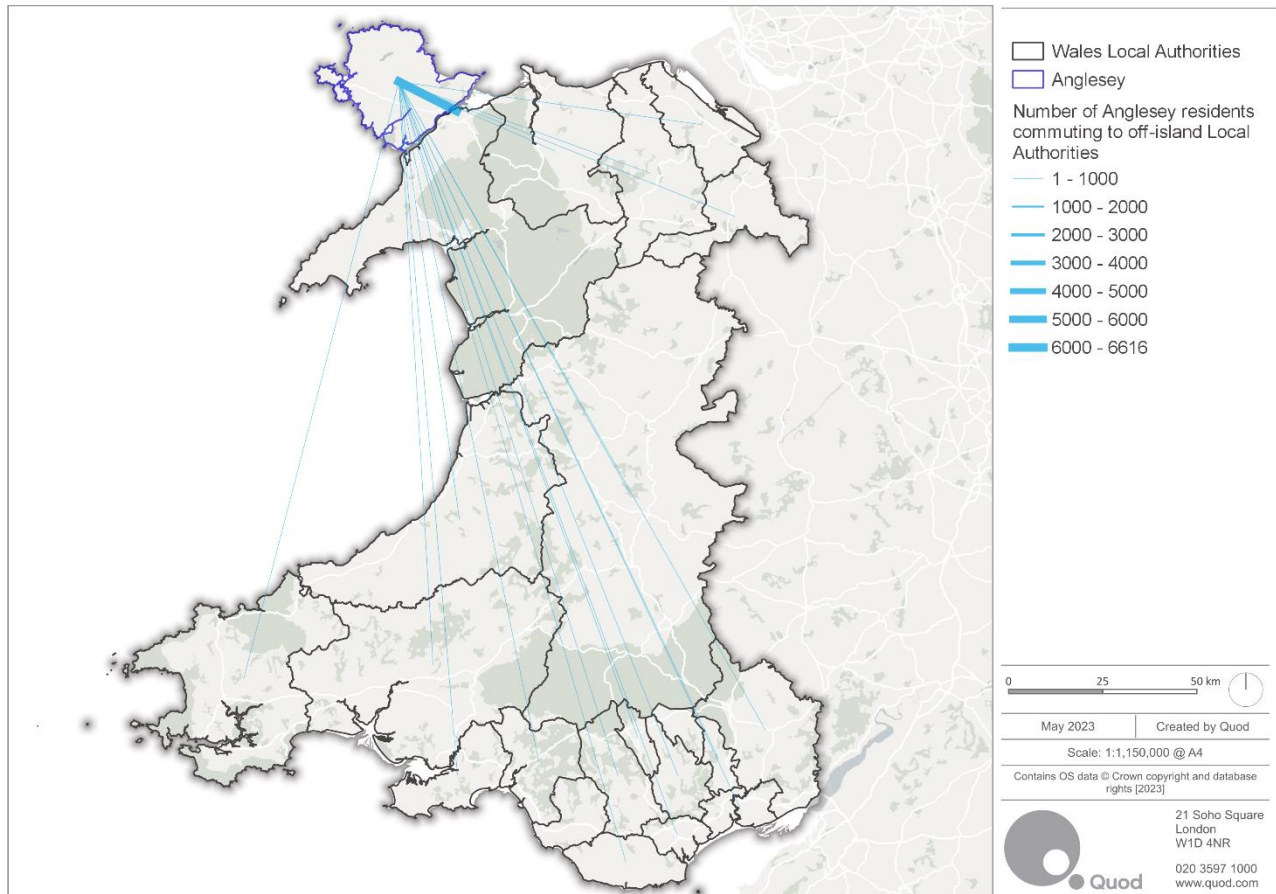
3.18 As previously mentioned in Table 3-1 and as shown in Figure 3-3 above, Anglesey is primarily rural. In North Wales, the more urbanised areas have a higher proportion of short journeys below 5km and Anglesey has one of the lowest proportion of journeys under 15km (61-64%)

in North Wales.¹⁴ This means commuters are travelling long distances especially from rural areas to access the mainland.

...and primarily travel to Gwynedd

3.19 While Anglesey residents commute to locations all over the mainland, they primarily commute to Gwynedd and Bangor as shown in Figure 3-4 above and Figure 3-5 below. This also aligns with the findings of the North Wales Transport Commission that movements to and from Bangor are important.¹⁵

Figure 3-4: Destination in Wales

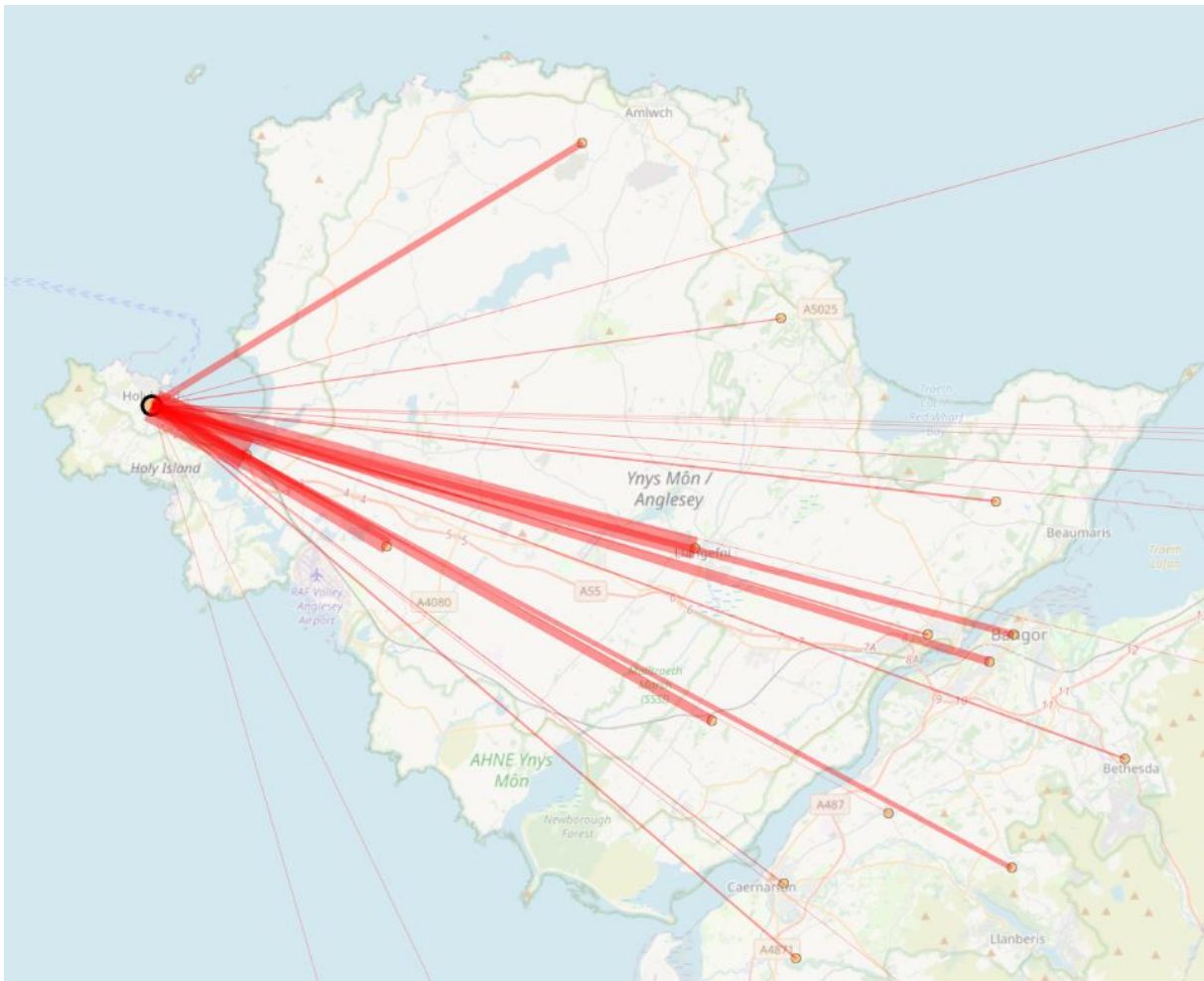


3.20 The dominant industries in Gwynedd are human health and social work activities, wholesale and retail trade, and education (Coleg Menai and Bangor University in Bangor). So, it is likely that Anglesey residents are commuting to work in Gwynedd in these industries.

¹⁴ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

¹⁵ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

Figure 3-5: Commuting patterns from Holyhead¹⁶



3.21 Figure 3-5 above further shows the commuting patterns from Anglesey's largest town, Holyhead. This demonstrates that despite Holyhead's peripheral location, a large number of working residents commute to the mainland and to Bangor.

3.22 This report builds a case for a third Menai crossing by assessing the travel patterns across the two existing bridges and the corresponding socio-economic impacts for Anglesey and Wales and the UK.

¹⁶ DataShine Commute 2023. Data: ONS, 2011 Census Data

4 Current travel patterns between Anglesey and the mainland

- 4.1 Traffic flow has increased on the Britannia Bridge over time while it has decreased on the Menai Suspension Bridge due a reduction in HGVs and a recent weight restriction of 7.5 tonnes. There is visible congestion on and around both bridges during the morning and evening peak hours. The congestion is further exacerbated by traffic travelling to and from the Port of Holyhead given the importance of this port as a gateway between the Republic of Ireland and the rest of the UK.
- 4.2 The primary mode of travel around Anglesey and for commuting off the island is a private vehicle. This is due to the expense, lack of reliability and journey times of public transport compared to a private vehicle.

Congestion across the bridges

Daily traffic flows across the Britannia bridge is high

- 4.3 The A55 is the key strategic route for North Wales, running from Holyhead to Chester. While the majority of the route is of a motorway standard, the section across the Britannia Bridge is a single carriageway.
- 4.4 As there are no alternative routes to and from the island, the average daily traffic on both bridges is high. The most recent data recorded c. 42,000 vehicles across both bridges on an average day in 2021. The traffic is not yet back to pre-pandemic levels, which were significantly higher – with an average of 52,000 vehicles travelling across the bridges daily.
- 4.5 As shown on [Figure 4-1](#) and [Figure 4-2](#), an upward trend in the numbers of all motor vehicles and HGVs has been observed on both bridges between 2000 and 2008. The following decrease in numbers may be a result of the 2008 recession.
- 4.6 On Britannia Bridge, the vehicle numbers started to increase again in 2012, resulting in a 28% increase in traffic between 2012 and 2019.
- 4.7 Menai Suspension Bridge serves a more local population, connecting Menai Bridge and Bangor through a single carriageway. A 60% reduction in 2-axle HGVs in 2010 lead to a significant drop in vehicles travelling across this bridge.¹⁷ More recently, the bridge had a vehicle weight restriction of 7.5 tonnes.

¹⁷ https://www.gov.wales/sites/default/files/publications/2019-01/180309at1sn12021doc1_0.pdf

Figure 4-1: A55 - Britannia Bridge Average Annual Daily Traffic¹⁸

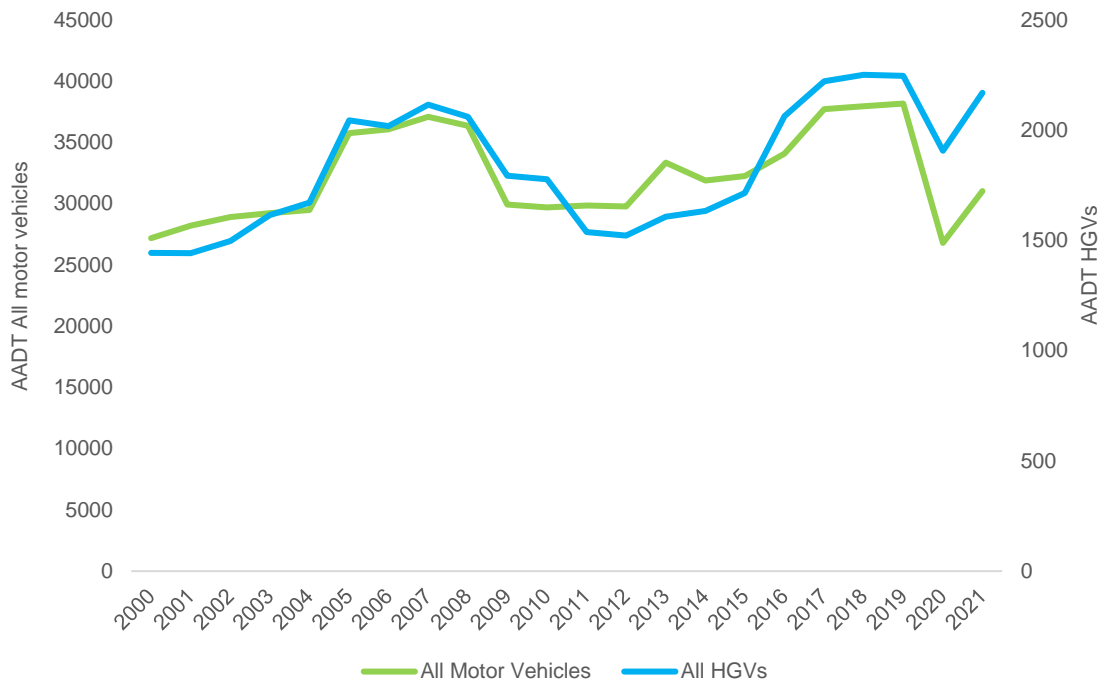
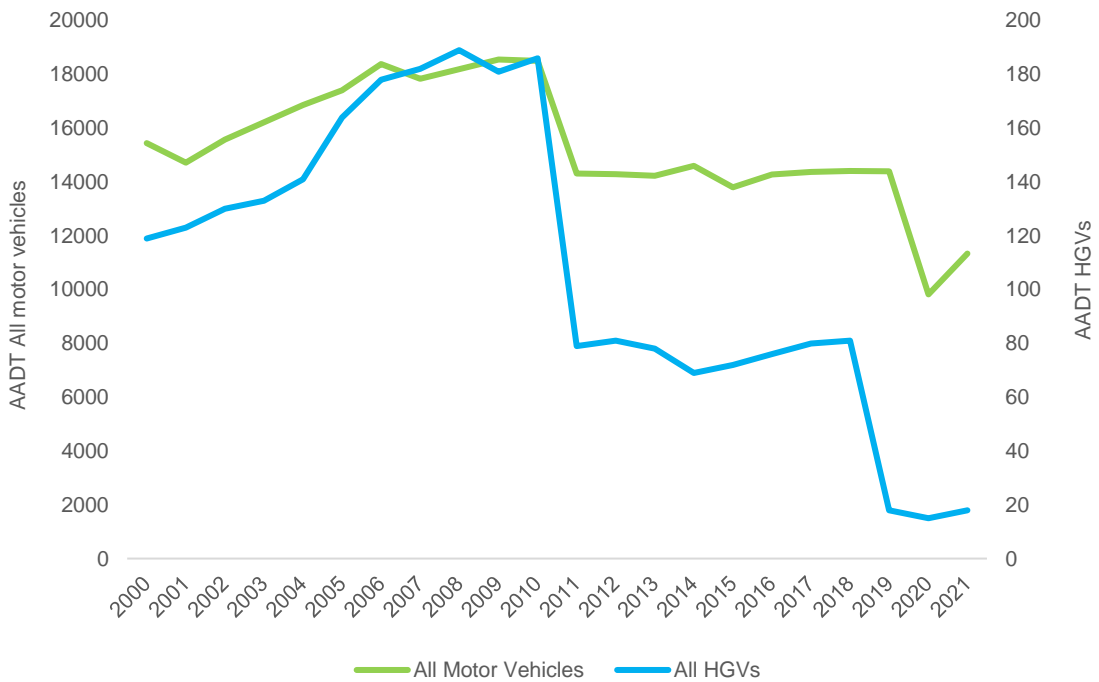


Figure 4-2: B5420 roundabout and Menai Bridge Average Annual Daily Traffic¹⁹



Congestion near and across both bridges during peak hours causes journey time delays

¹⁸ DfT, AADT data: <https://roadtraffic.dft.gov.uk/local-authorities/9>

¹⁹ Ibid.

- 4.8 Congestion across the bridges is high during the weekday AM (08:00-09:00 hours) and PM (16:00-17:00) peaks as shown in Figure 4-3 and Figure 4-4 below. The traffic is heavier in the direction of mainland during the morning peak and conversely it is heavier in the direction of Anglesey in the evening peak.
- 4.9 There are significant journey time delays during the AM and PM peak hours. It is estimated that travelling from the A55 J7 at Gaerwen to Britannia Bridge Eastbound takes less than 10 minutes at off-peak times. However, on the busiest days during the AM peak (08:00-10:00 hours), this journey may take up to 35 minutes²⁰.
- 4.10 Conversely, journey times for travelling from A55 J10 in Bangor to Britannia Bridge Westbound are affected by congestion during the PM peak (15:00-17:00 hours). While at off peak the journey time for this part of the route is 5 minutes, during the PM peak it increases up to 15 minutes²¹.

Figure 4-3: Typical Traffic during weekday AM peak (08:00-09:00 hours) on both bridges²²



²⁰ Traffic Wales, A55 Britannia Bridge Journey Planning. 2023

²¹ Ibid.

²² Google Maps, 2023

Figure 4-4: Typical Traffic during weekday PM peak (16:00-17:00 hours) on both bridges²³



4.11 Furthermore, there is congestion on the A55 – Britannia Bridge and the main arterial route in Anglesey connecting the mainland with the Port of Holyhead during the summer period.²⁴ This is likely to have a negative impact on the number of tourists visiting the island.

4.12 As a result of congestion, rat running through local villages near the bridges leads to increased air pollution and noise vibration levels affecting the local residents.

Port traffic further affects the congestion levels

4.13 The Port of Holyhead is the second largest roll-on roll-off port in the UK (after Dover).²⁵ It is the main port for freight and sea passenger transport with the Irish Republic and as part of European Route E22, it provides a key connection in the “land bridge” from Ireland to the rest of Europe. It is still the fastest route despite an increase in the number of direct ferries from Rosslare to mainland Europe. Nearly 60% of goods carried on HGVs travelling between the Republic of Ireland and Europe pass through the Port of Holyhead. Furthermore, this port accounts for three quarters of passenger traffic between Wales and the Republic of Ireland.²⁶

4.14 Over the years, the tonnage of freight transported via this Port has been increasing, leading to an increase in the number of vehicles travelling to and from Anglesey to transport the goods.

²³ Google Maps, 2023

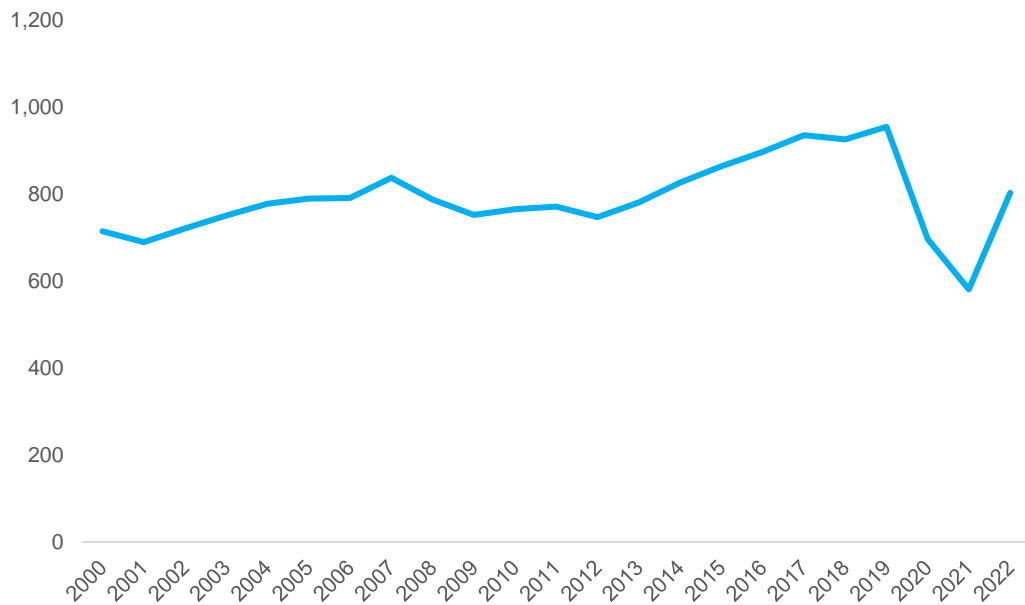
²⁴ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

²⁵ <https://www.itv.com/news/wales/2019-10-08/holyhead-the-uk-s-second-biggest-ferry-port-absolutely-not-ready-for-a-no-deal-brex>

²⁶ <https://www.gov.wales/sites/default/files/statistics-and-research/2021-12/sea-transport-2020.pdf>

Figure 4-5 shows that the annual port traffic (freight and passenger cars combined) at the Port of Holyhead has been on an upward trend, reaching 953,000 vehicles (all types) in 2019. Since 2019, the traffic numbers declined, which is mainly attributed to the Covid-19 pandemic and UK's exit from the European Union however, have recovered by 38% between 2021 and 2022.

Figure 4-5: Total units of port traffic (all types of vehicles) at the Port of Holyhead by year (thousands)²⁷



4.15 Port arrivals and departures are scheduled at various times throughout the day, however particularly for the morning peak there are a number of arrivals and departures which coincide with peak hours (Figure 4-6 below).

