The Sizewell C Project

6.3 Volume 2 Main Development Site

Chapter 9 Socio-economics

Revision:	1.0
Applicable Regulation:	Regulation 5(2)(a)
PINS Reference Number:	EN010012

May 2020

Planning Act 2008
Infrastructure Planning (Applications: Prescribed Forms and Procedure) Regulations 2009

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Appendix 9F: Sizewell C: Suffolk Coast Visitors Survey.

9 Socio-economics

9.1 Introduction

9.1.1 This chapter of **Volume 2** of the **Environmental Statement** (**ES**) (Doc Ref. 6.3) presents an assessment of the socio-economic effects arising from the construction and operation of the Sizewell C power station at the main development site, and the associated development sites (referred to throughout this volume as 'the proposed development'). This includes an assessment of potential impacts, the significance of effects, the requirements for mitigation and the residual effects. The assessment is project-wide in nature – it considers the overall socio-economic effects of the Sizewell C Project's components on sensitive receptors such as the labour market, housing market and public services.

9.1.2 Descriptions of the existing site and proposals for the main development site are provided in **Chapters 1-4** of this volume of the **ES**. Descriptions of the existing sites and proposals for associated development sites are provided in **Chapters 1-2** of **Volumes 3-8** (Doc Ref. 6.4-6.9) of the **ES**. A description of the anticipated activities for the decommissioning phase, including a summary of the types of environmental effects likely to occur is provided in **Chapter 5** of this volume. A glossary of terms and list of abbreviations used in this chapter is provided in **Appendix 1A** of **Volume 1** of the **ES** (Doc Ref. 6.2).

9.1.3 The scope of the socio-economic assessment considers the following construction and operational phase impacts.

a) Construction impacts

- Economic impacts:
  - labour market impacts due to change in the level of construction employment generated in the economy;
  - employment impacts due to a change in the overall level of employment; and
  - business and supply chain impacts as a result of contracts and spending related to the Sizewell C Project.
- Accommodation impacts:
  - impacts on overall supply of homes as a result of increased demand generated by the temporary construction workforce;

  - tourist sector accommodation impacts;
  - private rented sector (PRS) impacts; and
  - owner-occupied sector impacts.

- Population dynamics: impacts on the existing population due to an increase in population generated by the construction workforce.

- Public services impacts of increased demand generated by the construction workforce and their families for the following services:

  - childcare and education services – early years, primary school and secondary school places;
  - social services;
  - other county and district level services;
  - sports and leisure facilities; and
  - emergency services.

b) Operational impacts

- employment: impact of additional employment in a high value added sector; and

- wider economic impacts: effects on skills, education, spending, and supply chain.

9.1.4 A standalone ES was prepared for the Sizewell B relocated facilities works for submission with the hybrid application under the Town and Country Planning Act 1990 (East Suffolk Council application ref. DC/19/1637/FUL). The Sizewell B relocated facilities ES (included in **Appendix 2A** of **Volume 1** of the **ES**) scoped out the assessment of socio-economic effects, as no potential for likely significant effects from the Sizewell B relocated facilities proposals on their own were identified. However, the assessment presented within this chapter also accounts for the effects of the Sizewell B relocated facilities project, as it forms part of the Sizewell C Project.

9.2 Structure of this chapter

9.2.1 The chapter is structured as follows:

- **Section 9.3** sets out the legislation, policy and other documentation that has informed the assessment. This includes national policy, including relevant national policy statements (NPS) that help set the

parameters to the assessment, and highlights areas of local policy that are considerations for the potential effects on communities within the study areas.

- **Section 9.4** sets out the methodology applied to the assessment, including: a summary of the responses to consultation that have informed the approach; the study areas; the datasets that have informed the baseline assessment; and the methodology applied to determine the assessment of the significance of the socio-economic effects.

- **Section 9.5** details the baseline conditions across the assessment study areas, against which the impacts will be assessed, including the population, economic and labour market baseline, accommodation baseline and community facilities baseline.

- **Section 9.6** describes the Sizewell C Project's embedded design and mitigation measures relevant to the assessment of socio-economic effects.

- **Section 9.7** sets out the assessment of effects during the construction and operational phases.

- **Section 9.8** describes the proposed mitigation and monitoring to address the potential adverse effects, and enhance the beneficial effects identified at **section 9.7**.

- **Section 9.9** concludes by setting out the likely residual effects of the Sizewell C Project, taking into account mitigation and monitoring described at **section 9.8.**

9.2.2 As detailed in **section 9.4** of this chapter, the approach to the socio-economic assessment has been informed by engagement with Suffolk County Council (SCC), and East Suffolk Council (ESC) (note ESC was formed following the merger of the former Suffolk Coastal District (SCDC) and Waveney District Councils (WDC)), as well as service providers and local stakeholders, and community groups. The assessment of effects has therefore been established through an iterative process of engagement and refinement.

9.2.3 This assessment has been informed by data from other assessments including:

- **Chapter 10** of **Volume 2** of the **ES**: Transport.

- **Chapter 28** of **Volume 2** of the **ES:** Health and Wellbeing.