Figure 4-6: Port arrivals and departures on a typical day at the Port of Holyhead²⁸

Port arrivals and departures on 9th May 2023

Arrivals	04:09, 04:27, 07:14, 08:38, 08:57 , 10:05, 10:30, 12:33, 13:03, 13:08, 13:13, 13:16, 14:47, 16:35, 17:02 , 22:48, 23:00
Departures	01:11; 01:34, 07:05, 07:56, 07:59 , 09:29, 11:17, 12:58, 13:07, 13:44, 15:39, 19:37, 19:40

The congestion has compounding effects

4.16 Overall, the congestion across the two bridges creates rat running through communities, which has negative environmental, economic and social impacts:

- Increased air and noise pollution – particularly Lon Refail in Llanfairpwllgwyngyll, which runs alongside the A55 between J8 and J8a has **increased air pollution, noise and vibration levels for local residents.**

²⁷ DfT, Table PORT0301

²⁸ Port of Holyhead Authority

- The A55(T) bypass at Llanfairpwllgwyngyll was built in the early 1980s and has been a regular NO₂ diffusion tube monitoring location for more than 10 years. The IACC's Air Quality 2015 Updating and Screening Assessment identified that the kerbside of the A55(T) at Llanfairpwllgwyngyll is the only location which has had past exceedances of the Welsh Assembly Government's annual objective of 40µg/m³ for this pollutant.²⁹
- Impact on tourism and business development due to journey time delays.
- Impact on the freight and passengers at the Port of Holyhead as journey times to and from the Port increase.
- Impact on emergency services access since the closest A&E is on the mainland with both staff and patients unable to access Ysbyty Gwynedd..
- Poor resilience for all vehicles including public transport, thus disincentivising the use of busses, which can only cross on the Britannia Bridge due to weight restrictions.
- Impact on education due to school and staff unable to access schools and especially Ysgol David Hughes, MB Primary and Ysgol Llanfairpwll.
- Road safety concerns outside schools due to lack of alternative routes and rat running of HGVs.

Bus, rail and cycling access

4.17 Bus services on Anglesey are infrequent and have limited operating hours. Rail services are unlikely to make a significant impact. In a 30-min travel window, commuters are unable to travel far on a bus or a cycle compared to a private vehicle, which means they are likely to only use a bus or cycle for commuting from areas such as Menai Bridge to Bangor (close to the bridges on the mainland). Overall, the limitations of public and active modes of transport leave private vehicles as the choice of mode of travel.

Buses are a poor alternative to private car

4.18 A 30-minute travel on the bus during the morning peak (08:30-09:00) covers significantly less ground when compared to a private vehicle. We have used commuting patterns from Amlwch (Figure 4-7), Holyhead (Figure 4-8), Llangefni (Figure 4-9) and Menai Bridge (Figure 4-10), all of which are urban locations to demonstrate this point:

²⁹ <https://www.anglesey.gov.wales/documents/Docs-en/Environmental-health/Pollution/Updating-and-Screening-Assessment-2015.pdf>

Figure 4-7: Driving vs bus from Amlwch

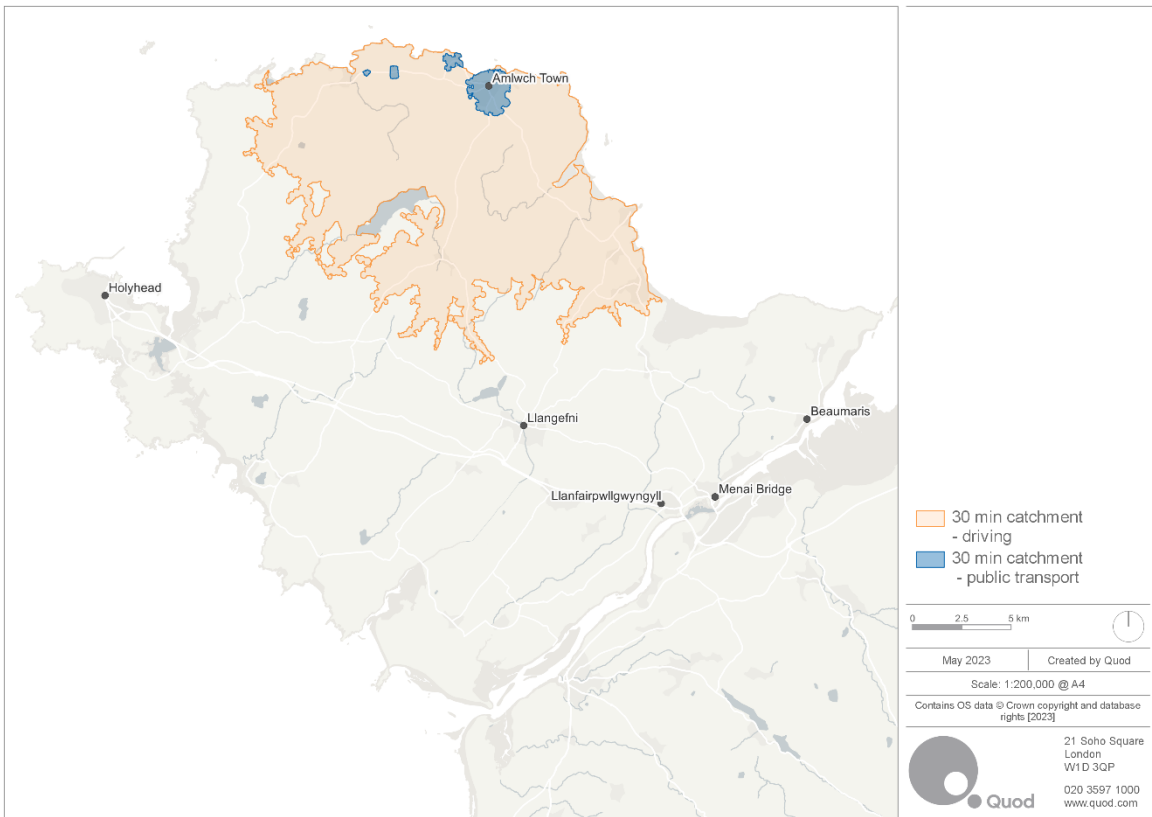


Figure 4-8: Driving vs bus from Holyhead

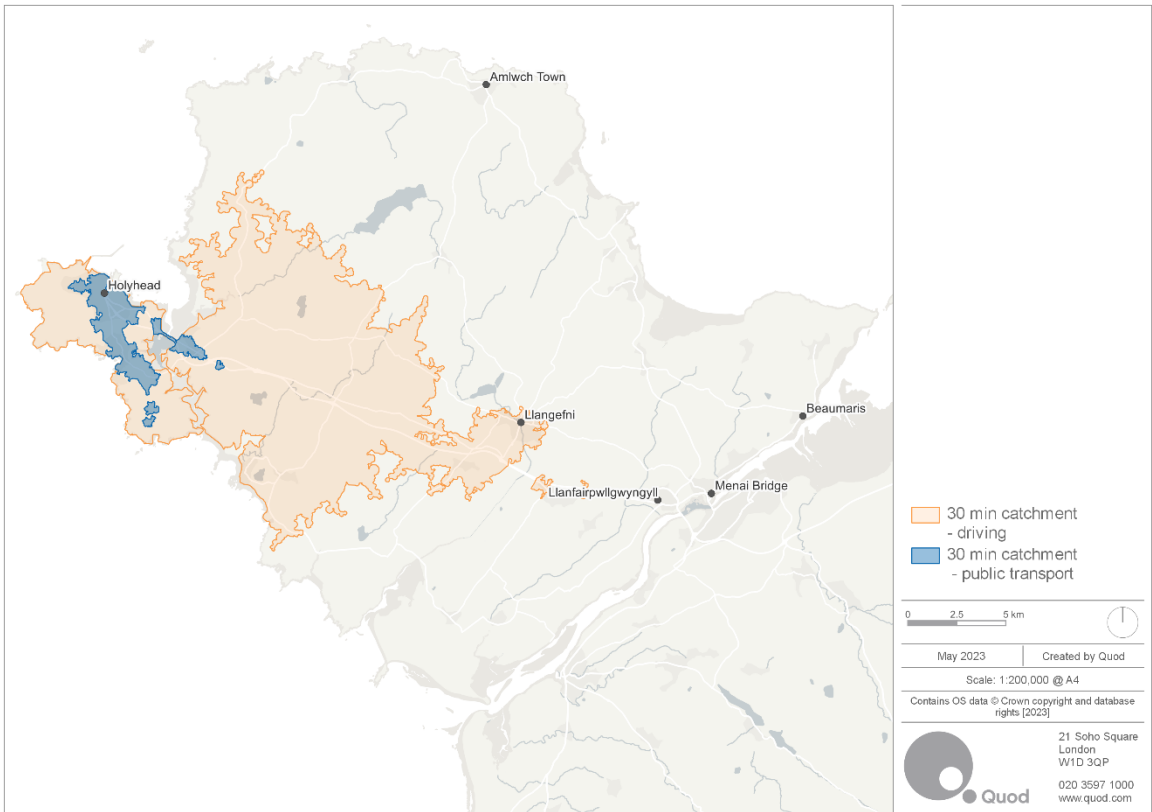


Figure 4-9: Driving vs bus from Llangefni

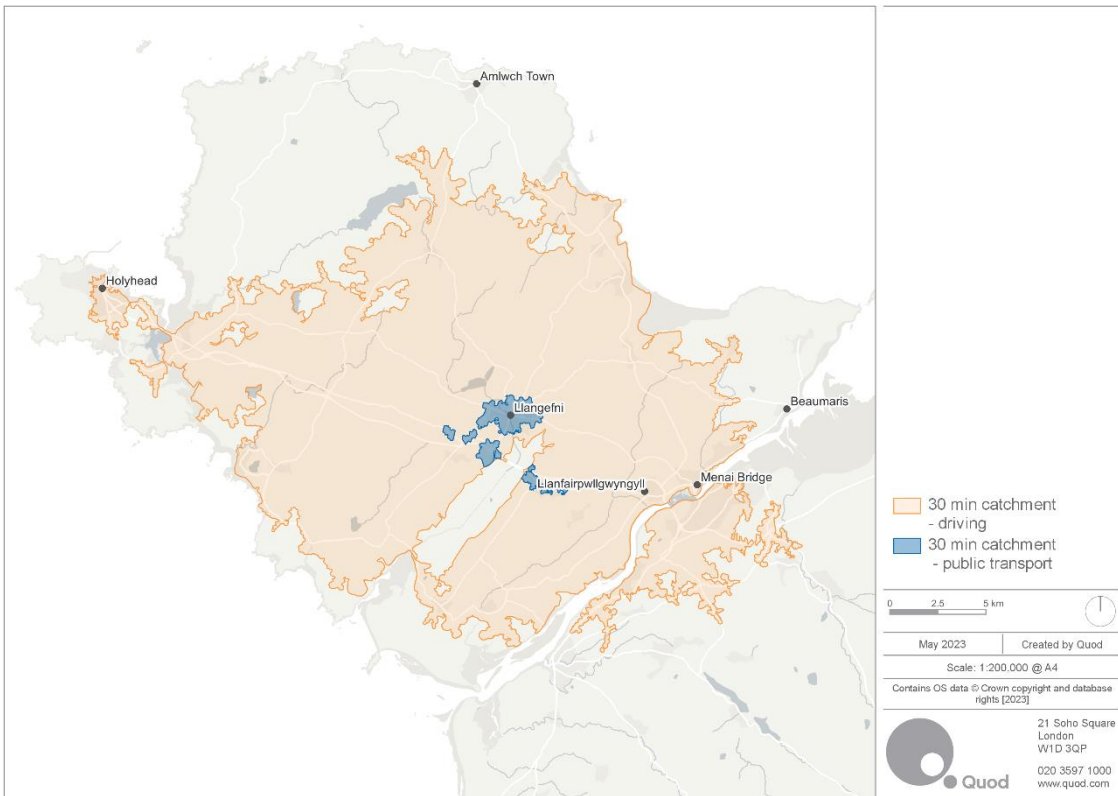
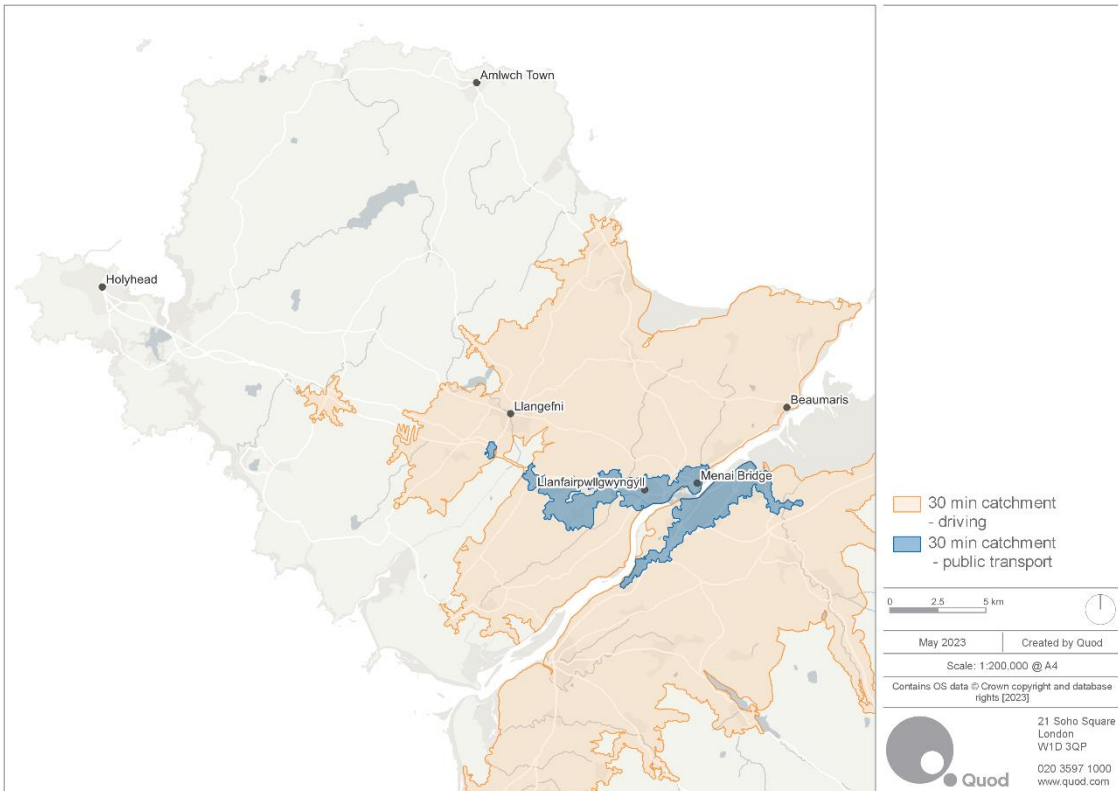
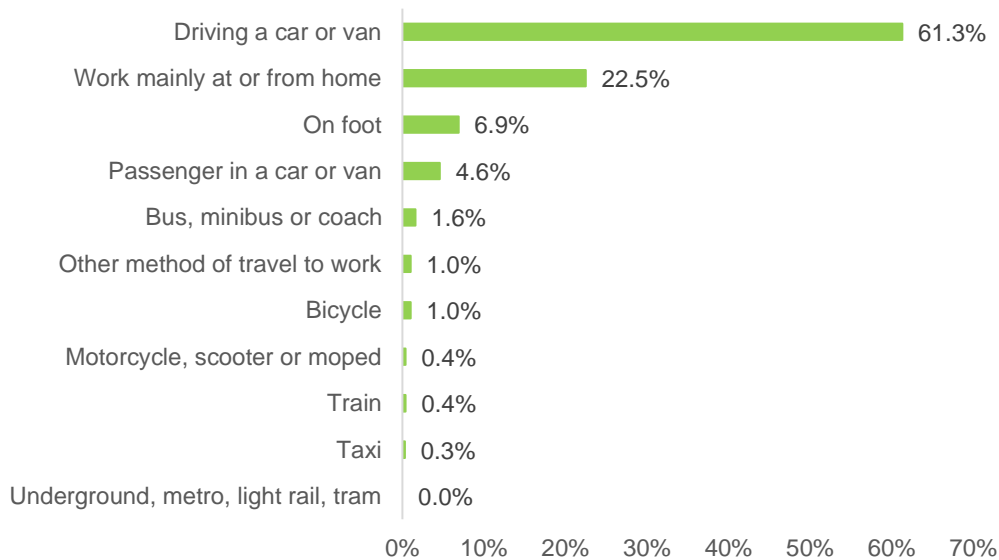


Figure 4-10: Driving vs bus from Menai Bridge



- 4.19 Anglesey has one of the worst accesses to public transport services in North Wales with infrequent services and limited operating hours.³⁰
- 4.20 There is limited bus service provision wholly under contract, with the Isle of Anglesey County Council operating between Anglesey and Gwynedd (Lines: 42 – Llangefni – Bangor; and 63 – Llannerch-y-meddnumber – Bangor).
- 4.21 Buses in Anglesey and Gwynedd are expensive. An adult day ticket costs £6 and concession tickets cost £4³¹. In comparison, an adult day ticket in Cardiff costs £4 and concession tickets are £3³². The high cost coupled with limited provision of services across the bridge means that private car remains the most convenient choice.
- 4.22 In order to keep the bus network operational, the lines crossing the bridges are heavily subsidised by the IACC with £614,385 annually for services from Anglesey to Gwynedd. Still, the ridership remains low. In the financial year 22-23 service 42 carried 35,740 passengers and service 63 carried only 10,448 passengers. This equates to an average of 137 daily (working day) passengers on route 42 and only 40 daily passengers on route 63³³. Combined, the two lines carry less than 2% of commuters travelling to work across the bridge (to and from Anglesey) in total.
- 4.23 This is consistent with the data on modal share when travelling to work (Method of travel to work, Census 2021) – only 1.6% of working residents use buses to reach their workplace. While the data is affected by the changes in working patterns brought about by the Covid-19 pandemic, the modal share is broadly consistent with 2011 Census data, when just 2% of the working population used buses for their commute as shown in Figure 4-11 below.

Figure 4-11: Method of travel to work in Anglesey³⁴



³⁰ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>
³¹ <https://www.gwynedd.llyw.cymru/en/Residents/Parking-roads-and-travel/Travel-passes/1bws-Ticket.aspx>
³² Cardiff Bus, 2023
³³ Based on 260 working days in a year.
³⁴ Census 2021 – Office of National Statistics (ONS).

- 4.24 The working population driving for work is approximately 40 times the working population taking public transport for work. **Figure 4-11** above includes workers living off the island travelling to Anglesey for work. This means that on average, those workers are also reliant on private vehicles to commute into Anglesey and by association returning off the island.
- 4.25 Nearly 85% of Anglesey households own at least one car or van. This is considerably higher than the proportion for Wales as a whole (81%) and for England and Wales (77%).³⁵ **This further indicates that private car is the first choice of transportation means.**
- 4.26 The Welsh Government does have vision for buses, which is for “*a stable and coherent network of bus services that are fully integrated with other modes of public transport, that are reliable, affordable, flexible, easy to use, low carbon and that encourage more people to use the bus rather than their cars.*”³⁶
- 4.27 However, it is unclear when this vision will be put in place for Anglesey. It is also unclear how this vision assists businesses on the island, especially those reliant on the Port of Holyhead.
- 4.28 The hours of operation of the bus service also do not suit those working in Ysbyty Gwynedd (and other) hospitals, which is a significant employer for the island residents and those in the hospitality industry (a dominant industry on the island).
- 4.29 Overall, expensive, infrequent public transport leads to low ridership and manifests itself in the dominance of private vehicle as the main mode of transport. This further reinforces the need for a third crossing to improve the reliability of the road network for those travelling to work.

Rail is unlikely to make a significant impact

- 4.30 Transport for Wales (TfW) has launched the North Wales Metro Programme to make it easier and faster to travel across North Wales. The rail projects for Anglesey as part of this programme include³⁷:
- Local station / interchange enhancements between Bangor and Holyhead.
 - Rail frequency enhancement and electrification between Bangor and Holyhead.
 - New rail corridor extension between Gaerwen and Amlwch.
- 4.31 However, the timing and funding sources of these projects is still unclear. The new rail corridor extension between Gaerwyn and Amlwch is estimated to cost over £530 million but there is no indication of how this corridor will be funded.³⁸ Rail electrification across North Wales as part of this programme will be in three stages – Chester to Llandudno Junction, Llandudno Junction to Bangor and Bangor to Holyhead. The cost is expected to roughly double as the stages progress. This means rail improvements across the Menai Strait are unlikely for many years. Many Anglesey residents also do not live close to a train station and hence rely on private vehicles.

³⁵ Census 2021 – Office of National Statistics (ONS).