9.2.4 This assessment has been informed by data presented in the following technical notes appended to the chapter:

- **Appendix 9A:** Technical Note 1: Workforce Profile.
- **Appendix 9B:** Technical Note 2: Demographic Benchmarks and Workforce Characteristics.
- **Appendix 9C:** Technical Note 3: Workforce Spatial Distribution.
- **Appendix 9D:** Technical Note 4: Accommodation Datasets and Assumptions.
- **Appendix 9E:** Technical Note 5: Sport and Leisure Audit and Estimated Demand.
- **Appendix 9F:** Sizewell C: Suffolk Coast Visitors Survey.

9.3 Legislation, policy and guidance

9.3.1 An overview of legislation, policy and guidance specifically of relevance to this socio-economic assessment is set out in **Appendix 6E** of **Volume 1** of the **ES.**

9.3.2 As stated in **Chapter 3** of **Volume 1** of the **ES**, the overarching NPS for Energy (Ref 9.1) when combined with the NPS for Nuclear Power Generation (Ref 9.2) provides the primary basis for decisions by the Secretary of State on applications for nuclear power generation developments such as this.

9.3.3 The NPSs for Energy Infrastructure set out government energy policy; the need for new infrastructure; and guidance in determining an application for a Development Consent Order (DCO). The NPSs include specific criteria and issues which should be covered by applicants' assessments of the effects of their scheme, and how the Planning Inspectorate should consider these impacts. They include specific references to socio-economic effects.

9.3.4 Notwithstanding this, the Secretary of State may consider other matters that are both important and relevant to decision-making. This could include national, regional and, local policy documents.

9.3.5 Further, the Planning Act 2008 provides that in making a decision on a nationally significant infrastructure project, regard must be made to any

local impact report prepared by relevant local authorities. It is anticipated that the local impact report would rely in part on national, regional and local policy to provide context. On this basis, and on the basis that such policy may contain information or be supported by evidence that is of relevance to this assessment, regard has been given to these documents (where relevant to the technical assessment).

a) Summary

9.3.6 A full summary of legislation, guidance and policy relevant to this assessment is included in **Appendix 6E** of **Volume 1** of the **ES.**

9.3.7 The policy review demonstrates there are a large number of policies at the national, regional and local levels relevant to the socio-economic assessment of the Sizewell C Project.

9.3.8 In order to meet the requirements of the Overarching National Policy Statement for Energy (NPS EN-1) (Ref 9.1) (paragraph 5.12.4), the review of legislation, policy and guidance seeks to capture the key policy areas covered which need to be addressed in the assessment.

9.3.9 This can be split into three categories:

- Process and Criteria Policies: are those which set out how the assessment should be undertaken, the weight given to different issues in the assessment, and how impacts should be addressed.
- Assessment of Impact and Mitigation: are those areas identified by policy makers in which the proposals at Sizewell C might have an impact, which, if negative, might require mitigation.
- Enhancement and Legacy: are those areas identified, predominantly in local policy, where potential positive impacts of the Sizewell C Project might be delivered in a way which could be enhanced to achieve wider policy objectives.

9.3.10 The distinction between the second and third categories is important in order to identify areas in which the applicant might be expected to minimise or mitigate impacts as a requirement, and those in which longer term partnership working might provide enhanced outcomes.

9.3.11 The following policy documents are considered in the context of the development of the baseline, assessment of effects, and design of mitigation for this assessment (these are set out in detail in **Appendix 6E** of **Volume 1** of the **ES**):

- Overarching National Policy Statement for Energy (NPS EN-1).
- National Policy Statement (NPS) for Nuclear Power Generation (NPS EN-6) (Ref 9.2).
- National Planning Policy Framework (NPPF) 2019 (Ref 9.3).
- Industrial Strategy, building a Britain fit for the future (November, 2017) (Ref 9.4).
- Industrial Strategy Nuclear Sector Deal (June 2018) (Ref 9.5).
- HM Government, Integrated Communities Strategy Green Paper (March 2018) (Ref 9.6).
- Local Industrial Strategy for Norfolk and Suffolk, New Anglia Local Enterprise Partnership (LEP) (2019) (Ref 9.7).
- The East Norfolk and Suffolk Economic Strategy, New Anglia LEP (November 2017) (Ref 9.8).
- Suffolk Growth Strategy, SCC (Ref 9.9).
- Transforming Suffolk, Suffolk's Community Strategy 2008-2028, Suffolk Strategic Partnership (June 2008) (Ref 9.10).
- Suffolk Coastal Final Draft Local Plan (January 2019) (Ref 9.11).
- Suffolk Coastal District Local Plan Core Strategy and Development Management Policies, SCDC (July 2013) (Ref 9.12).
- SCDC Leisure Strategy 2014-2024, SCDC (Ref 9.13).
- East Suffolk Means Business, East Suffolk Business Plan (2015-2023) (Ref 9.14).
- East Suffolk Economic Growth Plan, 2018-2023 (Ref 9.15).
- East Suffolk Tourism Strategy 2017-2022, ESC (Ref 9.16).
- East Suffolk Housing Strategy 2017-2023, ESC (Ref 9.17).

- Waveney Local Plan, East Suffolk Council, (Adopted March 2019) (Ref 9.18).

- Leiston Neighbourhood Plan 2015-2029, Leiston Neighbourhood Forum, (March 2017) (Ref 9.19).

9.4 Methodology

a) Scope of the assessment

9.4.1 The generic Environmental Impact Assessment (EIA) approach and methodology is detailed in **Chapter 6** of **Volume 1** of the **ES** (Doc Ref. 6.2).

9.4.2 This section provides an overview of the specific details of the socio-economic methodology applied to the assessment of the Sizewell C Project, and a summary of the general approach to provide appropriate context for the assessment that follows. The scope of assessment considers the impacts of the construction and operation phases of the Sizewell C Project.

9.4.3 **Appendix 6E** of **Volume 1** of the **ES** sets out details of the methodology.

9.4.4 The scope of this assessment has been established through a formal EIA scoping process undertaken with the Planning Inspectorate. A request for an EIA scoping opinion was initially issued to the Planning Inspectorate in 2014, with an updated request issued in 2019.

9.4.5 Comments raised in the EIA scoping opinion received in 2014 and 2019 have been taken into account in the development of the assessment methodology. These are detailed in **Appendices 6A** and **6C** of **Volume 1** of the **ES**.

b) Consultation and engagement

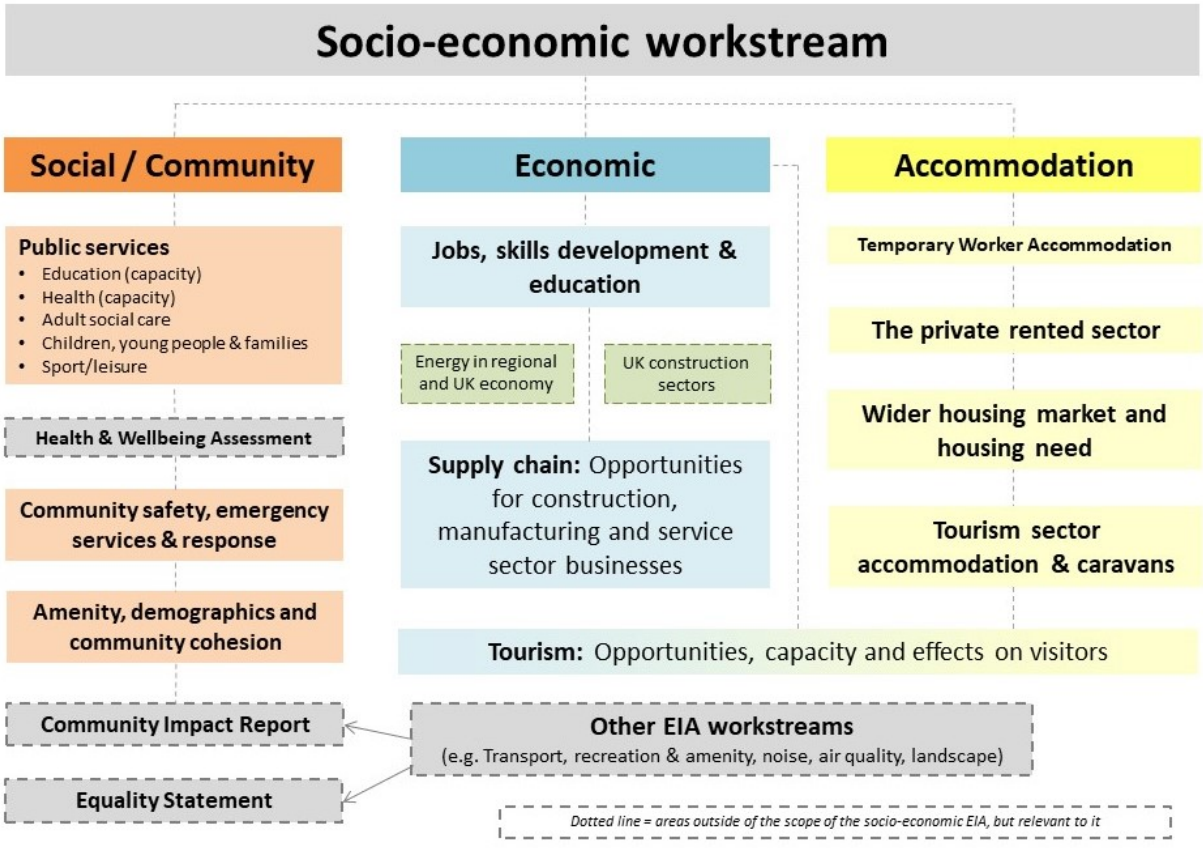
9.4.6 The scope of the assessment has also been informed by ongoing consultation and engagement with statutory consultees throughout the design and assessment process.

9.4.7 The **Consultation Report** (Doc Ref. 5.1) describes the full process which SZC Co. has carried out, the requirements for which are set out in primary and secondary legislation, including meetings held with ESC and SCC throughout the EIA process to discuss the scope of the assessment. A summary of the comments raised and SZC Co.'s responses are detailed in **Annexes A** to **H** to the **Consultation Report**.

9.4.8 The **Consultation Report** also identifies responses to comments made by individuals, statutory bodies and other organisations, and includes a socio-economic section, cross referenced with this chapter.