³⁶ National Transport Delivery Plan 2022 – 2027: <https://www.gov.wales/sites/default/files/consultations/2022-07/national-transport-delivery-plan-2022-to-2027.pdf>

³⁷ <https://tfw.wales/projects/metro/future-developments/north-wales>

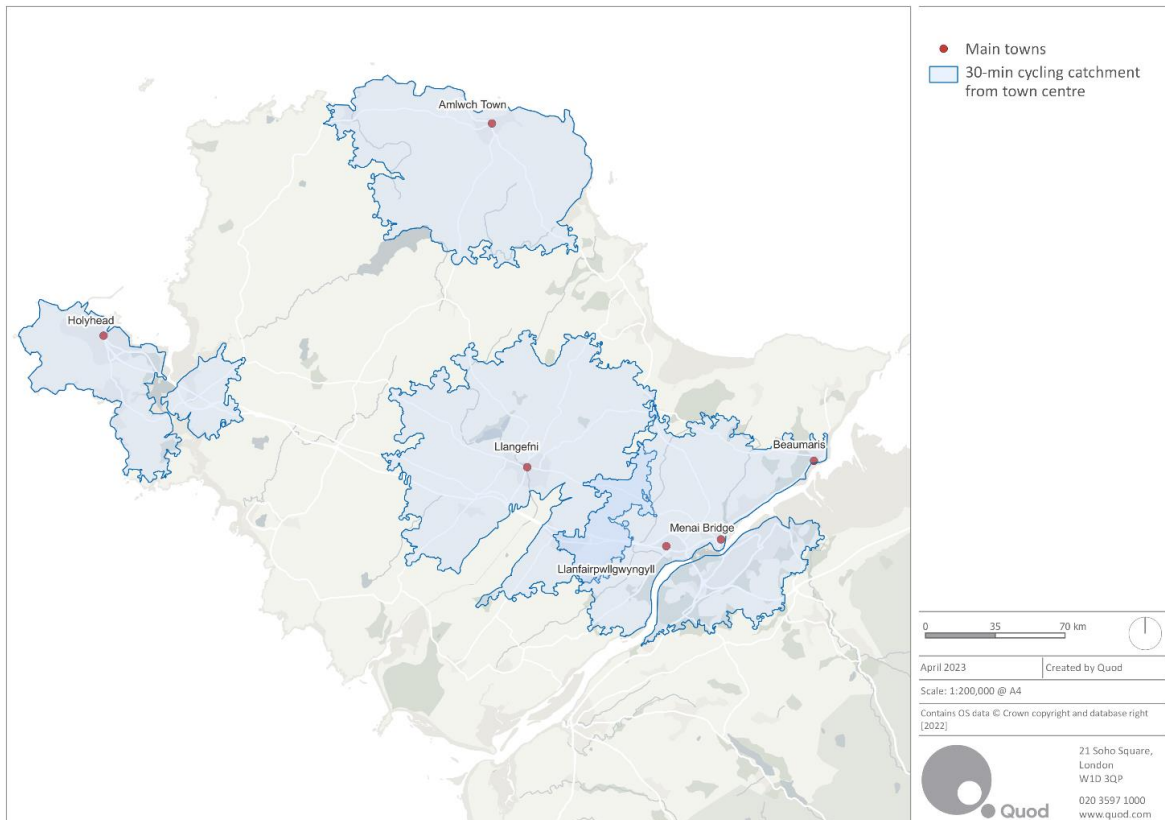
³⁸ https://www.gov.wales/sites/default/files/publications/2022-12/atn16848doc1_0.pdf p81

4.32 Additionally, the North Wales Transport Commission acknowledged that for many parts of North Anglesey, rail improvements will not make a significant impact. This further reinforces the reliance on private vehicles and emphasises the need for a Third Menai Crossing.

Cycling is also restrictive

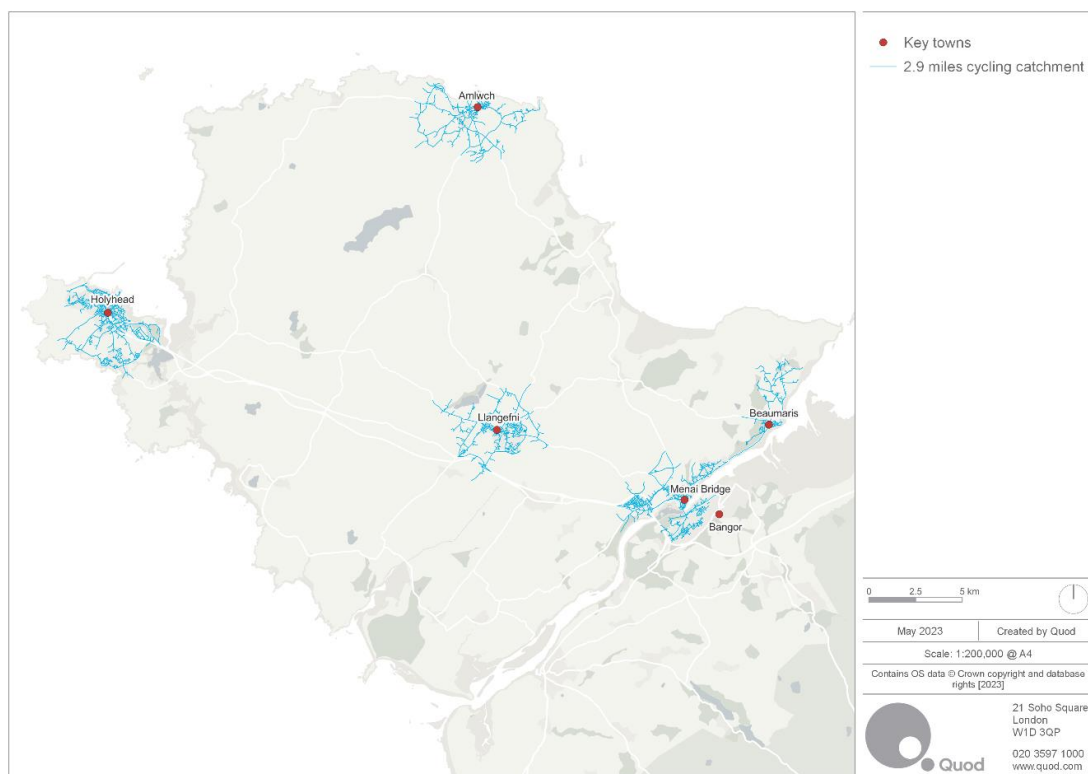
4.33 While cycling covers a greater distance than buses during the morning peak, it still does not cover as much as a private vehicle (as expected). This is shown in Figure 4-12 below.

Figure 4-12: 30 min cycling from main town centres



4.34 According to National Travel Survey, the average commute by bicycle is 2.9 miles. **Error! Reference source not found.** below demonstrates that such distance does not get commuters very far on Anglesey, where distances between towns and to the mainland are long.

Figure 4-13: 2.9 miles cycling catchment from the main Anglesey towns



4.35 There are also concerns about the safety of some cycling paths such as the path leading from Pentraeth Road to the Menai Suspension Bridge, which was constructed from a series of steps that have been flattened. The incline of the path is “lethal”, which could be a challenge for the elderly and young families.³⁹

Anglesey is necessarily reliant on private vehicles

4.36 The above sections shows that public and active modes of transport can only play a small role in commuter movement. As recognised in Topic Paper 15: Transport⁴⁰ as part of the evidence base for the Joint Local Development Plan for Anglesey and Gwynedd, the majority of public transport services are not able to compete with the private car in terms of reliability and journey times. It is not possible to provide public transport to all areas in Anglesey and Gwynedd that have poor or no accessibility due to geographic and financial constraints.

4.37 Private cars remain cheap to obtain and will become cheaper to operate with technological advances. The environmental impact of cars will also become much smaller with the transition to electric vehicles and phasing out of combustion engines by 2030.

4.38 While investing in public transport remains important, to become a competitive modal choice public transport would require even greater subsidies from the Council. For public transport to be an attractive alternative, there needs to be a regular provision at both the journey origin and destination. This is unlikely and unsustainable for a rural area. This leads to increased private

³⁹ <https://www.northwaleschronicle.co.uk/news/15752373.lethal-menai-bridge-cycle-route-worries/>

⁴⁰ <https://www.anglesey.gov.wales/documents/Docs-en/Planning/Planning-policy/Local/Supporting/Topic-Paper-15-Transport.pdf>

vehicle ownership and consequently a need for a reliable crossing across the Menai Strait to sustain the high reliance on private vehicles.

5 Doing nothing exacerbates the socio-economic challenges

The reduced ability to access the mainland creates a potential severance issue, separating the community from facilities and the workforce from employment. This in turn reduces the wellbeing for Anglesey residents and workers.

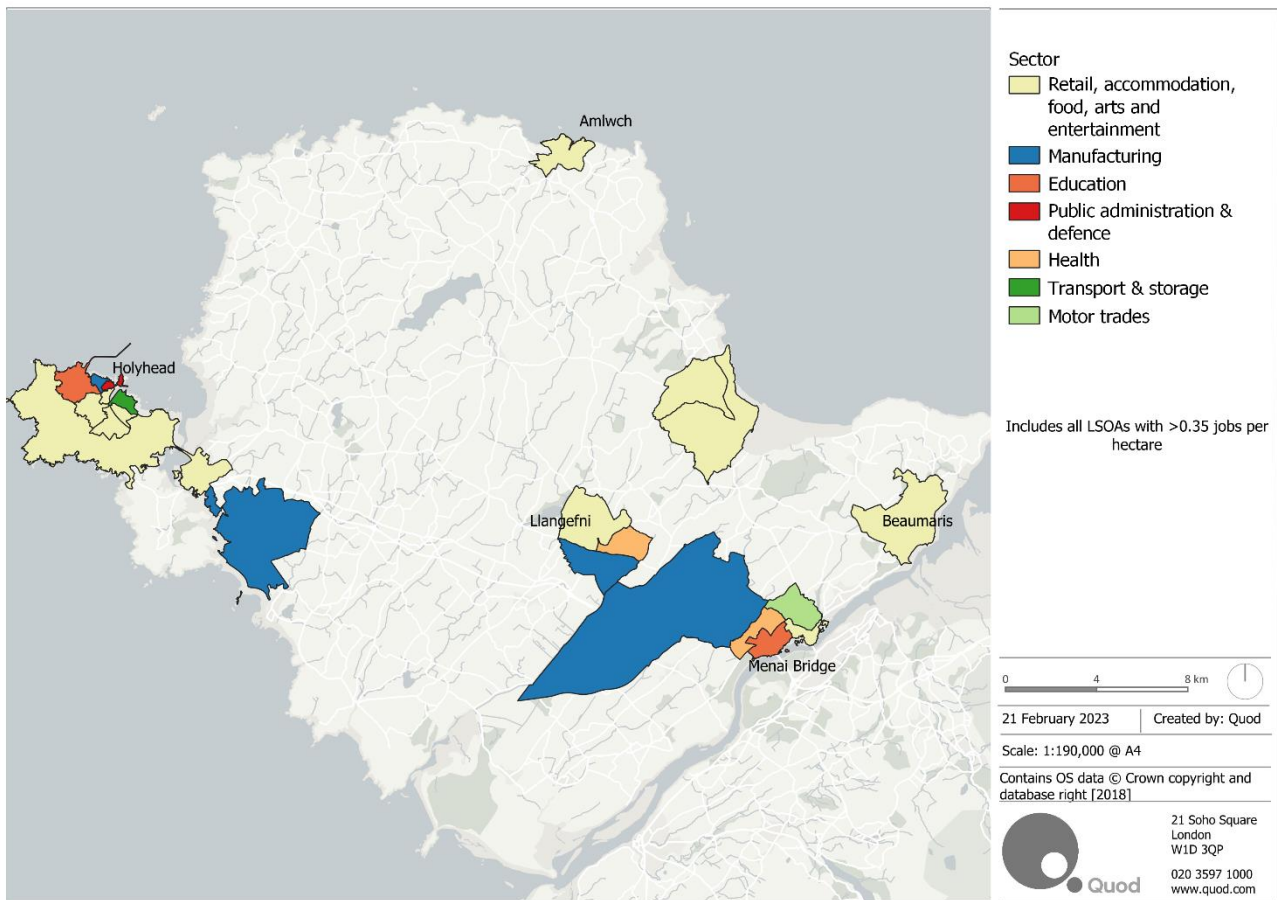
- 5.1 Not investing in a third Menai crossing is not to stay the same – the issues with the Menai Suspension Bridge, the restrictions to use of the Britannia Bridge (particularly to high sided vehicles and during high winds) and the frequent maintenance and closure of the bridges means that the **resilience and reliability of access to Anglesey is getting worse**.
- 5.2 Furthermore, the previous section showed that:
- traffic flow on the Britannia Bridge has increased,
 - there is congestion on or near both bridges during peak hours,
 - freight transported via the Port of Holyhead has increased corresponding to an increase in the number of vehicles needing to access the Port,
 - there is high out-commuting from Anglesey for work,
 - there is high reliance on private vehicles to commute around and off the island.
- 5.3 However, the implications of poor access to Anglesey extend beyond traffic related impacts. There are direct impacts on users (people and businesses) but also perceived impacts that mean, for example, businesses are less likely to locate on the island or tourists are less likely to visit.
- 5.4 The social and economic implications of doing nothing include:

Access issues cause people to leave the island for work. This means too few jobs remain with low job density around the island.

- 5.5 In Anglesey, the 23,000 jobs recorded in 2021 were less than 2% Wales's total employment numbers⁴¹.
- 5.6 Job density is low compared to Wales – only offering 32 jobs per square km, which is half the employment density of Wales. Employment in Anglesey is largely concentrated in the urban centres, such as Holyhead and Llangefni. **Figure 5-1** shows that retail, accommodation, foods, arts and entertainment are most prominent but some areas, closer to the mainland have pockets of manufacturing jobs.

⁴¹ BRES, 2023

Figure 5-1: Job density in Anglesey



5.7 Few jobs also means that economic activity remains low. The proportion of economically active population in Anglesey (51%) is lower than the Welsh average (54%) as shown in Table 5-1 below. This has decreased when compared to 2011 data, when 53% of Anglesey’s population was economically active⁴².

Table 5-1: Economic activity (residents aged 16+, Census 2021)

	Isle of Anglesey	Wales
Economically active: In employment	51%	54%
Economically active: Unemployed	3%	3%
Economically inactive	46%	44%

5.8 The low number of jobs in Anglesey is due to its long history of repeated shocks, which have resulted in over 2,300 job losses over the last 20 years, equivalent to 10% of current employment. This includes companies and sectors with a long history, in some cases over half a century, of operating within the Anglesey community:

⁴² Census 2011 and 2021 - Office of National Statistics (ONS).

- The construction of Wylfa nuclear power station began in the 1960s and the plant was decommissioned in 2015, resulting in the loss of over 300 jobs. The halting of work on Wylfa Newydd was a further blow to the Anglesey economy.
- Anglesey Aluminium began producing aluminium in Anglesey in the early 1970s – it operated for almost 40 years before closing in 2009 resulting in the loss of over 300 jobs.
- The Octel site in Amlwch was first selected in 1949 to extract bromine from sea water plant and production began in 1953. The site operated until 2004 when over 100 jobs were lost.

5.9 **Error! Reference source not found.** summarises all known job losses as a result of closures since 2004.

Table 5-2: Job losses in Anglesey due to closures since 2004⁴³

Year	Company	Jobs Lost
2004	Octel	100 to 120
2008	Peboc	60
2008	Eaton Electrical	265
2009	Anglesey Aluminium	300 to 400
2013	Welsh Country Foods	300 to 350
2015	Wylfa	300 to 350
2019	Rehau	100
2019	Marco Cable Management	40
2022	Orthios	120
2023	2-Sisters	730
TOTAL		2,315 to 2,535

Access issues means high-value businesses move off the island or new businesses that would have located on Anglesey choose not to, which impacts productivity and leaves lower paying jobs on the island. Energy Island Programme projects become harder to deliver and / or create more negative effects for the economy.

5.10 The loss of employment described above were in high-value energy and manufacturing industries, which the proposed Energy Island Programme (including development at Wylfa) will help recover. After the announcement to close the 2-Sisters factory in Anglesey in January 2023, production was moved to Chester partly due to the high transportation cost of accessing Anglesey.

5.11 A recent Employment Land Review (ELR) by Quod revealed that there is office demand from businesses in established areas all along the A55 from Chester to Conwy in North Wales, but not further. This is likely to be driven by the difficulty of accessing Anglesey and the high transportation cost of getting to the island.

⁴³ Isle of Anglesey County Council

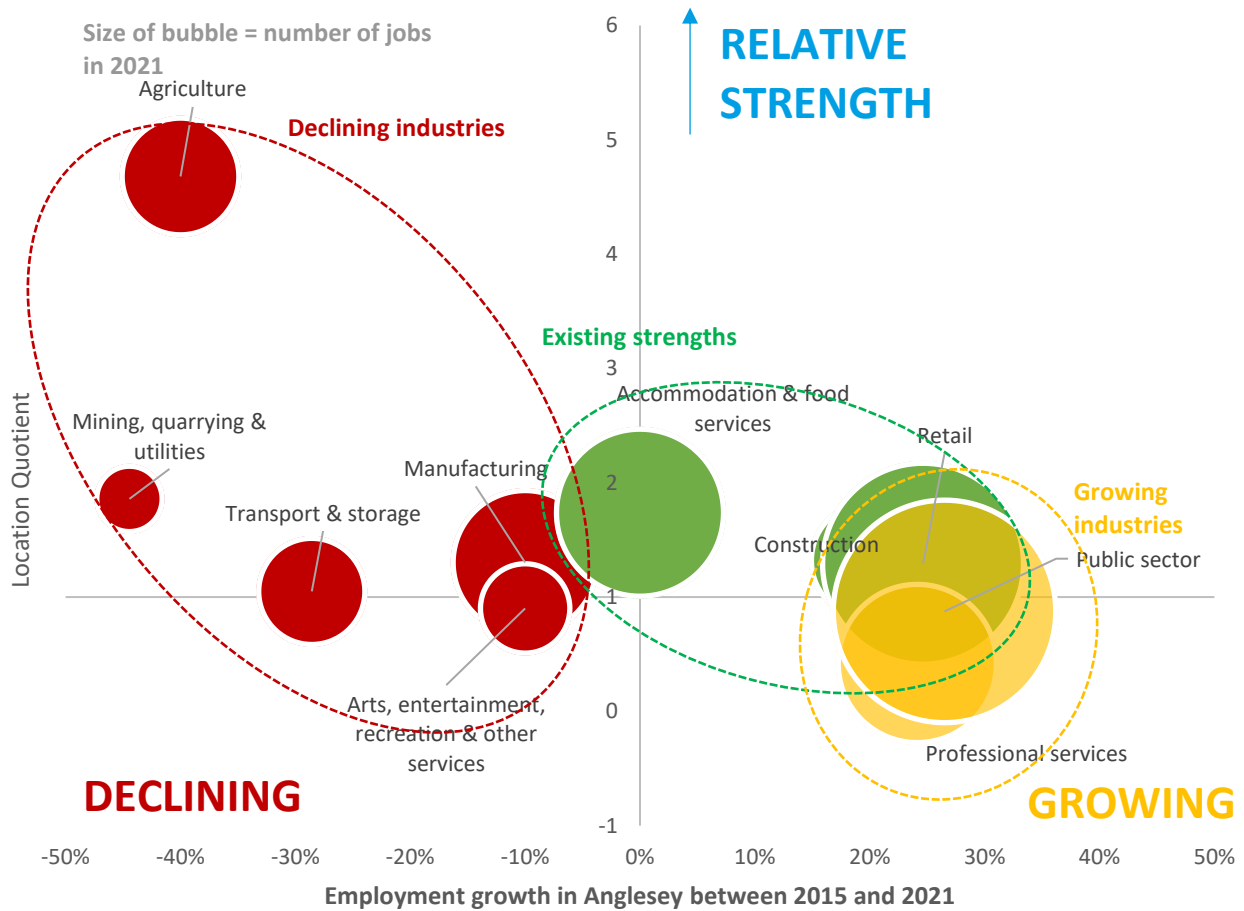
- 5.12 Parc Menai in Bangor has seen opportunities for employment such as the development of the Coleg Menai Bangor Campus⁴⁴ and a new business support centre.⁴⁵ While Parc Menai is close to the Britannia Bridge on the mainland, businesses have not gone past the bridge into Anglesey in part due to Anglesey's peripherality and the lack of reliability and resilience in accessing the island.
- 5.13 Currently, the Anglesey economy is reliant on the foundational economy.⁴⁶ The largest sector is wholesale and retail trade accounting for 17% of Anglesey's employment (higher than the Welsh average of 15%), followed by the accommodation and food service activities (14%) and human health and social work activities (12%).
- 5.14 There has also been a clear shift in industry dominance over the past few years towards the retail and accommodation and food services sector as shown in Figure 5-2 below:

⁴⁴ <https://www.gllm.ac.uk/news/work-commences-on-20-million-t%C5%B7-menai-transformation>

⁴⁵ <https://www.northwaleschronicle.co.uk/news/19135472.parc-menai-college-business-support-centre-contract-won-anglesey-based-construction-firm/>

⁴⁶ The services and products in the foundational economy provide those basic goods and services on which every citizen relies to remain safe, sound and civilised. Care and health services, food, housing, energy, construction, tourism and retailers on the high street are all examples of the foundational economy. <https://businesswales.gov.wales/foundational-economy>

Figure 5-2: Anglesey employment by industry, relative to England and Wales⁴⁷



5.15 These largest sectors in Anglesey have some of the lowest median annual wages across Wales as shown in **Error! Reference source not found.** below.