9.4.9 A series of formal socio-economic working groups, incorporating representatives from ESC and SCC and SZC Co. were established from 2013. The working groups have considered the Sizewell C Project assumptions and methodology adopted for the assessment, the approach to assessing effects and identifying critical issues, and the development of analysis leading to mitigation. Membership of the working groups has expanded to include other relevant stakeholders, including but not limited to local tourism and skills/educational organisations, the emergency services, and the NHS as the assessment has progressed. **Plate 9.1** sets out the approach to issues within the wider socio-economic workstream, which has influenced the working groups' membership and scope.

Plate 9.1: Components of the socio-economic workstream



9.4.10 A series of technical notes were prepared as part of this engagement and formal consultation process, and these are appended. The methodology, baseline and development of project assumptions is summarised in the following bullet points:

- **Appendix 9A** of this volume – this note sets out how the workforce is anticipated to change throughout the Sizewell C Project in terms of its size, components (e.g. skill levels), and the extent to which the workforce is home-based (HB) or non-home-based (NHB). It is based on information from Hinkley Point C, Sizewell B, and other projects, as well as early contractor involvement.

- **Appendix 9B** of this volume – this note sets out the anticipated demographic profile and other population characteristics of the workforce, based on 2011 Census data and other research from national industry bodies.

- **Appendix 9C** of this volume – this note describes how the workforce is anticipated to distribute geographically at the peak of construction activity, drawing on information from other technical notes in this list, and the Gravity Model (a 'distance decay' model based on workers' propensity to travel to work, informed by value of time estimates and the location of available accommodation).

- **Appendix 9D** of this volume – this note sets out the Sizewell C Project's assumptions about which accommodation sectors the NHB workforce is likely to live in, based on demand and supply aspects using research and public datasets, and experience from other projects.

- **Appendix 9E** of this volume – this note sets out the baseline for sport and leisure provision across the study area and describes the methodology and assessment for potential temporary demand for facilities from the NHB workforce, using guidance and methodology from Sport England.

c) Study areas

9.4.11 The spatial extent of the socio-economic assessment includes the main development site, all associated development sites, and the surrounding area, with administrative geographies defined by each socio-economic topic.

9.4.12 The precise areas used are partly influenced by data availability and, in some cases, also reflect the boundaries of relevant service planning areas, e.g. for school or health facilities.

9.4.13 The spatial scope of the socio-economic baseline studies therefore varies by impact category. Full details of the approach to defining study areas are

set out in **Appendix 6E** of **Volume 1** of the **ES**, and summarised in the following paragraphs.

9.4.14 **Figure 9.1** shows the following study areas in relation to the main development site:

- local wards (Leiston, Aldeburgh, Saxmundham, Aldeburgh and Yoxford);
- the ward-based 60-minute travel area (used for NHB workers);
- local authority areas within the 60-minute travel area; and
- the (90-minute) construction daily commuting zone (CDCZ) (used for HB workers).

9.4.15 Administrative geography is the primary scale at which baseline data from public datasets can be collected – this includes (from smallest/most local to largest/widest):

- Output Areas, Super Output Areas and Wards – used to define local areas where effects may occur at a sub-local authority scale such as localised housing or population changes.
- District and county level – these areas form the basis of the assessment of impacts on the local labour market (wider economic impacts), housing market, and public services.
- Regional level – this area forms the basis of sub-national economic and labour market effects in particular.
- National level – depending on the dataset, this could refer to the United Kingdom, Great Britain, or England, and is used to demonstrate the scale of effects, benchmarks, or changes from a wider average.

i. Workforce effects

9.4.16 Socio-economic effects are primarily related to the size, characteristics, and distribution of the construction workforce and whether that workforce is HB or NHB. As such, there are two ward-based assessment scales regularly used in this assessment. These are based on the Gravity Model, which includes inputs from the socio-economic assessments on the workforce profile, skills profile of the resident workforce, and accommodation location

and availability. It then, based on travel times, allocates the expected distribution of the construction workforce across defined travel areas:

- 60-minute travel time: This is a collection of wards within a defined 60-minute travel area from the main development site. It represents the estimated extent of daily travel to the construction site by NHB workers.

- CDCZ: The CDCZ is defined as the wards within an approximately 90-minute commute time of the main development site. The CDCZ is used primarily to define the local (HB) labour market for the construction phase. The definition of the CDCZ involves consideration of a range of factors which affect workers' willingness to commute, including time, distance, and travel allowances; plus findings from other studies of the mobility of UK construction workers.

9.4.17 Where data is not available at the ward-scale, best-fit local authority boundaries have been used.

9.4.18 A full description of detailed inputs to the determination of the 60-minute travel area and CDCZ is included in **Appendix 9A** of this volume, with specific elements covered in **Appendix 9C** and **Appendix 9D** of this volume, as well as in the **Transport Assessment** (Doc Ref 8.5).

ii. Accommodation study areas

9.4.19 Accommodation data is generally produced across all administrative geographies, though more recent and different datasets are available at a local authority scale.

9.4.20 Generally, accommodation effects are relevant to the local authority (district) scale as this is the level at which housing services and support for housing vulnerability is statutorily provided.

9.4.21 Accommodation effects are also influenced by the distribution of the workforce across the 60-minute travel area which allows for some analysis at local authority scale, and ward-based assessment of localised effects.

9.4.22 It is also relevant to have regard to other spatial scales including the Strategic Housing Market Area. The NPPF (Ref 9.3) requires local authorities to assess housing needs at this level, rather than at an individual local authority level, to ensure a sound needs assessment is provided. The Strategic Housing Market Area areas within the 60-minute travel area are therefore relevant when considering the accommodation impacts of the Sizewell C Project. There are two Strategic Housing Market Area areas within the 60-minute travel area – Ipswich (including Ipswich and Babergh,

Mid-Suffolk, and the former SCDC local authority areas), and Waveney (the former WDC local authority area only) zones.

iii. Economic study areas

9.4.23 Economic data is generally produced across all administrative geographies, though more recent and different datasets are available at a local authority scale.

9.4.24 Generally, economic effects are relevant to wider scales as this is the level at which labour markets operate and at which business services, skills provision, and education are planned for.

9.4.25 Economic effects are also influenced by the distribution of the workforce across the 60-minute travel area (in terms of the economic effects of NHB workers), and the CDCZ (in terms of employment supported for HB workers).

9.4.26 It is also relevant to consider potential effects with regard to other spatial scales such as the LEP. The New Anglia Local Enterprise Partnership (NALEP) is one of 38 LEPs across the country which are spatially defined partnerships between local authorities, public sector organisations, and business. LEPs aim to lead economic growth and job creation. NALEP covers the two counties of Norfolk and Suffolk, and sets economic objectives across this spatial area.

iv. Public services study areas

9.4.27 Public services are provided at different scales depending on the type of service. For this assessment, study areas include:

- District (ESC) scale – for the provision of local services including leisure and regulatory and environmental services.
- County (SCC) scale – for the provision of local services including education and social services and some emergency service provision (organisations providing services at this scale include SCC, Suffolk Constabulary and Suffolk Fire and Rescue Service).

9.4.28 There are also local study areas depending on the organisation of services and reporting of public information, for example, neighbourhood policing areas which are generally groups of wards.

v. Other relevant study areas

9.4.29 It is also relevant to consider potential effects with regard to other spatial scales:

- Effects on tourism may be relevant to consider at a range of scales depending on the nature of effects and the location of tourist sector accommodation and designations.

- Effects related to the operational workforce would be determined by the likely spatial distribution of the workforce, and the subsequent effect on the local and regional economies.

d) Baseline assessment

9.4.30 Baseline information has been identified through (see **Appendix 6E** of **Volume 1** of the **ES** for further details):

- Analysis of publicly-available demographic and economic datasets including nationally recognised data, and survey information obtained from the Office for National Statistics (ONS), and other Government departments including the Ministry of Housing, Communities and Local Government.

- Work undertaken through various accompanying technical notes, included as **Appendices 9A**–**9E** of this volume.

- Work on the Gravity Model which has been used to assess the spatial distribution of the workforce, undertaken jointly with the transport workstream. A full description of the model and its inputs is set out in the **Transport Assessment** (Doc Ref. 8.5).

- Consultation with appropriate statutory bodies.

- Review and audit of public services and community facilities, including education, and healthcare from relevant public data sources including The NHS Website and Annual School Census.

e) Assessment approach

9.4.31 The potential for significant socio-economic effects is primarily linked to the workforce profile, which sets out the change in employment required as a result of construction activity across the duration of the construction phase.

9.4.32 As such, assessments are presented, where appropriate, at the peak of construction workforce demand, representing the potential reasonable worst case effect on, for example, demand for accommodation and public services.

9.4.33 It is recognised that some effects may occur at different stages of the construction phase, that mitigation may require a lead-in time to ensure that it is effective, and that effects may be determined by the change in workforce over time compared to the components of the Sizewell C Project, such as project accommodation provision. Therefore, where appropriate, assessments are made in the context of annual change over the duration of the construction phase.

9.4.34 There would also be effects during the operational phase when construction is complete, for the lifetime of the Sizewell C Project, and these are assessed from completion of the construction phase.

f) Assessment criteria

9.4.35 As described in **Chapter 6** of **Volume 1** of the **ES**, the EIA methodology considers whether impacts of the proposed development would have an effect on any resources or receptors. Assessments consider broadly the magnitude of impacts and value/sensitivity of resources/receptors that could be affected in order to classify effects.

9.4.36 **Appendix 6E** of **Volume 1** of the **ES** sets out the approach to value, sensitivity and magnitude that combine to form the assessment of significance for socio-economic effects.

9.4.37 **Table 9.1** identifies those impacts where significance can be defined with reference to the baseline and quantitative indicators. Other qualitative assessments are based on professional judgement. They seek, so far as is possible, to identify quantitative criteria as to the level of change in relation to the current capacity of the area (for example for schools and accommodation), or in the context of current annual rates of turnover and change in population. This recognises the dynamic nature of the environment with which the Sizewell C Project would interact.