Table 5-3: Median wages in Wales (compared to the dominant sector)

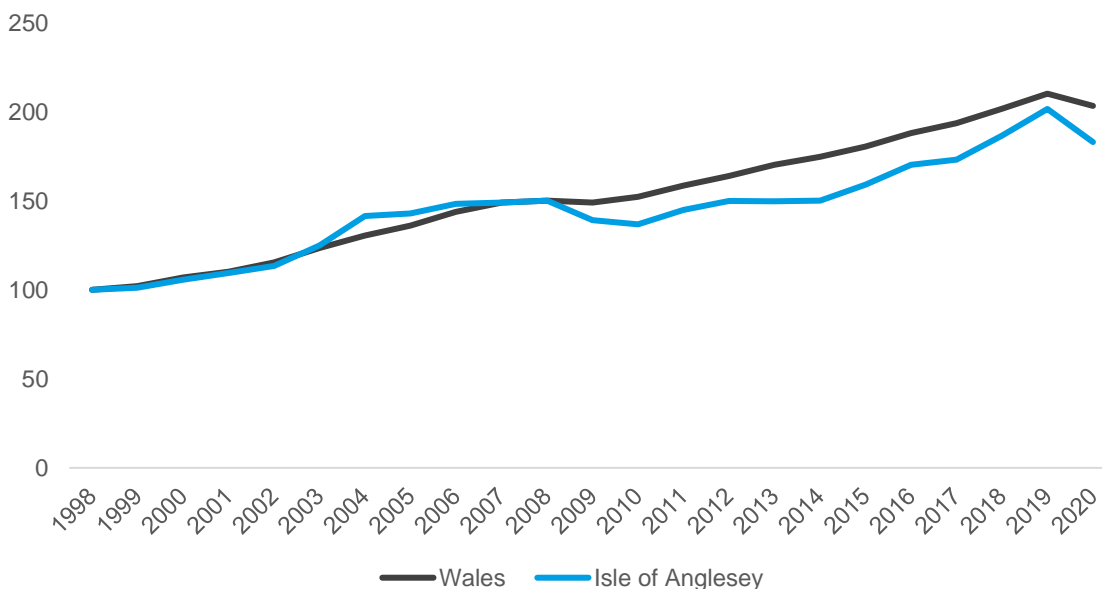
Industry	Anglesey Employment	Wales annual median pay (£)
Electricity, gas, steam and air conditioning supply	0%	£30,732
Mining and quarrying	0%	£42,206
Financial and insurance activities	0%	£26,820
Other service activities	2%	£20,308
Real estate activities	2%	£20,349
Information and communication	2%	£29,803
Water supply; sewerage, waste management and remediation activities	2%	£27,887
Arts, entertainment and recreation	2%	£16,946

⁴⁷ BRES, 2023

Professional, scientific and technical activities	3%	£24,560
Administrative and support service activities	4%	£19,986
Public administration and defence; compulsory social security	4%	£30,550
Transportation and storage	5%	£24,560
Construction	6%	£28,098
Agriculture, forestry and fishing	6%	£22,969
Education	8%	£25,459
Manufacturing	10%	£30,926
Human health and social work activities	12%	£22,327
Accommodation and food service activities	14%	£10,267
Wholesale and retail trade; repair of motor vehicles and motorcycles	17%	£17,907

5.16 The loss of major employers in high-value energy and manufacturing industries as mentioned above has been a key factor in impacting the productivity in Anglesey.

Figure 5-3: Anglesey's GVA growth relative to Wales (Indexed, 100=1998)⁴⁸



5.17 Figure 5-3 above shows that Anglesey's GVA grew at a higher rate than that of Wales up to 2004 after which it started declining due to the sequence of job losses described above in **Error! Reference source not found.** above and has since been lagging the growth rate of Wales.

5.18 Anglesey has the lowest level of GVA per head in Wales (£14,900⁴⁹), and the third lowest in the UK.

⁴⁸ Regional gross value added (balanced) per head and income components, 2022, ONS

⁴⁹ Ibid.

Recovery / growth at the Port of Holyhead is restricted if logistics firms seek more reliable routes for trade (including outside the UK).

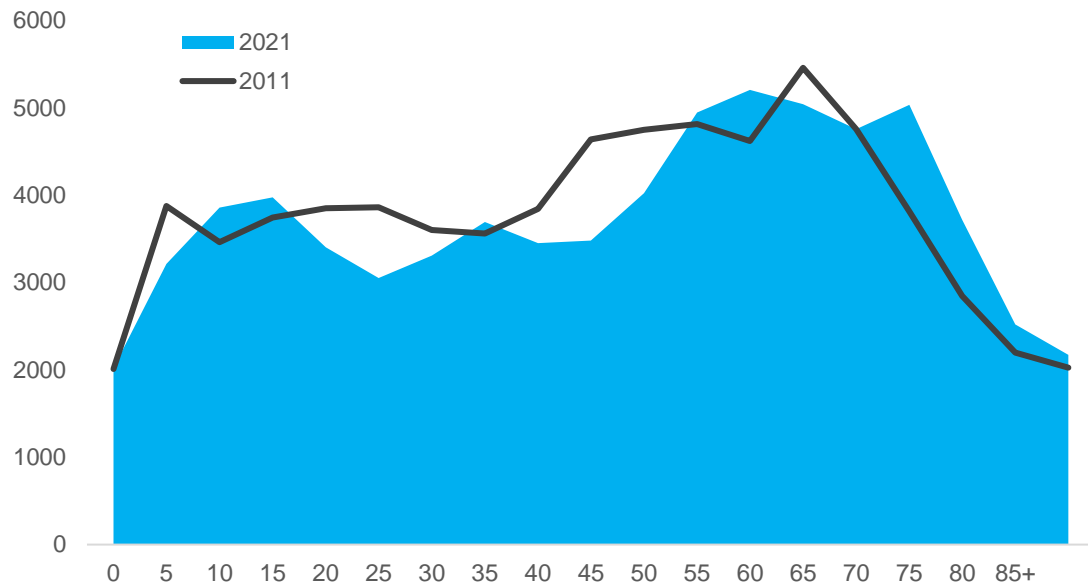
- 5.19 Section 4 above described the importance of the Port of Holyhead as the main port for freight and sea passenger transport with the Irish Republic, in particular accounting for nearly 60% of goods carried on HGVs travelling between the Republic of Ireland and Europe.
- 5.20 Freight from the Port of Holyhead is transported across the E22 as it is the fastest road route on the island. Delays from the two crossings puts this route in jeopardy and decreases demand for direct Ireland to Europe routes. The Port is one of Holyhead's major employers and Holyhead is the town most reliant for the port for jobs in all of Wales.
- 5.21 Low reliability of access to and from the Port of Holyhead means increasing amounts of trade are likely to bypass the UK altogether and take the longer, slower and more carbon intensive route for direct ferries from Ireland to mainland Europe.

Access issues cause out-migration, which has effects on community resilience, healthcare and the Welsh Language, particularly if generations of young people move out. People will also choose to commute off the island for higher paying jobs.

- 5.22 Figure 5-4 demonstrates the changes in the age profile of Anglesey. It shows that the area has an ageing population, seeing a 23.6% increase in people aged 70 years or above (from c. 2,700 to 3,400). The median age has also increased from 45 to 48 years between the two census years⁵⁰.
- 5.23 In addition to its ageing population, Anglesey's working-age population is declining. The number of people aged 35-49 years decreased by 17.2% (from c. 13,300 to 11,000).
- 5.24 The proportion of young adults (15-29 years old) also decreased by 13.7% (from 11,300 to 9,800).

⁵⁰ <https://www.ons.gov.uk/visualisations/censusareachanges/W06000001/>

Figure 5-4: Change in the population age profile of Anglesey between 2011 and 2021



5.25 Retaining the younger population in Anglesey will allow for knowledge sharing and culture between generations to help form a resilient and vibrant community. For the economy, retaining a younger population will help address skill gaps, talent development and succession planning.

5.26 The above effects pose risks and challenges for Anglesey community associated with:

- increased pressures on healthcare facilities
- a rise in the dependency ratio and the need for care
- reduction in the size of the labour market
- loss of Welsh culture and speakers of the Welsh language.

6 Policy and strategic alignment

- 6.1 A reliable and resilient connection across the Menai Strait strongly links to satisfying several national, regional and local policies. These policies focus on improving well-paid employment opportunities, retaining the Welsh culture and Welsh language speakers, and improving well-being.

Alignment with National Policy

Build Back Better

- 6.2 As part of the March 2021 Budget, the Government set out its plans to support economic growth through significant investment in infrastructure, skills and innovation in “Build Back Better: our plan for growth”, particularly to support the economic recovery from the Covid-19 pandemic.
- 6.3 The Build Back Better plan for growth focuses on three pillars of investment to act as the foundation on which to build the economic recovery and levelling up: (1) radical uplift in infrastructure investment (2) creating new skills training opportunities across the UK and (3) fostering the conditions to unleash innovation.

Alignment

- 6.4 **A reliable connection across the Menai Strait will give confidence for investment on Anglesey and the ability to move goods to the island for infrastructure projects, which in turn will provide high-value employment opportunities.**

Levelling Up

- 6.5 The Government published its Levelling Up White Paper in February 2022.
- 6.6 The White Paper has four aims. The most relevant for this scheme is:

“Boost productivity, pay, jobs and living standards, especially in those places where they are lagging.”

- 6.7 Beneath these aims are the Missions, which include:
- Living Standards: By 2030, pay, employment and productivity will have risen in every area of the UK, with each containing a globally competitive city, and the gap between the top performing and other areas closing.
 - Skills: By 2030, the number of people successfully completing high-quality skills training will have significantly increased in every area of the UK. In England, this will lead to 200,000 more people successfully completing high-quality skills training annually, driven by 80,000 more people completing courses in the lowest skilled areas.
 - Well-being: By 2030, well-being will have improved in every area of the UK, with the gap between top performing and other areas closing.

- 6.8 The White Paper sets out the Government’s framework for broadening opportunities for people across the country and is underpinned by a range of metrics which will track the progress of the 12 Levelling Up “Missions”.
- 6.9 In May 2022 the Government published the Levelling Up and Regeneration Bill which will give effect to some of the principles set out in the White Paper. Further updates to the bill were made in December 2022. The Missions will have status in law, including a statutory obligation to report annually on progress towards meeting them by 2030.
- 6.10 The Levelling Up Fund is a key element of how the Government intends to deliver its agenda. As part of the allocation process, the Government has grouped local authority areas into three categories of prioritisation. The Isle of Anglesey is the highest category two area in Wales – and the need to level up Anglesey was recognised by UK Government in the recent award of LUF round 2.

Alignment

- 6.11 **To fulfil the Levelling Up aims, a reliable connection between Anglesey and the mainland is important to ensure high-value employment opportunities such as M-Sparc, Anglesey Energy Island and the Anglesey Freeport can be set up on the island. This will also improve productivity and improve the overall well-being on the island.**

Union Connectivity Review⁵¹

- 6.12 The report states a focus point for better Union connectivity is “improving connectivity between North Wales and North West England on the A55, M53 and M56 roads...”.
- 6.13 It also states that “access to and from Holyhead by the A55 is an important consideration for freight connectivity to and from Northern Ireland.”

Alignment

- 6.14 **Given the importance of the Port of Holyhead, low reliability of access means logistics firms may seek access to other Welsh ports and any other ports outside the UK.**

Future Wales: The National Plan 2040⁵²

- 6.15 The Plan cites ‘A Changing Society’ as one of the Challenges and Opportunities faced by Wales from 2020 to 2040, stating that “*we also need to think about how we will retain and attract young people to all parts of Wales...*”.
- 6.16 Policy 1 in the plan is ‘Where Wales will grow’, stating that North Wales is a regional growth area. Specifically, Holyhead is mentioned as an area in North Wales for growth aspirations.
- 6.17 Policy 5 in the plan is ‘Supporting the rural economy’, stating that it is “*important that rural communities develop strong economies and support local enterprise*”.

⁵¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1036027/union-connectivity-review-final-report.pdf

⁵² <https://www.gov.wales/sites/default/files/publications/2021-02/future-wales-the-national-plan-2040.pdf>

Alignment

6.18 Low reliability of access between Anglesey and the mainland will make it more difficult to achieve the outcomes of the National Plan:

- The already high out-migration of the younger population will continue.
- Logistics firms may seek access to other Welsh ports or other ports outside the UK instead of the Port of Holyhead.
- The rurality and peripherality of Anglesey mean Anglesey is less connected to mainland Wales and the rest of the UK.

Welsh Government's Economic Action Plan: Prosperity for All⁵³

6.19 The plan has an objective to strengthen the foundation sectors in Wales – specifically tourism, food, retail and care.

6.20 It also mentions that supporting these sectors will help achieve the stated target of one million Welsh speakers by 2050.

Alignment

6.21 Given the Anglesey economy is now dominated by tourism, food and retail sectors, a reliable connection across the Menai Strait will help strengthen these sectors further. This in turn will provide career prospects in these sectors and help retain a greater Welsh speaking population on the island.

Wales Infrastructure Investment Strategy (2021)

6.22 The strategy aim is to improve economic wellbeing through:

- Increasing employment levels – in particular the need to ensure that ‘strategic investments in the commercial property sector will seek to address this limited supply, as well as maximising opportunities to attract and retain investment that would not otherwise come to, or reinvest in, Wales.’
- Improve business productivity – in part through ‘Investment in appropriately located, commercial property infrastructure will enable growth in business productivity.’
- Increase real household incomes.

Alignment

6.23 Anglesey has low employment compared to Wales and is dominant in lower wage sectors. Improving the ease of access across the Menai Strait will give confidence to investors and employers to create well-paid employment opportunities on the island, which in turn will improve real household incomes.

The Well-being of Future Generations Act (Wales) 2015

⁵³ <https://www.gov.wales/sites/default/files/publications/2019-02/prosperity-for-all-economic-action-plan.pdf>

6.24 The Well-being of Future Generations Act has seven goals. Those most relevant to this project are:

- A prosperous Wales: through encouragement of local employment and careful management of sustainability of the project itself
- A Wales of cohesive communities: through investment in local facilities to ensure community access to employment opportunities supporting attractive, safe, viable and well-connected communities.
- A Wales of vibrant culture and thriving Welsh language: through ensuring access to employment opportunities fit to retain Welsh speaking young people, reducing the effects of net outward migration.
- A more equal Wales: through improving access to work, participation, education and health.

Alignment

6.25 Low reliability of access to Anglesey means there is a decrease in the young working population on the island. Retaining the younger population is important for knowledge sharing and culture between generations to help form a resilient and vibrant community. This poses risks associated with a reduction in the size of the labour market and a loss of Welsh language speakers.

Alignment with Regional Policy

The North Wales Growth Deal

6.26 This policy adopts a vision for inclusive growth founded upon three key aims:

- Smart North Wales: focusing on innovation in high value economic sectors as a basis for enhancing economic performance.
- Resilient North Wales: focusing on retaining young people, increasing employment levels and skills to achieve inclusive growth.
- Connected North Wales: focusing on improving transport and digital infrastructure to enhance strategic connectivity within the region.

6.27 The aims are to be delivered by five programmes of interrelated projects. The most applicable programmes include:

- High value manufacturing
- Agri-food and tourism
- Low carbon energy

Alignment

6.28 High value manufacturing and low carbon energy projects will be infrastructure heavy. A reliable connection across the Menai Strait is required to ensure materials and labour can be transported easily.

- 6.29 **Given retail, food and tourism related sectors are now dominant in Anglesey, a reliable connection across the Menai Strait will make it easier for tourists to visit the island and that these sectors continue to strengthen.**

North Wales Regional Economic Framework⁵⁴

- 6.30 This framework has several priorities including “confidently promote and champion north Wales as a region with a wide range of economic activities...and provide an ambitious and attractive place to live, for skilled and well-paid employment and to encourage investment.”

Alignment

- 6.31 **Low reliability of access to Anglesey means there is low confidence in attracting investment to the island, which will limit the growth of well-paid employment opportunities and the working population.**
- 6.32 **This includes the Anglesey Energy Island projects which is expected to create significant employment opportunities for a diverse range of skills in due course as major developments move towards their construction and operation phases.**

Alignment with Local Policy

North Wales Joint Local Transport Plan (2015)⁵⁵

- 6.33 The Local Transport Plan (LTP) has been jointly produced by the six North Wales Local Authorities (Conwy, Denbighshire, Flintshire, Gwynedd, Anglesey and Wrexham).
- 6.34 The Vision for Transport in North Wales set out by the LTP is as follows: The North Wales Local Authorities aim to remove barriers to economic growth, prosperity and well-being by delivering safe, sustainable, affordable and effective transport networks.
- 6.35 The North Wales Ministerial Task Force has examined the issues for transport in North Wales and from a long list of 29 issues, five key issues have been identified:
- The ability of the strategic trunk road and rail corridors to provide the necessary good connectivity, for people and freight, within North Wales, to the ports and to the rest of the UK to support the economy and jobs, including tourism;
 - The lack of resilience of the road and rail networks to planned and unplanned events including extreme weather;
 - The need for good access to and between the three Enterprise Zones in North Wales;
 - The lack of viable and affordable alternatives to the car to access key employment sites and other services; and
 - The need for good road links to / from the trunk road network into the rural areas to help retain the viability of local businesses and support the Welsh language and culture.

⁵⁴ <https://www.gov.wales/sites/default/files/publications/2021-12/north-wales-regional-economic-framework.pdf>

⁵⁵ <https://www.flintshire.gov.uk/en/PDFFiles/Planning/LDP-evidence-base/Local/North-Wales-Joint-Local-Transport-Plan-2015.pdf>

- 6.36 The LTP identified the A55 corridor as being of key importance to the region as a catalyst for wider economic growth. Improving the A55 corridor to increase resilience was specifically identified as a key strategic high level transport intervention for action.
- 6.37 Furthermore, the LTP identified improvements to the Menai crossing as one of its key strategic high level transport interventions for action now or for inclusion in the next National Transport Plan.

Alignment

- 6.38 **Low reliability and poor resilience of the Menai Strait crossings obstructs the ability of the strategic road network to provide good connectivity, for residents, visitors and freight, which has negative impacts on the economy, including tourism and viability of local businesses.**
- 6.39 **Through reduced journey times, supporting economic development of the Isle of Anglesey, improving safety on the crossing for vehicles as well as pedestrians and cyclists, and increasing sustainable active transport through provision of segregated facilities, improvements / Third Menai Crossing will meet at least four strategic regional priorities of the LTP.**

The Anglesey and Gwynedd Joint Local Development Plan (JLDP)

- 6.40 This plan adopts the vision that “by 2026, Anglesey and Gwynedd will be recognized for their vibrant and lively communities that celebrate their unique culture, heritage and environment and for being places where people choose to live, work and visit”.
- 6.41 The JLDP will realise its vision through a series of strategic objectives that provide the context for Strategic Policies and Detailed Policies. Within ‘Theme 1: Support and create safe, healthy, distinctive and vibrant communities’, Strategic Objective SO4 sets out the need for strategic road links improvement:
- SO4: Maximise the opportunities of Holyhead as a major international gateway and the A55, E22 Trans European network route and the A5025, A487, A470 as key transportation corridors. One of the key outputs for this strategic objective is providing new roads or essential improvements to roads on the present road network.
- 6.42 Theme 3: Support growth and regeneration that will transform the local economy under the umbrella of Anglesey Energy Island Programme and other strategies and plans, building on those elements of its unique economic profile that are identified as being of regional and national significance.
- Theme 3 includes strategic objectives to support and capitalise on the development of Wylfa and associated development to maximise socio-economic opportunities for local business and sustainable employment opportunities for local people (SO9), diversify the Plan area’s rural economy, building on opportunities, offering local employment opportunities with good quality jobs that are suitable for the local community and respects environmental interests (SO12), manage the area as an alternative and sustainable destination for tourists (SO14).

- The key outputs of these objectives include more work opportunities locally in higher wage sectors, increased economic activity rates, infrastructure to support attractive and vibrant destinations for visitors and local people.

6.43 Topic Paper 15: Transport (2015)⁵⁶ identifies that for Rural Areas, the distinctive place characteristics including low population densities, the dispersion of job opportunities and the concentration of services in larger settlements restrict travel options. The car is important for accessibility in rural areas and is likely to remain so for the foreseeable future.

6.44 Section 6.7 of Topic Paper 1557 identifies that the majority of public transport services in Anglesey and Gwynedd are not able to compete with the private car in terms of journey times.

- In the peaks, many of the bus services are used to transport school pupils as local authorities have a duty under the 1985 Transport Act to make best use of existing bus services to serve educational establishments.
- It is not possible to provide public transport to all areas in Anglesey and Gwynedd that have poor or no accessibility due to geographic and financial constraints.

Alignment

6.45 **Low reliability of the strategic road network impacts negatively on the ability of the Port of Holyhead to be a major international gateway (transport corridor between Ireland and the UK / International Port).**

6.46 **The current situation of the Menai Strait crossings also means that there is low confidence in attracting jobs, businesses and infrastructure investment to Anglesey, which could be impacting on achieving the strategic objectives of the JLDP.**

The Anglesey Council Corporate Plan (2017-2022)

6.47 Objective 1 of the plan seeks 'to ensure that the people of Anglesey can thrive and realise their long-term potential'. In so doing, it commits to 'promote Anglesey, to:

- Encourage major developers to invest in the Island and use this as a catalyst for business development and jobs on the Island.
- Work with the other North Wales Councils to attract investment to ensure that key projects that offer local employment opportunities go ahead.

Alignment

6.48 **Low reliability of access across the Menai Strait means there is low confidence for investment on the island from major developers and other North Wales Councils. This will hinder the above objective of providing local employment.**

Anglesey Energy Island Programme

6.49 The Anglesey Energy Island Programme, established by IACC, is a collective effort between several stakeholders within the public, private and third sectors working in partnership, putting

⁵⁶ <https://www.anglesey.gov.wales/documents/Docs-en/Planning/Planning-policy/Local/Supporting/Topic-Paper-15-Transport.pdf>

⁵⁷ Ibid.

Anglesey at the forefront of low carbon energy research and development, production and servicing, and bringing with it potentially huge economic rewards.

6.50 Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.

6.51 Wylfa is well placed to contribute to the UK's future nuclear capacity. It is well placed to support the development of Small Modular Reactors (SMRs) or a gigawatts plant. Such investment would unlock significant benefits for North Anglesey, bringing forward as many as 1,000 well paid, secure jobs at the operational stage, as well as significant need for construction employment and supply chain effects. Any significant development at Wylfa would result in construction and supply chain benefits that could transform the economy of North Anglesey.

6.52 The Energy Island Programme is not just about Wylfa – there are additional opportunities:

- Hydrogen Hub at Parc Cybi in Holyhead, which will be the first development of its kind in Wales.
- Morlais – Anglesey Marine Energy, which is a tidal energy project brought forward by Menter Môn which aims to benefit local communities, the economy and help tackle climate change by using renewable energy to generate clean low carbon electricity. It is a significant opportunity for Anglesey to be a world-leader in the development, manufacturing and installation of tidal energy equipment. The project will have significant effects for Anglesey and Wales and will play a key role in delivering the Energy Island.

6.53 Benefits from these projects include:

- Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.
- Involvement of local SMEs in the supply chain activities of these projects.
- Programme and achieving the Net Zero commitments.

Alignment

6.54 **Each of the Anglesey Energy Island projects (and particularly Wylfa) is infrastructure heavy and will require reliable and resilient road network for the transport of materials and to serve the increased worker traffic during both the construction and operational phases.**

NDA Socio Economic Strategy (2020-2026)⁵⁸⁵⁹

6.55 After recognising the uncertainty around the status of the Wylfa Newydd project, the NDA has stated commitment to various projects as part of the North Anglesey Economic Regeneration Plan (NAERP):

⁵⁸

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/897130/NDA_local_social_and_economic_impact_strategy_2020_update.pdf

⁵⁹ <https://www.anglesey.gov.wales/documents/Docs-en/Business/Regeneration/North-Anglesey-Economic-Regeneration-Plan.pdf>

- Education, Skills and Employability – develop skills and work experience for local people and continue to invest in the engineering campus at Grŵp Llandrillo-Menai and broader opportunities for innovation and R&D through M-Sparc Cymru.
- Mynydd Parys – further development of the site as a tourist attraction and provision of linkages to and from it.
- Cemaes Harbour Area – pursue opportunities to improve the attractiveness and economic value of the area.

Alignment

- 6.56 **A reliable and resilient crossing is essential to ensure the local and younger generation are not deterred from accessing the island as a place to be educated, upskilled and employed. Similarly, resilience and reliability of the crossing are directly linked with increasing the attractiveness of the island to visitors.**

7 Anglesey's economic future

7.1 The projects mentioned below are planned on being delivered to improve the Anglesey economy. These projects are reliant on good access to the island in order to provide confidence for investment and the ability to move goods.

Anglesey Freeport designation promises more, and well-paid jobs

7.2 Following a successful joint bid by Stena Line and the IACC, Anglesey will now benefit from Freeport status where simplified customs and trade rules will apply, providing greater incentives for investment and trade. In future, goods entering and remaining within Anglesey Freeport will not be subject to the UK's usual tax and customs regime, supporting long-term business investment, and boosting the prosperity of Anglesey and North Wales.

7.3 It is expected that the Freeport could help create up to 13,000 high-skilled, well-paid jobs in North Wales over a 15-year period, increase local productivity and increase manufacturing output across North Wales. Freeport status would also provide a significant boost for the Energy Island Programme and support the path to Net Zero. It is estimated it would attract £800 million of investment.

7.4 Stena Line and IACC are actively engaging with local stakeholders (Bangor University, M-Sparc, the Institute of Export and International Trade, Grwp Llandrillo Menai) on plans to integrate delivery of the Freeport with existing local strategies, including those to upskill the local workforce.

7.5 Opportunities include accelerating the take up of sustainable, clean energy production by building on existing industry-leading net zero initiatives on Anglesey, such as offshore wind, nuclear, solar and tidal energy.

7.6 To make the most of the Freeport designation, and support the current volumes of the Ro-Ro freight at the Port of Holyhead (second in the UK after Dover), Anglesey requires a third crossing on the Menai Strait. Were the travel situation to remain the same, traffic congestion is expected to become worse, as more goods are projected to enter and leave Anglesey in the coming years.

M-SParc will drive innovation and attract more high-skilled jobs

7.7 Opened in 2018, M-Sparc is the first Welsh Science Park offering 31,200 square feet⁶⁰ of lettable offices, laboratory and workshop space for up to 700 people. It will drive economic growth through innovation and bringing high-value, high-skilled jobs to Anglesey, which are key to reduce the reliance on foundational economy.

7.8 The science park is located conveniently next to A55 J7 junction in Gaerwen village and the facility offers EV charging points. However, currently, during peak hours, there are significant

⁶⁰ <https://www.willmottdixon.co.uk/projects/m-sparc-menai-science-park>

delays on the Britannia and Menai Bridges which increase journey times for those commuting from off-the island to M-SParc.

7.9 A reliable, and convenient commute route is important for M-SParc to remain competitive and continue attracting talent and businesses from across North Wales.

Anglesey Energy Island

7.10 The Anglesey Energy Island Programme, established by IACC, is a collective effort between several stakeholders within the public, private and third sectors working in partnership, putting Anglesey at the forefront of low carbon energy research and development, production and servicing, and bringing with it potentially huge economic rewards.

7.11 Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.

7.12 Wylfa is well placed to contribute to the UK's future nuclear capacity. It is well placed to support the development of Small Modular Reactors (SMRs) or a gigawatts plant. Such investment would unlock significant benefits for North Anglesey, bringing forward as many as 1,000 well paid, secure jobs at the operational stage, as well as significant need for construction employment and supply chain effects. Any significant development at Wylfa would result in construction and supply chain benefits that could transform the economy of North Anglesey.

7.13 Wylfa is classified as one of the eight potential sites in the National Policy Statement for new nuclear power stations. Resilience across the Menai Strait is crucial in realising this policy.⁶¹

7.14 The Energy Island Programme is not just about Wylfa – there are additional opportunities:

- Hydrogen Hub at Parc Cybi in Holyhead, which will be the first development of its kind in Wales.
- Morlais – Anglesey Marine Energy, which is a tidal energy project brought forward by Menter Môn which aims to benefit local communities, the economy and help tackle climate change by using renewable energy to generate clean low carbon electricity. It is a significant opportunity for Anglesey to be a world-leader in the development, manufacturing and installation of tidal energy equipment. The project will have significant effects for Anglesey and Wales and will play a key role in delivering the Energy Island.
- Minesto's Holyhead Deep (the name deriving from the name of the large depression in the seabed west of Holyhead), is the world's first low-flow tidal stream project. The area matches all the site requirements by providing low-flow tidal velocities (1.5–2 m/s mean peak flow) at a depth of 80–100 metres. The offshore site is only 8 km from the port and town of Holyhead where Minesto UK head offices are located. The head office's presence has seen several full-time jobs created to date and the project is already stimulating businesses through supply chain. Minesto's long-term plan is to expand the Holyhead Deep site into a commercial tidal energy array with a total installed capacity of

⁶¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/47859/2009-nps-for-nuclear-volumel.pdf

up to 80MW, supplying local and clean energy to the equivalent of almost 70,000 households.⁶²

- Additionally, Anglesey is one of the most attractive locations for offshore wind development and also a potential attractive location for landing and servicing point for substantial future offshore investments in the Irish sea.

7.15 Benefits from these projects include:

- Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.
- Involvement of local SMEs in the supply chain activities of these projects.
- Local and clean energy supply.
- Programme and achieving the Net Zero commitments.

7.16 Each of the Anglesey Energy Island projects (and particularly Wylfa) is infrastructure heavy and will require reliable and resilient road network for the transport of materials and to serve the increased worker traffic during both the construction and operational phases.

Sustainable Tourism

7.17 The North Wales Transport Commission acknowledged that congestion is an issue for small towns, villages, countryside and coastal locations. With congestion during peak hours and holidays, and regular maintenance and closure of the bridges, congestion is likely to exist across Anglesey as a whole. This means tourists are less incentivised to visit Anglesey, which has a follow-on effect of lower spending in the retail, accommodation and food services sectors which are now dominant in Anglesey.⁶³ Similarly, poor resilience of the Menai Strait crossings means negative press, which could also lead to less visits to the island.

7.18 Resilience of the crossings is important because there is already demand for tourists to visit the island. Post Covid-19, there was a large influx of visitors, well over capacity of the road network, tourist attractions and waste management, despite a 53% increase in accommodation listings on the island between 2017 and 2021.⁶⁴ While there have been a large number of visitors, not improving the resilience of the crossings now means these visitor numbers will not be sustainable in the future.

7.19 As there is a capacity constraint on the number of people the island can accommodate at any one time, a more sustainable approach needs to be taken through:

- More equal distribution of tourists (and spending) across the island rather than entirely additional growth.
- Managing tourism to be ensure it is socially sustainable (including the behaviour of tourists).

⁶² <https://minesto.com/holyhead-deep/>

⁶³ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

⁶⁴ Draft Destination Management Plan 2023-2028 <https://www.anglesey.gov.wales/documents/Docs-en/Council/Consultations/2023/destination-management-plan-2023-to-2028/Destination-Management-Plan-DMP-2023-to-2028.pdf>

- Growth of green, environmentally sustainable tourism.

7.20 The draft Isle of Anglesey Destination Management Plan 2023-2028 sets out the vision for the visitor economy:

“We seek a visitor economy which is empathetic to the Island’s sense of place, and is seen to benefit the people, environment, culture, heritage and language, and continues to play a pivotal role in the economic stability of the island.”⁶⁵

7.21 The guiding principles and priorities of the Plan focus on:

- Celebrate, Respect and Protect our Communities, History, Language, Culture and Heritage – Anglesey’s visitor economy should build on existing strengths of language and culture and promote local heritage to a wider audience.
- Enhance the Visitor Experience Offer and Economic Sustainability – Anglesey’s visitor economy should grow sustainably based around a high-quality offer where visitors value and respect Anglesey’s culture, heritage and environment. Additionally, quality visitor infrastructure will enhance recreational opportunities leading to improved health and wellbeing.
- Maintain, Enhance and Respect our Environment, and plan to mitigate impacts of Climate Change – Anglesey’s visitor economy needs to become more ‘climate change ready’, increasingly carbon neutral. Tourism activities need to be in harmony with the natural environment.
- Ensure that the advantages to Anglesey communities outweigh any disadvantages, and as a result social and wellbeing benefits are seen – Anglesey’s visitor economy needs to benefit local communities, giving local people opportunities for new skilled roles and working with local supply chains.

7.22 The draft Destination Management Plan is currently at consultation stage. Following this stage, the first step to delivering the Plan will be establishment of a new partnership model for a Destination Management Organisation. Once this is established and supported with a Terms of Reference, the group will work in collaboration to define priority next steps with a SMART action plan.

7.23 Additionally, in 2022, IACC has secured three years ‘Sustainable Landscapes Sustainable Places’ funding (£575,000) from the Welsh Government to support running a number of environmental projects.

7.24 The projects will help enhance biodiversity and support the Council’s objectives to tackle climate change through four key themes, one of which focuses on ‘Delivering Sustainable Tourism’.

⁶⁵ Draft Destination Management Plan 2023-2028 <https://www.anglesey.gov.wales/documents/Docs-en/Council/Consultations/2023/destination-management-plan-2023-to-2028/Destination-Management-Plan-DMP-2023-to-2028.pdf>

Figure 7-1: Tourists on Holy Island, 2022⁶⁶



7.25 A third crossing is required to support the growth of sustainable tourism on Anglesey. Such route would relieve the pressure of the increased holiday traffic off the two existing bridges.

Town centre regeneration and investment in local infrastructure

Town centre regeneration

7.26 Investment in town centres is a key priority for both Isle of Anglesey County Council and the Welsh Government. The IACC is looking to support each Town Council on the island to support local leadership and make best use of available sources of funding (including Welsh Government funding) to improve their town centres.

7.27 The draft Town Centre Investment Framework sets out the overall strategy for how IACC wants to take advantage of new funding opportunities and support the Anglesey towns to be vibrant and successful places that are the focal points of the island's social, economic and cultural activity.

7.28 The draft Town Centre Investment Plans for the five main Anglesey towns (Holyhead, Amlwch, Llangefni, Menai Bridge, Beaumaris) assess the key challenges and opportunities of each town and set out the key investment priorities (aligned with the Placemaking Wales Charter⁶⁷) for supporting the success of the town centre.

⁶⁶ North Wales Chronicle: <https://www.northwaleschronicle.co.uk/news/23487712.anglesey-draft-plan-highlights-challenges-managing-tourism/>

⁶⁷ Placemaking Wales Charter (2020), http://dcfw.org/wp-content/uploads/2020/09/PlacemakingWales_A4Charter_ENG.jpg

Levelling Up Funding

- 7.29 In January 2023, the UK Government announced that the Council's "Holyhead: A culture and heritage driven transformation" bid for Round 2 of the Levelling Up Fund has been successful. It will help to transform the town by securing £22.5m of investment, including £17 million from the Levelling Up Fund, and deliver more than £54m in benefits to the local community.⁶⁸
- 7.30 Isle of Anglesey County Council worked in partnership with Holyhead Town Council, Môn CF, Ucheldre Arts Centre and the Church in Wales to understand the area's needs and present a package of interventions in and around Holyhead. The town has some of the worst deprived neighbourhoods in Wales and the Levelling Up Funding will see key local assets enhanced to make the area a better place to live and visit.

Investment in local infrastructure

- 7.31 Investment in local infrastructure is needed to support the jobs and local communities of Anglesey. Maximising the benefits of the Energy Island Programme and the Freeport designation requires there to be employment space for SMEs to grow. Investment is critical, as there is a historic undersupply of high quality floorspace for SMEs, which is restricting economic growth across the island.
- 7.32 Building on a IACC's successful Sites and Premises Programme, a Strategic Outline Case was written to bring forward new business units in Amlwch to ensure businesses have the right space to set-up and/or grow. Based on evidence of market demand, further similar projects need to be undertaken to support the provision of employment floorspace in other Anglesey locations. Currently there are four IACC business units in Amlwch, which are all occupied and there are over 75 IACC units across Anglesey. IACC estimates that majority of the tenants are Anglesey residents implying demand for local businesses.
- 7.33 A third crossing is important for the successful regeneration and investment in Anglesey's town centres. A reliable route across the Menai Strait will improve the regular journeys for the residents, improve the perception of place for the visitors and increase the confidence of businesses to locate in Anglesey's town centres.**

⁶⁸ <https://www.anglesey.gov.wales/en/Business/Economic-development/Levelling-Up-Fund-LUF/Levelling-Up-Fund-Holyhead-bid.aspx>

8 Benefits of a third crossing

8.1 A Third Menai Crossing is not a typical road scheme – it is not (only) about traditional transport user benefits but also provides long term resilience for access between Anglesey and the mainland and enables economic growth. A typical transport appraisal would fail to capture the full economic, social and community benefits of the scheme. These include:

- Society benefits:
 - Social inclusion: improved connectivity and permeability will improve social inclusion by better connecting communities.
 - Physical fitness – segregated facility for pedestrians and cyclists will encourage more use of active modes across the Menai Strait, which will improve physical fitness. Currently, pedestrians banned from the Britannia Bridge.
 - Improved access to work, education, health and leisure activities.
- Environmental benefits:
 - Overall, less queuing traffic and idling means more efficient engine operation and fewer emissions. The IACC agrees that public transport will reduce emissions. However, given that bus ridership is low due to its infrequency and high expense, adding more buses instead of improving resilience of the crossing would lead to empty buses in operation and idling in traffic around the existing crossings. This provides a worse environmental outcome than improving the resilience of the crossing and traffic flow for all vehicles, especially private vehicles.
 - Since private vehicles are the current modal choice of transport, emissions will still be reduced through the uptake of electric vehicles. As the Welsh Government has stated in its Second All Wales Low Carbon Delivery Plan (2021-25), accelerating the uptake of electric vehicles is “one of the most important actions needed”.⁶⁹ Furthermore, a report by the Low Carbon Expert Steering Group for the Welsh Minister of Economy, Science and Transport on the uptake of Low Carbon Vehicles (LCV), which include electric vehicles stated that:

*“...the Group appreciates the growing interest in LCVs for rural areas, away from strategic routes, where alternatives to the car are more restricted, with walking or cycling less likely to be a commuting option and public transport more limited.”*⁷⁰

Anglesey is rural with only one strategic route (A55/E22) running through the island. A more reliable and resilient crossing will help in substituting local private petrol and diesel vehicles for electric vehicles. Emissions will reduce and the crossing will contribute towards the Welsh Government’s vision of electric vehicle uptake.
 - The segregated facility for pedestrians and cyclists will encourage the use of active modes of transport, which in turn will reduce emissions. While private vehicles are

⁶⁹ <https://www.gov.wales/sites/default/files/publications/2021-10/net-zero-wales-carbon-budget-2-2021-25.pdf>

⁷⁰ <https://www.gov.wales/sites/default/files/publications/2019-05/low-carbon-vehicle-steering-group-final-report.pdf>

still dominant, increased uptake of active modes of transport is still beneficial for the environment.

- Benefits to the economy:
 - Visitor economy – the number of visitors travelling to Anglesey has increased in recent years and it is one of the largest employment sectors. The third crossing will ensure that visitor numbers can remain high (as the resilience of the road network will improve) and the popularity of the island as a sustainable visitor destination remains.
 - Connecting communities and commodities – the Port of Holyhead is the second busiest roll-on roll-off port in the UK (after Dover) and is a critical part of the “land bridge” between Ireland, the UK and mainland Europe. Reliability and resilience of this link is crucial to support growth and strategic importance of the area. Connectivity to Enterprise Zones will also be enhanced.
 - Reduced goods / services prices due to improved journey times.
 - Reduced transport / logistics costs.
 - Supporting employment opportunities through inward investment and land use development in North Wales. A more resilient and reliable crossing will help reduce out-commuting from Anglesey and increase travel to Anglesey due to job creation:
 - Freeport designation – Following a successful joint bid by Stena Line and the IACC, Anglesey will now benefit from Freeport status where simplified customs and trade rules will apply, providing greater incentives for investment and trade. In future, goods entering Anglesey Freeport will not be subject to the UK’s usual tax and customs regime, supporting long-term business investment, and boosting the prosperity of Anglesey. This could unlock up to 13,000 jobs on the island, which would be a mix of workers living on the island and workers commuting to the island for work.
 - Anglesey Energy Island Programme – Anglesey’s geography means it has a uniquely placed to delivery energy projects. This includes nuclear (gigawatt or SMR) at Wylfa but also hydrogen and tidal (Anglesey has the largest consented tidal scheme in the world). This is important not just to Anglesey and North Wales but the UK as a whole.
- Transport related benefits:
 - Improved journey times along the A55 during peak periods.
 - Improved journey time reliability.
 - Improved resilience of the network to events such as scheduled maintenance and emergencies such as accidents or the impacts of bad weather.
 - No negative road safety impacts are created as a result of the scheme while also improving the safety of the crossing through e.g. improved junction designs etc.
 - Segregated link for pedestrians and cyclists to improve accessibility and safety between the counties of the Isle of Anglesey and Gwynedd for active modes.
 - Improved emergency services response times.

Ynys Môn

THE ISLE OF Anglesey

Improving reliability and resilience
across the Menai Strait

Key Findings

June 2023



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1 Introduction

- 1.1 IACC welcomes the opportunity to be able to submit evidence to the North Wales Transport Commission (NWTC) on the need for an improved multi-modal crossing of the Menai Strait.
- 1.2 The existing Menai crossings are enormously constrained for local, regional, national and international traffic. The Britannia Bridge is the only point on the UK trunk road network hosting the Trans-European Road Network route E22, where the carriageway narrows from 4 lanes to two - one in each direction. This remains a critical asset as part of the UK “land bridge” enabling trade between Ireland and the EU and is key to the future viability of the Port of Holyhead. It is also a significant bottleneck to commuter and holiday traffic.
- 1.3 While congestion due to the existing Menai Strait crossings is an issue, the more important point to note is that the lack of resilience of the existing crossings has consequential effects on the community and workforce.
- 1.4 As the Commission’s January 2023 Progress Statement acknowledged, Anglesey is in a unique position, being peripheral and isolated at the north-west tip of Wales and in acting as the gateway to and from the EU through the Port of Holyhead.
- 1.5 As the Statement acknowledges, Anglesey, like much of North Wales is reliant on private vehicles.