Table 9.1: Approach to assessment of significance for socio-economic effects

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
Economic Effects – Construction					
Home-based (HB) recruitment.	Adverse	No adverse effects are considered in terms of employment generation – all effects are considered to be beneficial in this regard (potential secondary effects on labour market churn are also considered).			
	Beneficial	HB employment equivalent to >10% of existing construction employment.	HB employment equivalent to 5% to 10% of existing construction employment.	HB employment equivalent to <5% of existing construction employment.	HB employment equivalent to <1% of existing construction employment.
Effects on unemployment and economic inactivity.	Adverse	No adverse effects are considered in terms of the effects of the Sizewell C Project on unemployment and economic activity – all effects are considered to be beneficial in this regard.			
	Beneficial	HB workforce drawn from unemployment represents >5% of current registered unemployed.	HB workforce drawn from unemployment represents 3% to 5% of current registered unemployed.	HB workforce drawn from unemployment represents <3% of current registered unemployed.	No workforce drawn from current unemployment/economic inactivity.
Effects on labour market churn and 'displacement'.	Adverse	Assessed qualitatively in the context of existing labour market churn in the construction sector.			
	Beneficial				
Business and supply chain.	Adverse	No adverse effects are considered in terms of the effects of the Sizewell C Project on business and the supply chain – all effects are considered to be beneficial in this regard.			
	Beneficial	Assessed qualitatively based on the potential for contract value to be secured.			
Wages/spending and additionality.	Adverse	No adverse effects are considered in terms of the effects of the Sizewell C Project on wages/spending and additionality – all effects are considered to be beneficial in this regard.			

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
	Beneficial	Assessed qualitatively based on the potential for net additional contribution to the economy of earning and expenditure.			
Effects on tourism economy.	Adverse	Assessed qualitatively based on the identification of potential perceived sensitivities to changes in visitor behaviour in the context of the existing visitor environment and characteristics of the Suffolk coast, and evidence of perceived effects versus observed effects elsewhere.			
	Beneficial				
Effects on agricultural economy.	Adverse	Agricultural land lost represents > 10% of agricultural land in Suffolk.	Agricultural land lost represents 5–10% of agricultural land in Suffolk.	Agricultural land lost represents 1–5% of agricultural land in Suffolk.	Agricultural land lost represents < 1% of agricultural land in Suffolk.
	Beneficial	Beneficial effects on the regional agricultural economy are not likely to arise as a result of the Sizewell C Project resulting in either no change or overall loss to the quantum of land in this sector, and have therefore not been considered in this assessment.			
Effects of transport on business.	Adverse	Assessed qualitatively based on a review of overall effects of the Sizewell C Project on the transport network, and the ability for potentially affected businesses to claim statutory compensation should they perceive they qualify for it.			
	Beneficial				
Accommodation Effects – Construction					
Tourist sector.	Adverse	Workforce demand exceeds 50% of available and affordable capacity at peak season.	Workforce demand exceeds 25% of available and affordable capacity at peak season.	Workforce demand exceeds 10% of available and affordable capacity at peak season.	Workforce demand is less than 10% of available and affordable capacity at peak season.
	Beneficial	Beneficial effects may occur where construction workforce has the potential to use otherwise vacant accommodation, particularly off—peak. This has been considered qualitatively, as it is likely to fluctuate between seasons, and is considered at the 60-minute area scale only.			
Private rented sector (PRS).	Adverse	Workforce demand exceeds 20% of overall stock or 100% of frictional vacancy needed for	Workforce exceeds 10% of overall stock or 50% of frictional vacancy needed for PRS to	Workforce demand is less than 50% of frictional vacancy needed for PRS to operate.	Workforce demand is less than 10% frictional vacancy needed for PRS to operate.

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
		PRS to operate.	operate.		
	Beneficial	Beneficial effects on the PRS are not considered in this assessment. The Sizewell C Project only has the potential to cause adverse effects due to the nature of demand for private rented accommodation. However, there may be long-term beneficial effects associated with mitigation strategies that leave legacy benefits in terms of the overall supply and quality of accommodation in the sector.			
Owner-occupied sector.	Adverse	> 50% of annual turnover of owner-occupied sector.	25–50% of annual turnover.	10–25% of annual turnover.	< 10% of annual turnover.
	Beneficial	Beneficial effects on the owner-occupied sector are not considered in this assessment, as the Sizewell C Project only has the potential to cause adverse effects due to the nature of demand for owner occupied accommodation.			
Population Dynamics – Construction					
Population change and dynamics.	--	Effect of new NHB workers represents >50% of annual average new residents.	Effect of new NHB workers represents 20% to up to 50% of annual average new residents.	Effect of new NHB workers represents 10% to up to 20% of annual average new residents.	Effect of new NHB workers represents less than 10% of annual average new residents.
Public Services – Construction					
Childcare and education.	Adverse	Effect of new population if additional means exceeding current capacity, where baseline levels were not already at or exceeding capacity.	Effect of new population if additional takes surplus capacity to within 5% of total capacity, or exceeds existing capacity by between 5% and 10% where baseline levels	Effect of new population if additional takes surplus capacity to within 10% of total capacity, or exceeds existing capacity by up to 5% where baseline levels were already at or exceeding	Effect of new population if additional means no change to within 10% of surplus capacity, or no change from baseline significance.