There is a current lack of attractive or realistic sustainable transport alternatives to the private vehicle for journeys by residents, workers, and visitors in North Wales. This is contributing towards dependency on private vehicles and limiting social, economic and cultural connections.

- 1.6 For Anglesey, the situation is even worse. The congestion and lack of resilience for the Menai crossings is severely limiting social, economic and cultural connections to the rest of the country. Furthermore, it is hampering the island’s ability to attract the businesses and the economic activity it requires to reduce a cycle of job losses, lower on-island employment and increasing reliance on off-island jobs.
- 1.7 The decision of the Welsh Government, as recommended by the Roads Review Panel, to cancel the proposed Third Menai Crossing will greatly exacerbate the challenges faced by the island’s economy and communities, and hinder the successful implementation of key policies that seek to rebuild its employment base and reduce the need of its residents to leave the island to work.
- 1.8 The council was very disappointed at the outcome of the Roads Review as we feel it failed to acknowledge the particular circumstances of the island and the problems caused by the existing crossings.

1.9 There are significant problems with both bridges as shown in Table 1-1 below.

Table 1-1: Issues with the Menai Suspension Bridge and the Britannia Bridge

Menai Suspension Bridge	Britannia Bridge
<p>Regular maintenance required due to the age of the bridge (nearly 200 years old), resulting in reduced capacity due to partial or full closure. Recently closed for 5 months between 21 Oct 2022 and 2 Feb 2023 with inspections required every six weeks to check these works.¹</p>	<p>More than 150 years old and has not had any major maintenance work for several years and is therefore vulnerable to closures due to wind, incidents and accidents.</p>
<p>Closures have impact on Emergency Services – the closest major hospital with a Trauma Unit is on the mainland.</p>	<p>Only single carriageway on the European Road Network Route E22 and acts as a significant bottleneck to commuter and holiday traffic. It is therefore more vulnerable to accidents compared to dual carriageways, especially on the approaches. Across Wales in 2022, there were over seven times as many accidents on single carriageways compared to dual carriageways.²</p>
<p>Unable to cycle or walk during high winds.</p>	<p>Only bridge available for wide, high and abnormal loads.</p>
<p>No safe and adequate cycling provision. Cycling prohibited from using the segregated footways of the bridge, resulting in safety concerns for cyclists and impacting on congestion for motorists.</p>	<p>Speed limits and restrictions to motorcycles, caravans and bicycles during high winds. No safe and adequate cycling provision. This bridge has had several publicly reported closures due to high winds as opposed to any other section of the A55 indicating that it is more vulnerable to wind effects.</p>
<p>Restrictions on the type of vehicles that can access this bridge (only up to 7.5 tonnes) and speed restrictions of 30mph impact the local bus service and freight movements between the mainland and the Port of Holyhead.</p>	<p>Pedestrians are prohibited from this bridge.</p>
<p>Lack of enhanced safety facilities, such as hard shoulders – poor resilience with regards to emergency vehicles.</p>	<p>During particularly high winds (gusts above 70mph) the bridge is fully closed – with no possible diversion route for vehicles over 7.5 tonnes, thus causing buses to be stuck in the same queues as other vehicles and preventing local bus services from running. Between 2017 and 2022, this bridge has been closed seven times.³ HGVs are re-directed to Parc Cybi in Holyhead to wait for restrictions to be lifted.⁴ However, there is insufficient capacity there which means HGVs park on residential streets,</p>

¹ <https://www.gov.wales/a5-menai-bridge-frequently-asked-questions#:~:text=What%20is%20happening%3F,the%20temporary%20work%20was%20completed.>

² <https://stats.wales.gov.wales/Catalogue/Transport/Roads/Road-Accidents/Accident-Level-Data>

³ <https://www.thebangoraye.com/menai-suspension-bridge-closure-your-questions-answered/>

⁴ <https://traffic.wales/a55-britannia-bridge-high-winds>

which leads to safety, welfare and infrastructure damage.

HGVs on the mainland travelling to Anglesey are advised to stop and pull over in a safe location along the A55, which can prove unsafe due to a lack of facilities. Parc Bryn Cegin has also been used in the past when required.⁵ This is an empty multi-million-pound industrial park looking to attract businesses. HGVs being pulled over into this park means that industrial space gets occupied without generating employment and boosting the local economy.

Safety concerns: Lack of central reservation and close proximity of junctions either side of Britannia Bridge to the merging sections from two to one lane increasing the risk of collisions. Since 2017, there have been 12 serious accidents and two fatal accidents. These have required the closure of the bridge while recovery and investigation are undertaken.

- 1.10 The current congestion and periodic closure of both bridges cause misery, stress and loss of earning to the residents and business of Anglesey.
- 1.11 In the last 15 years, Anglesey has lost half of its major employers, including Anglesey Aluminium, Welsh Country Foods and Wylfa. Last month, 2-Sisters became the latest to close, leaving the island with only four businesses that employ more than 250 people. The closure of the 2-Sisters factory resulted in a loss of 730 jobs, equating to over 3% of the island's workforce. The island's peripherality and poor transport links are a key factor, with 2-Sisters moving their operation to Chester from where they can better serve their customer base.
- 1.12 The real lack of resilience, and the risk of future closures, is magnified in terms of the perceived lack of resilience in the minds of potential investors and visitors. Discussions with businesses have highlighted that difficulties crossing to and from the island cause many to seek to invest on the mainland instead as it increases costs. For example, a sum of £40m was discussed with the UK government to keep the recently closed 2-Sisters factory open but even then the company could not guarantee that the facility would remain open in the medium-to-long term if such support was provided.⁶ Tourism is also severely impacted by the perceived risks, many who may otherwise have planned to visit the island are instead choosing to look at alternative destinations on the mainland. Following a recent tragic fatal crash on 23 May 2023⁷, the Britannia Bridge was closed to traffic in both directions for several hours causing several miles of queues, further reinforcing the negative image of the island's crossings.

⁵ <https://www.dailypost.co.uk/news/north-wales-news/what-happens-britannia-bridge-closes-25330542>

⁶ <https://www.northwaleschronicle.co.uk/news/23375240.2-sisters-close-anglesey-factory-month/>

⁷ <https://www.northwaleschronicle.co.uk/news/23541707.man-dies-early-morning-crash-near-britannia-bridge/>

- 1.13 This lack of confidence damages Anglesey's consistency, security and future, and makes it harder to attract investment to create jobs on the island, which further increases the reliance of our residents on being able to cross the bridges to get to jobs on the mainland. This results in a self-fulfilling cycle of misery.
- 1.14 The proposals to improve the Menai Crossings are not just about journey time savings. The issue is basic accessibility and connectivity to and from a remote island that remains one of the most important hubs for UK trade. Without this accessibility and connectivity, Anglesey will continue to struggle to attract the private sector investment it desperately needs. This also impacts emergency services access since the closest A&E is on the mainland, which could affect the risk to life in critical situations.
- 1.15 This document sets out the limitations of the existing crossings and how they affect the daily life of our residents and businesses. We note that the Commission's Terms of Reference include analysis of road journey patterns (including freight) through and within the region at different times of day and year, and how public transport and active travel are used. This submission from IACC directly addresses those issues and in particular how they relate to the resilience of the Menai Crossings.

2 Response to the Roads Review

Purpose of the Roads Review Panel

- 2.1 The objectives of the roads review were set out in September 2021⁸:
- 2.1.1 To ensure road investment is fully aligned to the delivery of; WTS ambitions and priorities, Welsh Government Programme for Government June 2021 (PfG) commitments and to the forthcoming second low carbon delivery plan: Net Zero Wales.
 - 2.1.2 To develop a set of criteria which identify appropriate circumstances in which expenditure of Welsh Government funds on roads should be undertaken, taking into account the above.
 - 2.1.3 To use these criteria to make recommendations on which of the current pipeline of road investment projects should be supported, be modified or have Welsh Government support withdrawn.
 - 2.1.4 To provide guidance for reallocating road space on parts of the road network which might in future benefit from enhancement spend.
 - 2.1.5 To consider how any savings might be allocated, in order to ensure problems on the road network are addressed and in particular make recommendations on how to tackle the backlog of road maintenance.
- 2.2 IACC has written to Ministers setting out the Council's disappointment with the outcome of the roads review. We believe there is a need for a cross government approach to this issue, extending beyond transport and climate change considerations. This needs to strike a balance between satisfying the social, economic, and environmental needs of Anglesey. North Wales and Wales as a whole.
- 2.3 We also believe that the outcome of the roads review is not fully reflective of some of the key objectives of the PfG⁹, namely:
- *“Build an economy based on the principles of fair work, sustainability and the industries and services of the future”* – planned projects such as the Anglesey Energy Island programme will focus on low carbon energy and generate high-value employment. A reliable connection between mainland Wales and Anglesey will assist transportation of labour and materials for development of such projects.
 - *“Push forward towards a million Welsh speakers, and enable our tourism, sports and arts industries to thrive”* – a reliable connection will help attract people to stay or relocate to Anglesey and increase the number of Welsh speakers on the island. Similarly, a reliable connection will attract visitors to the island and contribute to tourism, which is currently a dominant sector on the island.

⁸ <https://www.gov.wales/roads-review-panel/terms-reference>

⁹ <https://www.gov.wales/sites/default/files/publications/2021-06/programme-for-government-2021-to-2026-well-being-statement.pdf>

- *“Make our cities, towns and villages even better places in which to live and work”* – a reliable connection means people will not be deterred from accessing the island, which in turn will improve its attractiveness as a location for living and working.

2.4 As an Island, the A55 over Britannia Bridge and the A5 over Menai Bridge are integral parts of local, regional, and national infrastructure. They provide the only connection, resilience, and movement in terms of economy, employment, health, education, leisure, and tourism. The problems that occur in terms of crossing the Menai, and Welsh Government’s decision not to continue with the third bridge, will have a negative effect on the Island, and North Wales’s future.

There is strong policy support for improved crossings – from both Welsh and UK Governments.

2.5 UK Government policies on Levelling-Up (which include a £17m investment in Holyhead), Union connectivity (which calls for improved connectivity between North Wales and North-West England on the A55) and Build Back Better strongly support economic development on Anglesey and the need for improved connectivity. Poor resilience of the Menai Strait crossings does not align with one of the Union connectivity goals of securing connectivity for freight across the UK with ports, and freeports as they are established.¹⁰

2.6 In Wales, the National Plan 2040 recognises the need for economic growth to retain young people in all parts of Wales and specifically mentions Holyhead as part of the growth aspirations for North Wales as well as the need to support rural economies. The Economic Action Plan: Prosperity for All recognises the importance of tourism and the role it plays in increasing the number of Welsh speakers.

2.7 The Well-being of Future Generations Act 2015 has seven goals of which the most relevant to this scheme are:

- A prosperous Wales: through encouragement of local employment and careful management of sustainability of the project itself
- A Wales of cohesive communities: through investment in local facilities to ensure community access to employment opportunities supporting attractive, safe, viable and well-connected communities.
- A Wales of vibrant culture and thriving Welsh language: through ensuring access to employment opportunities fit to retain Welsh speaking young people, reducing the effects of net outward migration.
- A more equal Wales: through improving access to work, participation, education and health.

2.8 The North Wales Growth Deal adopts a vision for inclusive growth founded upon three key aims around innovation, resilience and connectivity, with reduced carbon at its heart. It aims to attract significant private sector investment (£1bn over 10-15 years). For this vision to be

¹⁰ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1036027/union-connectivity-review-final-report.pdf

realised, investors need to see Anglesey as an accessible opportunity and for the successful implementation of the Anglesey Energy Island Programme.

- 2.9 The above policies relating to the growth of the Anglesey economy require improved resilience of the Menai crossings.
- 2.10 The Anglesey Energy Island Programme has projects such as Morlais, which will help tackle climate change by using renewable energy to generate clean low carbon electricity. Improved resilience of the Menai crossings will help transportation of materials and labour for this programme, which in turn will help contribute to national targets for reducing carbon emissions.
- 2.11 IACC strongly agrees with the position set out in the National Infrastructure Commission Wales (NICW) Roads Review Response¹¹ which emphasises that urban and rural areas will make different contributions to reducing carbon emissions. Whilst the NICW report is not specific about its focus areas, it is notable that the review is illustrated by a single picture - of the Menai Bridge.
- 2.12 The NICW takes an explicitly long-term view (2030 – 2100) and highlights two questions that IACC believes are particularly relevant:
- Will the nature of rural transport continue to favour, and be dominated by, private car transport? What do long-term economic and social changes mean for the rural roads that make up 78% of Wales’ total road network?
 - How do we maintain and develop rural transport infrastructure that also enables important social and seasonal transport for sectors such as hospitality and tourism?
- 2.13 Under the section on “Regional and rural challenges” we share the NICW’s support for a, *“regional multi modal coordinated approach where local problems are used to inform a strategic assessment of how to achieve a sustainable integrated transport system.”* We also agree with their point that, *“it is likely that active travel and public transport is less practical for more journeys than in Wales’ urban areas.”*
- 2.14 This is true of rural areas generally, but it is particularly true of Anglesey and the Menai Crossings. As we set out below, the crossings are vulnerable pinch-points where public transport and active travel do not provide adequate alternatives for private car and freight users. IACC therefore strongly agrees with the NICW’s suggestions that:
- Road schemes should be considered with wider infrastructure developments, including housing, electricity supply, potential economic and industrial developments, social infrastructure and community cohesion.
 - Future road investments should be evaluated on a multi modal regional approach. NICW supports the targets of 10% reduction in private car usage as an average across Wales and recognises that while there are different needs of urban and rural communities, the greatest opportunity for a reduction in carbon emissions is from the urban areas.
- 2.15 The different contribution of urban and rural areas is key, especially for a rural area like Anglesey which is also an island and has a major port. IACC therefore welcomes the

¹¹ <https://nationalinfrastructurecommission.wales/2023/02/15/reviewing-roads-review/>

acknowledgement in the Commission's Progress Statement that in practical terms, the opportunities for active travel and public transport are less in rural areas.

- 2.16 In particular, we note the statement that more urbanised areas have a higher proportion of short distance journeys below 5km (p.7), which are therefore more suitable for active travel. Whilst we agree that there are shortcomings in active travel provision which encourage car use (p.9), the distances involved in journeys over the crossings mean active travel will likely never be a serious practical alternative to private car ownership.
- 2.17 We also welcome the Commission's recognition that access to public transport services in our sub-region is probably the worst of all the sub-regions and that bus services on Anglesey are infrequent and have limited operating hours (p.16)
- 2.18 The Statement notes that proposed rail improvements will do little to benefit Anglesey (p.29) and so investment in buses is key. IACC agrees, but is concerned that there is little certainty that any of the measures suggested by the Commission will come forward. Even if they do, and issues such as integration and ticketing improve, there is little prospect of the significant increase in frequency that would be required to deliver significant modal shift. Improved public transport will also do little to improve the resilience of the existing crossings.
- 2.19 IACC shares the Commission's concern that, "Financial constraints will always limit the progress that can be made in improving transport and making it more sustainable." (p.32).
- 2.20 Subsidies to bus operators (and users) on Anglesey are already large (and user numbers low) and they are likely to fall in the short term. The end of the Welsh Government's Bus Emergency Service in July 2023 is likely to mean Anglesey loses 35 - 50 percent of its bus services.^{12 13}
- 2.21 Furthermore, investment in active travel and public transport will not help our businesses, especially port users, for whom freight is a critical issue.

¹² Isle of Anglesey County Council meeting on Tuesday 23 May 2023 at 10:30am -

<https://democracy.anglesey.gov.uk/ieListDocuments.aspx?CId=127&MID=4173#A15205&LLL=0>

¹³ https://ynysmon.public-i.tv/core/portal/webcast_interactive/758945/start_time/0 - Timestamp 0:11:30

3 The performance of the current crossings

- 3.1 As noted in Table 1.1, there are already significant problems and limitations with the existing crossings. The Commission's Progress Statement acknowledges some of these issues, but underestimates their scale, impact and persistence.
- 3.2 This report notes that congestion happens in the vicinity of the Menai Strait in the summer period (p.9) and that in seasonal peak periods, the road infrastructure cannot support the resident and visitor demand, leading to congestion and pollution for both residents and visitors (p.15).
- 3.3 The reality is that congestion is a year-round feature. Both bridges have some seasonality, but the summer peak is no longer as pronounced as it was – demand is now more evenly spread across the whole year. On the Britannia Bridge, the Annual Average Daily Traffic (AADT) in August 2022 in the direction of the mainland (westbound), was just under 18,500 but it was above 17,000 each month between April and July 2022.
- 3.4 Traffic across the Britannia Bridge has increased to more than pre-pandemic levels. Traffic across the Menai Suspension bridge has decreased over time due to a 60% reduction in 2-axle HGVs in 2010, which lead to a significant drop in vehicles travelling across this bridge.¹⁴ More recently, the bridge had a vehicle weight restriction of 7.5 tonnes. This means the Britannia Bridge is no longer a viable route for LGVs and HGVs.
- 3.5 On p.21 the Progress Statement states that for visitor / tourism travel, "localised congestion is predominantly an issue for small towns, villages, and countryside and coastal locations." This is not true for Anglesey. The problems are not localised - congestion on the crossings affects the entire Island, as residents and visitors cannot easily cross. This results in congestion on the island and communities living immediately within the vicinity of the crossings such as the Menai Bridge and Llanfairpwllgwyngyll.

Congestion near and across both bridges during peak hours causes journey time delays

- 3.6 Congestion across the bridges is high during the weekday AM (08:00-09:00 hours) and PM (16:00-17:00) peaks. The traffic is heavier in the direction of mainland during the morning peak, and conversely, it is heavier in the direction of Anglesey in the evening peak.
- 3.7 There are significant journey time delays during the AM and PM peak hours. It is estimated that travelling from the A55 J7 at Gaerwen to Britannia Bridge Eastbound takes less than 10 minutes at off-peak times. However, on the busiest days during the AM peak (08:00-10:00 hours), this journey may take up to 35 minutes¹⁵.

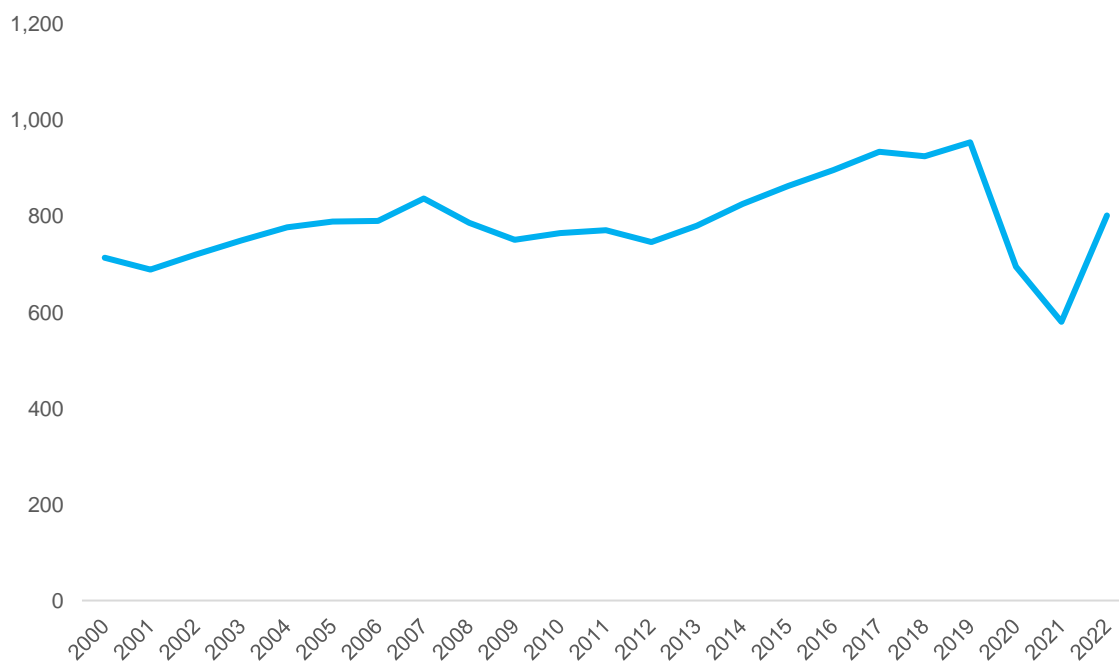
¹⁴ https://www.gov.wales/sites/default/files/publications/2019-01/180309at1sn12021doc1_0.pdf

¹⁵ Traffic Wales, A55 Britannia Bridge Journey Planning. 2023

Port traffic further affects the congestion levels

- 3.8 The Port of Holyhead is the second largest roll-on roll-off port in the UK (after Dover).¹⁶ It is the main port for freight and sea passenger transport between the UK and the Irish Republic. As part of the E22, it is a key connection in the “land bridge” from Ireland to Europe and is the fastest route despite an increase in the number of ferries from Rosslare to mainland Europe. Nearly 60% of goods carried on HGVs travelling between the Republic of Ireland and Europe pass through the Port of Holyhead. Furthermore, this port accounts for three quarters of passenger traffic between Wales and the Republic of Ireland.¹⁷
- 3.9 Over the years, the tonnage of freight transported via this Port has been increasing, leading to an increase in the number of vehicles travelling to and from Anglesey to transport the goods. Figure 3-1 shows that the annual port traffic (freight and passenger cars combined) at the Port of Holyhead has been on an upward trend, reaching 953,000 vehicles (all types) in 2019. Since 2019, the traffic numbers declined, which is mainly attributed to the Covid-19 pandemic and UK’s exit from the European Union however, have recovered by 38% between 2021 and 2022.