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
			were already at or exceeding capacity.	capacity.	
	Beneficial	Beneficial effects on the childcare and education sector are not likely to occur as a result of the Sizewell C Project, which will not lead to an alleviation of need for these services as a result of physical interventions or implementation strategies, and have therefore not been identified in this assessment.			
Social services.	Adverse	Assessed qualitatively – drawing on information from scheme design and implementation strategies such as the **Community Safety Management Plan** (Doc Ref. 8.16), Worker Code of Conduct**, Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9) and **Accommodation Strategy** (Doc Ref. 8.10) supplemented by review of potential risks/issues identified through engagement related to project-wide effects.			
	Beneficial	Beneficial effects on the social care sector are not likely to occur as a result of the Sizewell C Project, which will not lead to an alleviation of need for these services as a result of physical interventions or implementation strategies, and have therefore not been identified in this assessment.			
Other county-level services.	Adverse	Assessed qualitatively based on the potential for NHB construction workers to create net additional demand for services in the context of their demographic characteristics, accommodation choices, locations and duration of residence.			
	Beneficial	Beneficial effects on other county level services are not likely to occur as a result of the Sizewell C Project, which will not lead to an alleviation of need for these services as a result of physical interventions or implementation strategies, and have therefore not been identified in this assessment.			
Formal sports and leisure.	Adverse	Unmet demand for additional formal sports and leisure facilities as a result of the construction workforce equivalent to whole facilities being needed, or a contribution to new facilities (considered qualitatively, informed by published standards of demand).			No, or imperceptible impact on demand for or supply of formal sports and leisure provision.
	Beneficial	The Sizewell C Project will deliver sports facilities that both meet the needs of workers and provide additional	The Sizewell C Project will deliver sports facilities that both meet the needs of workers and provide	The Sizewell C Project will deliver sports facilities that meet the needs of workers and help to attract a high-quality	No, or imperceptible impact on demand for or supply of formal sports and leisure provision.

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
		community resource in an area or sector of existing deficiency.	additional community resource.	workforce.	
Regulatory and environmental services.	Adverse	Proportion of NHB workforce in non-council-tax accommodation represents >10% increase in population at District level.	Proportion of NHB workforce in non-council-tax accommodation represents 5% to 10% increase in population at District level.	Proportion of NHB workforce in non-council-tax accommodation represents 2% to 5% increase in population at District level.	Proportion of NHB workforce in non-council-tax accommodation represents <2% increase in population at District level.
	Beneficial	Beneficial effects on regulatory and environmental services are not likely to occur as a result of the Sizewell C Project, which will not lead to an alleviation of need for these services as a result of physical interventions or implementation strategies, and have therefore not been identified in this assessment.			
Crime and policing.	Adverse	Potential estimated increase of more than 20% in crime rates per 1,000 population.	Potential estimated increase of between 10% and 20% in crime rates per 1,000 population.	Potential estimated increase of between 1% and 10% in crime rates per 1,000 population.	Potential estimated increase of up to 1% in crime rates per 1,000 population.
	Beneficial	Assessed qualitatively – drawing on information from scheme design and implementation strategies such as the **Community Safety Management Plan** (Doc Ref. 8.16), supplemented by review of potential risks/issues identified through engagement related to project-wide effects.			
Fire service.	Adverse	Assessed qualitatively – drawing on information from **Transport Assessment** (Doc Ref. 8.5) and scheme design and implementation, supplemented by review of potential risks/issues identified through engagement related to project-wide effects.			
	Beneficial	Assessed qualitatively – drawing on information from **Transport Assessment** (Doc Ref. 8.5) and scheme design and implementation that could improve service provision in the long-term.			

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
Community cohesion and integration.	Adverse	Assessed qualitatively using national government definitions of community cohesion, integration, and sustainability.			
	Beneficial				
Operational Effects					
Local direct employment.	Adverse	No adverse effects are considered in terms of employment generation – all effects are considered to be beneficial in this regard.			
	Beneficial	Employment equivalent to >20% of existing employment in energy generation sector.	Employment equivalent to 10% to 20% of existing employment in energy generation sector.	Employment equivalent to 1% to 10% of existing employment in energy generation sector.	Employment equivalent to <1% of existing employment in energy generation sector.
Local indirect employment/economic effects.	Adverse	No adverse effects are considered in terms of local indirect employment generation and economic effects – all effects are considered to be beneficial in this regard.			
	Beneficial	Assessed qualitatively based on the potential for net additional contribution to the economy of earning and expenditure.			
Business and supply chain.	Adverse	No adverse effects are considered in terms of business and supply chain effects – all effects are considered to be beneficial in this regard.			
	Beneficial	Assessed qualitatively based on the potential for contract value to be secured locally.			
PRS	Adverse	Workforce demand exceeds 20% of overall stock or 100% of frictional vacancy needed for PRS to operate.	Workforce exceeds 10% of overall stock or 50% of frictional vacancy needed for PRS to operate.	Workforce demand is less than 50% of frictional vacancy needed for PRS to operate.	Workforce demand is less than 10% frictional vacancy needed for PRS to operate.
	Beneficial	Beneficial effects on the PRS are not considered in this assessment, as the Sizewell C Project only has the potential to cause adverse effects due to the nature of demand for private rented accommodation during the operational phase.			