Figure 3-1: Total units of port traffic (all types of vehicles) at the Port of Holyhead by year (thousands)¹⁸



- 3.10 Some port arrivals and departures also coincide with both the morning and evening traffic peaks, further exacerbating congestion across the bridges.

- 3.11 Overall, the congestion across the two bridges leads to rat running through the local communities, which has negative economic and social impacts:

¹⁶ <https://www.itv.com/news/wales/2019-10-08/holyhead-the-uk-s-second-biggest-ferry-port-absolutely-not-ready-for-a-no-deal-brex>

¹⁷ <https://www.gov.wales/sites/default/files/statistics-and-research/2021-12/sea-transport-2020.pdf>

¹⁸ Table PORT0301: UK major port freight traffic by port and year (filter by direction and cargo type), from 2000 and Table PORT0503: UK major port traffic by port (filter by direction and cargo group estimate), quarterly from 2018

- Increased air and noise pollution – particularly Lon Refail in Llanfairpwllgwyngyll, which runs alongside the A55 between J8 and J8a has increased air pollution, noise and vibration levels for local residents.
- The A55(T) bypass at Llanfairpwllgwyngyll was built in the early 1980s and has been a regular NO₂ diffusion tube monitoring location for more than 10 years. The IACC’s Air Quality 2015 Updating and Screening Assessment identified that the kerbside of the A55(T) at Llanfairpwllgwyngyll is the only location which has had past exceedances of the Welsh Assembly Government’s annual objective of 40µg/m³ for this pollutant.¹⁹
- Impact on tourism and business development due to journey time delays.
- Impact on the freight and passengers at the Port of Holyhead as journey times to and from the Port increase.
- Impact on emergency services access since the closest A&E is on the mainland with both staff and patients unable to access Ysbyty Gwynedd.
- Poor resilience for all vehicles including public transport, thus disincentivising the use of busses, which can only cross on the Britannia Bridge due to weight restrictions.
- Impact on education due to school and staff unable to access schools and especially Ysgol David Hughes, MB Primary and Ysgol Llanfairpwll.
- Road safety concerns outside schools due to lack of alternative routes and rat running of HGVs.

Safety and Reliability

- 3.12 As well as regular congestion, there are serious problems with reliability with a high risk of closures due to bad weather and incidents.
- 3.13 The Menai Suspension Bridge was closed for nearly four months between 21 October 2022 and 2 February 2023 due to public safety concerns. Traffic was redirected to the Britannia Bridge causing further congestion and delays on that bridge, economic damage in Porthaethwy and the wider southeast Anglesey area.²⁰
- 3.14 Between 2017 and 2022, the Britannia bridge was closed seven times due to particularly high winds (gusts over 70mph).²¹ Since 2017, there have been 12 serious and two fatal accidents on the Britannia Bridge, and 11 serious accidents on the Menai Suspension Bridge. The most recent fatal incident occurred on 23 May 2023 on the Britannia Bridge leaving the bridge closed for several hours in the morning and traffic redirected during peak hours, severely increasing journey times.²² Businesses also noted that the closure was “a nightmare” for them.²³
- 3.15 In general, closures due to fatal incidents on the Britannia bridge last approximately eight hours. Bridge closures due to other reasons cause delays up to five hours and as far as five miles.

¹⁹ <https://www.anglesey.gov.wales/documents/Docs-en/Environmental-health/Pollution/Updating-and-Screening-Assessment-2015.pdf>

²⁰ <https://www.dailypost.co.uk/news/north-wales-news/menai-bridge-reopened-traffic-after-26135720>

²¹ <https://www.thebangoraye.com/menai-suspension-bridge-closure-your-questions-answered/>

²² <https://www.northwaleschronicle.co.uk/news/23541707.man-dies-early-morning-crash-near-britannia-bridge/>

²³ <https://www.bbc.co.uk/news/uk-wales-64422707>

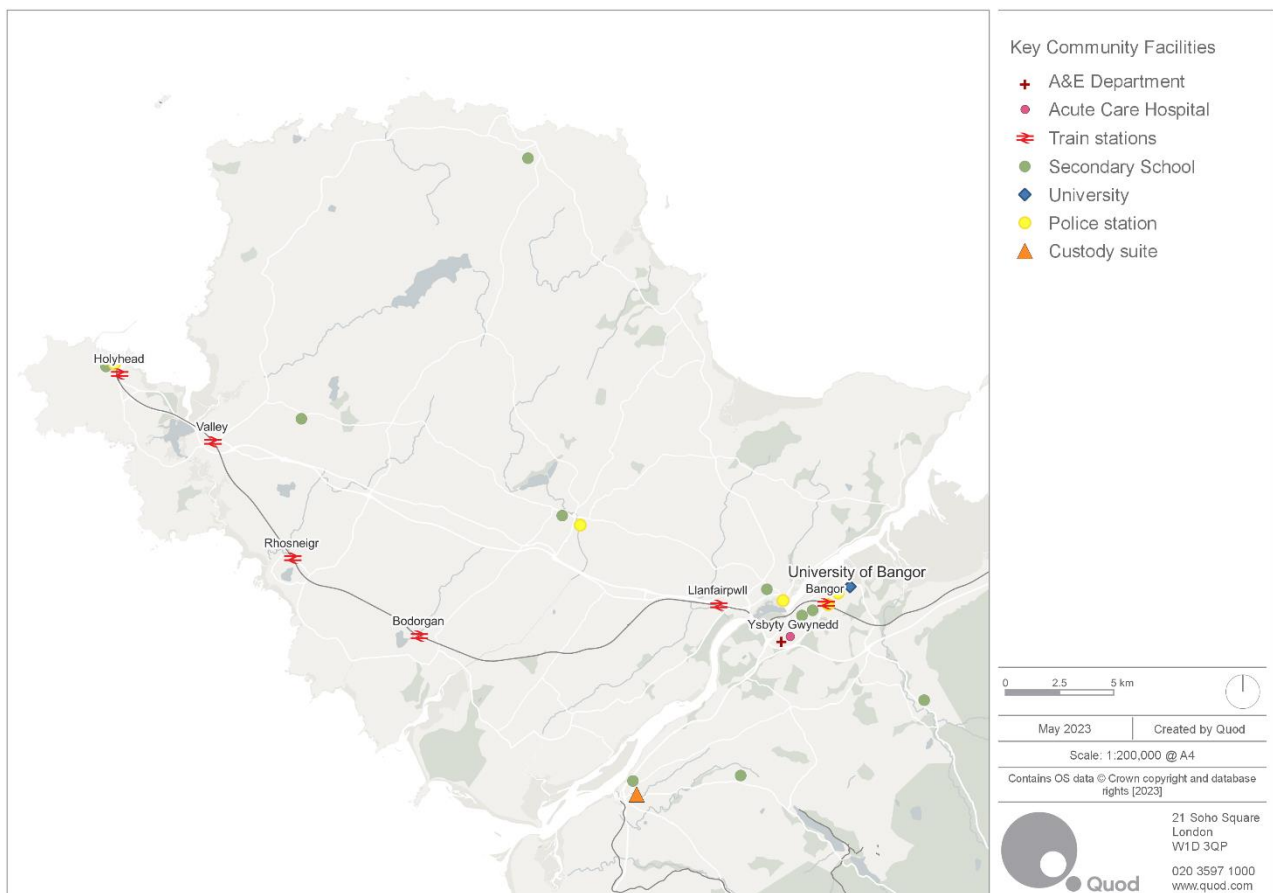
4 Anglesey's challenges

4.1 Anglesey residents are unusually reliant on the bridges. Many key healthcare, educational and crime and justice facilities are located on the mainland. It has the only travel to work area (TTWA) in Wales that is severed by water. Access to mainland Wales is only possible via the two crossings, both of which have reliability and resilience issues. This complicates the situation for the residents, visitors, businesses and the Port of Holyhead.

Reliance on the mainland

4.2 The closest community facilities such as an A&E department, acute care hospital and a university are all located on the mainland in Bangor. The closest custody suite is located in Caernarfon (on the mainland), which is even further from the two crossings and the emergency mental health services are in Ysbyty Gwynedd. Access to these critical facilities is dependent on the reliability and resilience of the existing crossings across the Menai Strait. These are shown in Figure 4-1 below.

Figure 4-1: Closest community facilities



4.3 As the NICW noted, roads should be considered as part of a system within the wider travel, green and blue, social and economic infrastructure.

- 4.4 As well as being key community facilities, these are also important sources of jobs to Anglesey residents.

Loss of jobs in high-value sectors

- 4.5 In Anglesey, the 23,000 jobs recorded in 2021 were less than 2% of Wales's total employment numbers²⁴ and job density is only half of that of Wales. The low number of jobs in Anglesey is due to its long history of repeated shocks, which have resulted in over 2,300 job losses over the last 20 years, equivalent to 10% of current employment. This includes companies and sectors with a long history, in some cases over half a century, of operating within the Anglesey community:

- The construction of the Wylfa Magnox nuclear power station began in the 1960s and the plant was decommissioned in 2015, resulting in the loss of over 300 jobs. The halting of work on Wylfa Newydd was a further blow to the Anglesey economy.
- Anglesey Aluminium began producing aluminium in Anglesey in the early 1970s – it operated for almost 40 years before closing in 2009 resulting in the loss of over 300 jobs.
- The Octel site in Amlwch was first selected in 1949 to extract bromine from sea water plant and production began in 1953. The site operated until 2004 when over 100 jobs were lost.

- 4.6 What were once the island's dominant industries – manufacturing, energy, and transportation and storage have now been overtaken by the foundational economy.²⁵ The largest sector is wholesale and retail trade accounting for 17% of Anglesey's employment (higher than the Welsh average of 15%), followed by the accommodation and food service activities (14%) and human health and social work activities (12%).²⁶ These sectors typically have some of the lowest median annual wages across Wales, whereas the historically dominant sector were high-value and high-paid sectors.

Jobs

- 4.7 The loss of jobs has left low job density both spatially and per capita.
- 4.8 Anglesey now has only 32 jobs per square km – only half of that of Wales, with jobs mostly concentrated in urban areas such as Holyhead and Llangefni. This has also caused productivity in Anglesey to lag that of Wales.
- 4.9 Anglesey also has one of the lowest job densities per 1,000 working age residents. As a result, nearly 40% of working residents commute off the island.²⁷ These commuters primarily travel to Gwynedd and especially Bangor, aligning with the findings of the North Wales Transport Commission that movements to and from Bangor are important.²⁸ These areas are dominated

²⁴ BRES, 2023

²⁵ The services and products in the foundational economy provide those basic goods and services on which every citizen relies to remain safe, sound and civilised. Care and health services, food, housing, energy, construction, tourism and retailers on the high street are all examples of the foundational economy. <https://businesswales.gov.wales/foundational-economy>

²⁶ BRES, 2023.

²⁷ NOMIS, Office for National Statistics (ONS).

²⁸ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

by human health and social work activities, wholesale and retail trade, and higher education. A substantial number of people travel to work to Coleg Menai and Bangor University.

- 4.10 Conversely, commuting for work to Anglesey is significantly lower, only 17% of those working in Anglesey are coming from the mainland.²⁹ The majority of this movement originates from Gwynedd.

High transportation cost means businesses don't relocate and the island has a lack of jobs

- 4.11 Quod recently undertook an Employment Land Review (ELR) on behalf of the IACC, Cyngor Gwynedd (CG) and Eryri National Park Authority (ENPA) to support the review of the authorities' respective local development plans. This study revealed that there is office demand from businesses in established areas all along the A55 from Chester to Conwy in North Wales, but not further. This is likely to be driven by the difficulty of accessing Anglesey and the high transportation cost of getting to the island.
- 4.12 Parc Menai in Bangor has seen significant investment and opportunities for employment such as the development of the Coleg Menai Bangor Campus³⁰ and a new business support centre.³¹ While Parc Menai is close to the Britannia Bridge on the mainland, businesses have not crossed the bridge into Anglesey in part due to Anglesey's peripherality and the lack of reliability and resilience in accessing the island. This means businesses are disincentivised to relocate to the island and employment opportunities will not arise.

Loss of the young working population, and the Welsh Language and Culture

- 4.13 As shown in Figure 4-2 below. Anglesey's working-age population is declining. The number of people aged 35-49 years decreased by 17.2% (from c. 13,300 to 11,000). Its ageing population is increasing – a 23.6% increase in people aged 70 years or above (from c. 2,700 to 3,400). The median age has also increased from 45 to 48 years between the two census years³².

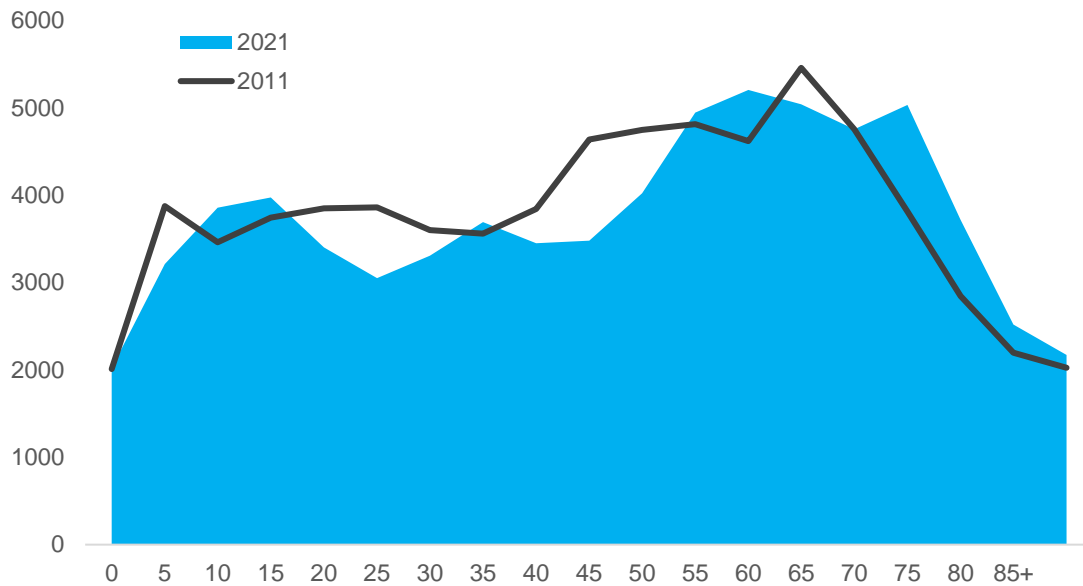
²⁹ NOMIS, Office for National Statistics (ONS).

³⁰ <https://www.gllm.ac.uk/news/work-commences-on-20-million-t%C5%B7-menai-transformation>

³¹ <https://www.northwaleschronicle.co.uk/news/19135472.parc-menai-college-business-support-centre-contract-won-anglesey-based-construction-firm/>

³² <https://www.ons.gov.uk/visualisations/censusareachanges/W06000001/>

Figure 4-2: Community age profile in 2021 vs 2011



4.14 Retaining the younger population in Anglesey will allow for knowledge sharing and culture between generations to help form a resilient and vibrant community. For the economy, retaining a younger population will help address skill gaps, talent development and succession planning. The above effects pose risks and challenges for the Anglesey community associated with:

- increased pressures on healthcare facilities
- a rise in the dependency ratio and the need for care
- reduction in the size of the labour market
- loss of Welsh culture and speakers of the Welsh language.

Anglesey is rural with long commuting times

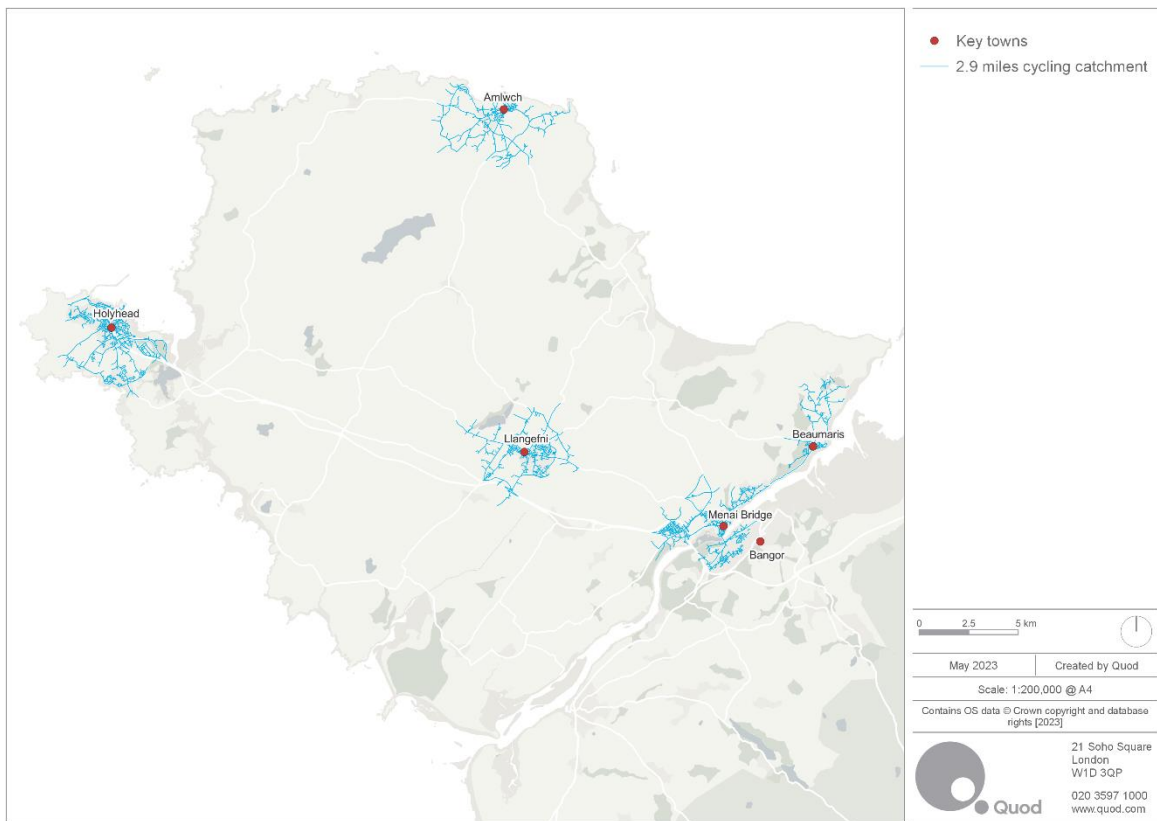
4.15 Nearly 60% of the Anglesey population is rural. Its rurality means that up to 40% of all journeys are greater than 15km.³³ This means commuter travel long distances, especially from rural areas to cross the bridges.

4.16 As a result, active travel can play less of a role here than in other places. The typical cycling commute is 2.9 miles.³⁴ Figure 4-3 below demonstrates that such distance does not get commuters very far on Anglesey, where distances between towns and to the mainland are long.

³³ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

³⁴

Figure 4-3: 2.9-mile cycling catchment from the main Anglesey town centres



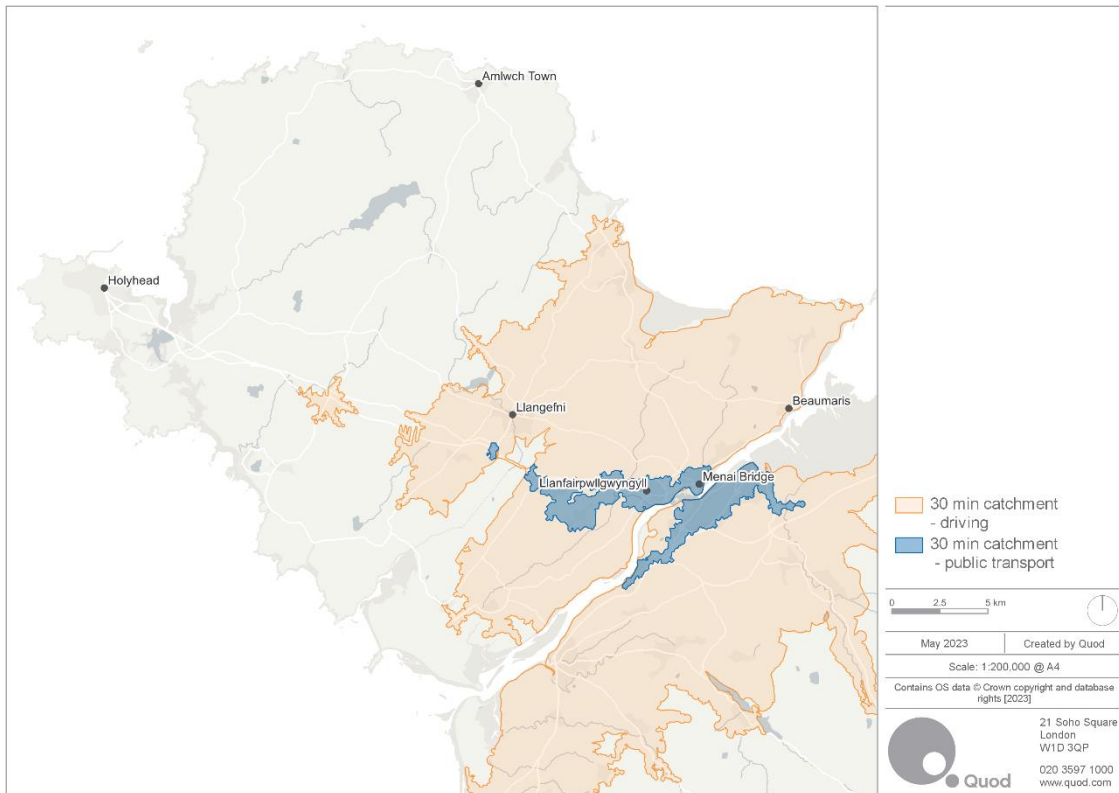
4.17 There are also concerns about the safety of some cycling paths such as the path leading from Pentraeth Road to the Menai Suspension Bridge, which was constructed from a series of steps that have been flattened. The incline of the path is “lethal”, which could be a challenge for the elderly and young families.³⁵

High reliance on private vehicles since active travel is too short, the bus network is terrible and rail won't make an impact

4.18 Figure 4-4 below shows a comparison of how much more distance can be covered in a car vs a bus in 30 minutes during the morning peak from the Menai Bridge – the closest point on Anglesey to the mainland. Even with a car the distance covered is not great and for major population centres like Llangefni, the situation is obviously worse.

³⁵ <https://www.northwaleschronicle.co.uk/news/15752373.lethal-menai-bridge-cycle-route-worries/>

Figure 4-4: Driving vs bus in 30 minutes



- 4.19 There is limited bus service provision wholly under contract, with the Isle of Anglesey County Council, adult day tickets are expensive (£6 in Anglesey vs £4 in Cardiff) and is heavily subsidised. Still usership remains low. The hours of operation of the bus service do not suit those working in Ysbyty Gwynedd (and other) hospitals, which is a significant employer for the island residents and those in the hospitality industry (a dominant industry on the island).
- 4.20 Furthermore, there are concerns that the Welsh Government's Bus Emergency Service (BES3) support for Anglesey that is due to end on July 24, 2023, will not continue.³⁶ This could leave the island residents, in particular the vulnerable and elderly, cut off. This reinforces the reliance on private vehicles for travel.
- 4.21 Transport for Wales (TfW) has launched the North Wales Metro Programme to make it easier and faster to travel across North Wales.³⁷ However, the timing of these projects is still unclear and the North Wales Transport Commission acknowledged that for many parts of North Anglesey, rail improvements will not make a significant impact. Additionally, rail electrification across North Wales as part of this programme will be in three stages – Chester to Llandudno Junction, Llandudno Junction to Bangor and Bangor to Holyhead. The cost is expected to roughly double as the stages progress. This means rail improvements across the Menai Strait are unlikely for many years. These factors further emphasise the need for private vehicle use.
- 4.22 Many Anglesey residents do not live close to a train station either and hence rely on private vehicles. In general, for public transport to be an attractive alternative, there needs to be a

³⁶ <https://www.dailypost.co.uk/news/north-wales-news/anglesey-councils-rural-bus-funding-26977540>

³⁷ <https://tfw.wales/projects/metro/future-developments/north-wales>

regular provision at both the journey origin and destination. This is unlikely and unsustainable for a rural area. This leads to increased private vehicle ownership and consequently a need for a reliable crossing across the Menai Strait to sustain the high reliance on private vehicles.

High car ownership

- 4.23 Overall, expensive, infrequent public transport leads to low ridership and manifests itself in the dominance of private vehicle as the main mode of transport. The working population driving for work is approximately 40 times the working population taking public transport for work. This further reinforces the need for a reliable and resilience across the Menai Strait for those travelling to work.

Recovery / growth at the Port of Holyhead is restricted if logistics firms seek more reliable routes for trade (including outside the UK)

- 4.24 Freight from the Port of Holyhead is transported across the E22 as it is the fastest road route on the island. Delays from the two crossings puts this route in jeopardy and decreases demand for direct Ireland to Europe routes. The Port is one of Holyhead's major employers and Holyhead is the town most reliant for the port for jobs in all of Wales.
- 4.25 Low reliability of access to the Port of Holyhead also means increasing amounts of trade are likely to bypass the UK altogether and take the longer, slower and more carbon intensive route for direct ferries from Ireland to mainland Europe.

5 Anglesey's economic future

- 5.1 The projects mentioned below are planned on being delivered to improve the Anglesey economy. These projects are reliant on good access to the island in order to provide confidence for investment and the ability to move goods.

Anglesey Freeport designation promises more, and well-paid jobs

- 5.2 Following a successful joint bid by Stena Line and the IACC, Anglesey will now benefit from Freeport status, where simplified customs and trade rules will apply, providing greater incentives for investment and trade. In future, goods entering and remaining within Anglesey Freeport will not be subject to the UK's usual tax and customs regime, supporting long-term business investment, and boosting the prosperity of Anglesey and North Wales.
- 5.3 It is expected that the Freeport could help create up to 13,000 high-skilled, well-paid jobs in North Wales over a 15-year period, increase local productivity and increase manufacturing output across North Wales. Freeport status would also provide a significant boost for the Energy Island Programme and support the path to Net Zero. It is estimated it would attract £800 million of investment.
- 5.4 Stena Line and IACC are actively engaging with local stakeholders (Bangor University, M-Sparc, the Institute of Export and International Trade, Grwp Llandrillo Menai) on plans to integrate delivery of the Freeport with existing local strategies, including those to upskill the local workforce.
- 5.5 Opportunities include accelerating the take up of sustainable, clean energy production by building on existing industry-leading net zero initiatives on Anglesey, such as offshore wind, nuclear, solar and tidal energy.
- 5.6 To make the most of the Freeport designation, and support the current volumes of the Ro-Ro freight at the Port of Holyhead (second in the UK after Dover), Anglesey requires resilience across the Menai Strait. Were the travel situation to remain the same, traffic congestion is expected to become worse, as more goods are projected to enter and leave Anglesey in the coming years.**

M-SParc will drive innovation and attract more high-skilled jobs

- 5.7 Opened in 2018, M-Sparc is the first Welsh Science Park offering 31,200 square feet³⁸ of lettable offices, laboratory and workshop space for up to 700 people. It will drive economic growth through innovation and bringing high-value, high-skilled jobs to Anglesey, which are key to reduce the reliance on foundational economy.
- 5.8 The science park is located conveniently next to A55 J7 junction in Gaerwen village and the facility offers EV charging points. However, currently, during peak hours, there are significant

³⁸ <https://www.willmottdixon.co.uk/projects/m-sparc-menai-science-park>

delays on the Britannia and Menai Bridges which increase journey times for those commuting from off-the island to M-SParc.

5.9 A reliable, and convenient commuter route is important for M-SParc to remain competitive and continue attracting talent and businesses from across North Wales.

Anglesey Energy Island

- 5.10 The Anglesey Energy Island Programme, established by IACC, is a collective effort between several stakeholders within the public, private and third sectors working in partnership, putting Anglesey at the forefront of low carbon energy research and development, production and servicing, and bringing with it potentially huge economic rewards.
- 5.11 Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.
- 5.12 Wylfa is well placed to contribute to the UK's future nuclear capacity. It is well placed to support the development of Small Modular Reactors (SMRs) or a gigawatts plant. Such investment would unlock significant benefits for North Anglesey, bringing forward as many as 1,000 well paid, secure jobs at the operational stage, as well as significant need for construction employment and supply chain effects. Any significant development at Wylfa would result in construction and supply chain benefits that could transform the economy of North Anglesey.
- 5.13 Wylfa is classified as one of the eight potential sites in the National Policy Statement for new nuclear power stations. Resilience across the Menai Strait is crucial in realising this policy.³⁹
- 5.14 The Energy Island Programme is not just about Wylfa – there are additional opportunities:
- Hydrogen Hub at Parc Cybi in Holyhead, which will be the first development of its kind in Wales.
 - Morlais – Anglesey Marine Energy, which is a tidal energy project brought forward by Menter Môn which aims to benefit local communities, the economy and help tackle climate change by using renewable energy to generate clean low carbon electricity. It is a significant opportunity for Anglesey to be a world-leader in the development, manufacturing and installation of tidal energy equipment. The project will have significant effects for Anglesey and Wales and will play a key role in delivering the Energy Island.
 - Minesto's Holyhead Deep (the name deriving from the name of the large depression in the seabed west of Holyhead), is the world's first low-flow tidal stream project. The area matches all the site requirements by providing low-flow tidal velocities (1.5–2 m/s mean peak flow) at a depth of 80–100 metres. The offshore site is only 8 km from the port and town of Holyhead where Minesto UK head offices are located. The head office's presence has seen several full-time jobs created to date and the project is already stimulating businesses through supply chain. Minesto's long-term plan is to expand the Holyhead Deep site into a commercial tidal energy array with a total installed capacity of

³⁹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/47859/2009-nps-for-nuclear-volumel.pdf

up to 80MW, supplying local and clean energy to the equivalent of almost 70,000 households.⁴⁰

- Additionally, Anglesey is one of the most attractive locations for offshore wind development and also a potential attractive location for landing and servicing point for substantial future offshore investments in the Irish sea.

5.15 Benefits from these projects include:

- Significant employment opportunities for a diverse range of skills and professions are expected in due course as major developments move towards their construction and operational phases.
- Involvement of local SMEs in the supply chain activities of these projects.
- Programme and achieving the Net Zero commitments.

5.16 Each of the Anglesey Energy Island projects (and particularly Wylfa) is infrastructure heavy and will require reliable and resilient road network for the transport of materials and to serve the increased worker traffic during both the construction and operational phases.

Sustainable Tourism

5.17 The North Wales Transport Commission acknowledged that congestion is an issue for small towns, villages, countryside and coastal locations. With congestion during peak hours and holidays, and regular maintenance and closure of the bridges, congestion is likely to exist across Anglesey as a whole. This means tourists are less incentivised to visit Anglesey, which has a follow-on effect of lower spending in the retail, accommodation and food services sectors which are now dominant in Anglesey.⁴¹ Similarly, poor resilience of the Menai Strait crossings means negative press, which could also lead to less visits to the island.

5.18 Resilience of the crossings is important because there is already demand for tourists to visit the island. Post Covid-19, there was a large influx of visitors, well over capacity of the road network, tourist attractions and waste management, despite a 53% increase in accommodation listings on the island between 2017 and 2021.⁴² While there have been a large number of visitors, not improving the resilience of the crossings now means these visitor numbers will not be sustainable in the future.

5.19 As there is a capacity constraint on the number of people the island can accommodate at any one time, a more sustainable approach needs to be taken through:

- More equal distribution of tourists (and spending) across the island rather than entirely additional growth.
- Managing tourism to be ensure it is socially sustainable (including the behaviour of tourists).
- Growth of green, environmentally sustainable tourism.

⁴⁰ <https://minesto.com/holyhead-deep/>

⁴¹ <https://www.gov.wales/sites/default/files/publications/2023-01/nwtc-progress-statement-final.pdf>

⁴² Draft Destination Management Plan 2023-2028 <https://www.anglesey.gov.wales/documents/Docs-en/Council/Consultations/2023/destination-management-plan-2023-to-2028/Destination-Management-Plan-DMP-2023-to-2028.pdf>

5.20 The draft Isle of Anglesey Destination Management Plan 2023-2028 sets out the vision for the visitor economy:

“We seek a visitor economy which is empathetic to the Island’s sense of place, and is seen to benefit the people, environment, culture, heritage and language, and continues to play a pivotal role in the economic stability of the island.”

5.21 The guiding principles and priorities of the Plan focus on:

- Celebrate, Respect and Protect our Communities, History, Language, Culture and Heritage – Anglesey’s visitor economy should build on existing strengths of language and culture and promote local heritage to a wider audience.
- Enhance the Visitor Experience Offer and Economic Sustainability – Anglesey’s visitor economy should grow sustainably based around a high-quality offer where visitors value and respect Anglesey’s culture, heritage and environment. Additionally, quality visitor infrastructure will enhance recreational opportunities leading to improved health and wellbeing.
- Maintain, Enhance and Respect our Environment, and plan to mitigate impacts of Climate Change – Anglesey’s visitor economy needs to become more ‘climate change ready’, increasingly carbon neutral. Tourism activities need to be in harmony with the natural environment.
- Ensure that the advantages to Anglesey communities outweigh any disadvantages, and as a result social and wellbeing benefits are seen – Anglesey’s visitor economy needs to benefit local communities, giving local people opportunities for new skilled roles and working with local supply chains.

5.22 Additionally, in 2022, IACC has secured three years ‘Sustainable Landscapes Sustainable Places’ funding (£575,000) from the Welsh Government to support running a number of environmental projects.

5.23 The projects will help enhance biodiversity and support the Council’s objectives to tackle climate change through four key themes, one of which focuses on ‘Delivering Sustainable Tourism’. Between 2010 and 2021, there was nearly a 50% increase in the economic impact of Anglesey’s visitor economy.

5.24 A third crossing is required to support the growth of sustainable tourism on Anglesey. Such route would relieve the pressure of the increased holiday traffic off the two existing bridges.

Town centre regeneration and investment in local infrastructure

Town centre regeneration

5.25 Investment in town centres is a key priority for both Isle of Anglesey County Council and the Welsh Government. The IACC is looking to support each Town Council on the island to support local leadership and make best use of available sources of funding (including Welsh Government funding) to improve their town centres.

- 5.26 The draft Town Centre Investment Framework sets out the overall strategy for how IACC wants to take advantage of new funding opportunities and support the Anglesey town's to be vibrant and successful places that are the focal points of the island's social, economic and cultural activity.
- 5.27 The draft Town Centre Investment Plans for the five main Anglesey towns (Holyhead, Amlwch, Llangefni, Menai Bridge, Beaumaris) assess the key challenges and opportunities of each town and set out the key investment priorities (aligned with the Placemaking Wales Charter⁴³) for supporting the success of the town centre.

Levelling Up Funding

- 5.28 In January 2023, the UK Government announced that the Council's "Holyhead: A culture and heritage driven transformation" bid for Round 2 of the Levelling Up Fund has been successful. It will help to transform the town by securing £22.5m of investment, including £17 million from the Levelling Up Fund, and deliver more than £54m in benefits to the local community.⁴⁴
- 5.29 Isle of Anglesey County Council worked in partnership with Holyhead Town Council, Môn CF, Ucheldre Arts Centre and the Church in Wales to understand the area's needs and present a package of interventions in and around Holyhead. The town has some of the worst deprived neighbourhoods in Wales and the Levelling Up Funding will see key local assets enhanced to make the area a better place to live and visit.

Investment in local infrastructure

- 5.30 Investment in local infrastructure is needed to support the jobs and local communities of Anglesey. Maximising the benefits of the Energy Island Programme and the Freeport designation requires there to be employment space for SMEs to grow. Investment is critical, as there is a historic undersupply of high quality floorspace for SMEs, which is restricting economic growth across the island.
- 5.31 Building on a IACC's successful Sites and Premises Programme, a Strategic Outline Case was written to bring forward new business units in Amlwch to ensure businesses have the right space to set-up and/or grow. Based on evidence of market demand, further similar projects need to be undertaken to support the provision of employment floorspace in other Anglesey locations. Currently there are four IACC business units in Amlwch, which are all occupied and there are over 75 IACC units across Anglesey. IACC estimates that majority of the tenants are Anglesey residents implying demand for local businesses.
- 5.32 A third crossing is important for the successful regeneration and investment in Anglesey's town centres. A reliable route across the Menai Strait will improve the regular journeys for the residents, improve the perception of place for the visitors and increase the confidence of businesses to locate in Anglesey's town centres.**

⁴³ Placemaking Wales Charter (2020), http://dcfw.org/wp-content/uploads/2020/09/PlacemakingWales_A4Charter_ENG.jpg

⁴⁴ <https://www.anglesey.gov.wales/en/Business/Economic-development/Levelling-Up-Fund-LUF/Levelling-Up-Fund-Holyhead-bid.aspx>

6 The need for multi-modal solutions

- 6.1 IACC strongly supports measure to reduce car use and to promote active travel and public transport and wants to see better integration of bus services and improved active travel options, including over the Menai crossings.
- 6.2 However, given the island's circumstances, there are limits to what they can achieve. The NICW notes that in rural areas, it is likely that active travel and public transport is less practical for more journeys than urban areas in Wales. This has been evidenced earlier in this report by the high cost, infrequency and long journey times on public transport along with the NWTC also stating that bus services in Anglesey are infrequent and have limited operating hours.
- 6.3 The NWTC also noted that:
- *“There is a lack of attractive or realistic sustainable transport alternatives to the private vehicle for journeys by residents, workers, and visitors in North Wales. This is contributing towards dependency on private vehicles and limiting social, economic and cultural connections.”*
 - Rail improvements will not make a significant impact for many regions in North Wales.
- 6.4 In the NWTC interim report for June 2023⁴⁵, the Commission intends to investigate options for improving the resilience of the existing crossings such as:
- Three lanes running or tidal flow on Britannia Bridge.
 - Reconfiguration of A55 junctions adjacent to Britannia bridge.
 - Provision of active travel on Britannia bridge.
 - Priority for active travel on the Menai Suspension bridge.
 - Priority for active travel and buses on the bridges.
 - Wind deflectors on Britannia bridge.
- 6.5 However, IACC has considered these options previously and is of the view that these options will not sufficiently address the resilience and reliability issues.
- 6.6 While the Welsh Government has outlined its vision for buses in Llwybr Nwedd and Bws Cymru, there is currently little certainty over its future. Despite the large bus service subsidy in Anglesey, ridership remains low. Furthermore, the bus service is unlikely to help businesses dependent on the freight movement from the Port of Holyhead.
- 6.7 Despite advising the Welsh Government against a third Menai crossing, the Roads Review Panel recognised the importance of road freight travelling to and from Holyhead and its dependency on a network resilience. The panel also recognised if this scheme reduces journey times and improves reliability of buses, it could improve access to employment opportunities

⁴⁵ <https://www.gov.wales/sites/default/files/publications/2023-06/north-wales-transport-commission-interim-report-june-2023.pdf>

and improve access to active travel modes. Connectivity to the Wylfa nuclear power station site would also be improved.⁴⁶

6.8 The scheme has a good Benefit Cost Ratio (BCR) of between 1.8 and 2.2 with 90% of total benefits from journey time savings. This BCR is likely to be understated because:

- Resilience and reliability benefits are not fully captured.
- The Welsh Transport Appraisal Guidance (WelTAG) underweights the value of freight. The Port of Holyhead is the UK's second largest roll-on roll-off ferry port after Dover.⁴⁷
- The benefits don't capture effects on business investment and land use changes, e.g. changes in freight trips.

6.9 As the WNIC noted, the Welsh Government headline target in reducing vehicle mileage is an average one – some areas will achieve more, others less. Anglesey as a whole will play its part and will reduce car mileage within the island. That does not mean that the existing position on the crossing cannot be fixed by enhancing private travel options.

6.10 As mentioned in the Strategic Outline Case in 2019, benefits of a third Menai crossing include:

- Transport related benefits such as improved resilience of the network to events such as scheduled maintenance and emergencies or the impacts of bad weather.
- Fewer emissions from less queuing traffic and more efficient engine operation.
- Societal benefits such as improved social inclusion through more connected communities.
- Safer road environment for pedestrians, cyclists and motorised users.
- Benefits to the economy including improved connectivity across North Wales and between the UK and Ireland, promotion of tourism and improved opportunities for inward investment.

6.11 Overall, it is not prudent to just consider maintenance of roads in isolation. Consideration should be placed on how it impacts future housing, green and blue infrastructure, electricity supply, potential economic and industrial developments, social infrastructure and cohesion.

6.12 Since the resilience and reliability of the Menai crossing goes beyond just transport related benefits and affects wider future infrastructure developments, **it is more than just a road scheme.**

6.13 The evidence contained in this summary report and in the accompanying evidence base document sets out the importance of the crossings to the future of Anglesey and its economy. Anglesey has struggled from the loss of key employers in recent years, in part because of its peripherality and the cost of doing business from the island.

6.14 As a result, it has become even more dependent on the mainland for jobs for its residents and for access to key community facilities.

⁴⁶ <https://www.gov.wales/sites/default/files/publications/2023-02/the-future-road-investment-wales.pdf>

⁴⁷ <https://www.itv.com/news/wales/2019-10-08/holyhead-the-uk-s-second-biggest-ferry-port-absolutely-not-ready-for-a-no-deal-brexite>

- 6.15 The unreliability and congestion of the existing crossings make life a misery for those trying to cross them and those who live around them. This affects schools, the police and health services as well as the islands businesses and residents.
- 6.16 It is a deterrent to investors and to potential visitors and threatens to hold back a once in a generation opportunity to reverse Anglesey's decline and loss of residents with the opportunities for the Freeport and delivery of low carbon energy projects on the island. Anglesey is competing for investment and without improvements to the congestion, reliability and resilience of the crossings the opportunity could be lost.