Impact	Beneficial/Adverse	Major	Moderate	Minor	Negligible
Owner-occupied sector.	Adverse	> 50% of annual turnover of owner-occupied sector.	25–50% of annual turnover.	10–25% of annual turnover.	> 10% of annual turnover.
	Beneficial	Beneficial effects on the owner-occupied sector are not considered in this assessment, as the Sizewell C Project only has the potential to cause adverse effects due to the nature of demand for owner occupied accommodation.			
Net additional demand for public services.	Adverse	Assessed qualitatively considering the net additionality of operational workforce and their contribution to service delivery through general taxation.			
	Beneficial	Beneficial effects on public services are not likely to occur as a result of the Sizewell C Project, which will not lead to an alleviation of need for these services as a result of physical interventions or implementation strategies, and have therefore not been identified in this assessment.			
Population change, community cohesion and integration.	Adverse	Assessed qualitatively using national government definitions of community cohesion, integration and sustainability, and considering the annual rate of additional residents as a result of the NHB portion of the operational workforce.			
	Beneficial				

9.4.38 Following the classification of an effect as presented in **Table 9.1**, a clear statement is made as to whether the effect is 'significant' or 'not significant'. As a general rule, major and moderate effects are considered to be significant and minor and negligible effects are considered to be not significant. However, professional judgement is also applied where appropriate.

g) Assessment methodology

9.4.39 The assessment of likely significant socio-economic effects within the study areas has been undertaken by reference to the likely changes from the baseline conditions, and the effects of those changes as a result of the Sizewell C Project.

9.4.40 The assessment has considered the following potential effects.

i. Economic effects

9.4.41 The economic effects of the Sizewell C Project are primarily driven by the demand for goods from the supply chain and for services in terms of contracts and labour recruitment to deliver the Sizewell C Project. These are informed by:

- the overall value of the Sizewell C Project; and
- the mix of contract packages required over the construction phase in terms of supply chain and employment.

9.4.42 Labour market effects are considered in terms of the demand for local employment, and the benefits that demand brings to existing labour markets and in terms of the amount of NHB labour brought into the region for the Sizewell C Project. These influence the economy in terms of skills demands, productivity, effects on unemployment and economic inactivity, expenditure and additionality effects[1].

9.4.43 Jobs supported by the Sizewell C Project directly would result in changes to employment levels in the local employment structure. These would depend on both the demands of the Sizewell C Project at different points in the construction phase, and associated policies, but there is likely to be a major increase in local employment/opportunities. There would also be a multiplier effect with indirect (e.g. local supplier firms) and induced (e.g.

[1] Net positive difference that results from economic development intervention. The extent to which an activity (and associated outputs, outcomes and impacts) is larger in scale, at a higher quality, takes place more quickly, takes place at a different location, or takes place at all as a result of intervention. Additionality measures the net result, taking account of deadweight, leakage, displacement, substitution and economic multipliers.

local service jobs) effects from the Sizewell C Project. There may also be some labour market churn as some employees move into roles on or associated with the Sizewell C Project from other local employers.

9.4.44 Primarily, employment effects are considered in terms of their value relative to the existing construction economy and labour market, levels of unemployment and economic inactivity and labour market churn, and output/productivity.

9.4.45 This chapter also considers the wider economic effects of the Sizewell C Project including the proportion and estimated value of local supply chain benefits and secondary benefits from employee spending.

9.4.46 In addition, the chapter looks at effects on other sectors – primarily:

- tourism: considering potential sensitivities that may affect peoples' perceptions of the area with the potential to lead to changes in visitor behaviour; and

- agriculture: in terms of loss of land, and therefore agricultural activity supporting jobs. Effects on severance or changes to landholdings affecting businesses (accounting for any proposed mitigation that SZC Co. would undertake) is assessed in **Chapter 17** of this volume (Doc Ref. 6.3) for the main development site and **Chapter 10** of **Volumes 3-9,** (Doc. Ref. 6.4-6.10) for associated developments.

ii. Accommodation effects

9.4.47 The effects of the Sizewell C Project on accommodation and housing markets are driven by the number and location of NHB workers associated with the project, and the types of accommodation they are likely to stay in. The assessment considers the effects on:

- Owner-occupied accommodation: potential for increased demand for family-type owner-occupied homes in the local area from long-term construction workforce and operational workers.

- Private rented accommodation: potential for increased demand for private rented accommodation from the NHB workforce, and particularly where there may be effects related to the lower 30th percentile of the sector where tenants may be in housing need, or in receipt of housing benefits, or otherwise vulnerable to ending of tenancy.

- Tourist accommodation: potential for increased demand for tourist accommodation from NHB workforce.

iii. Public services, community and demographics

9.4.48 The effects of the Sizewell C Project on the population, community facilities, and public services are driven by the number and location of NHB workers throughout the construction phase (as set out in the workforce profile), and their demographic and characteristics. This influences how they may be anticipated to create additional demand for services/facilities. The assessment considers:

- Population/demographic change: changes in the local population level and structure. For example, there is likely to be a large NHB and male population during the construction phase, a proportion of whom could be accompanied by families; there would be smaller numbers with a longer term presence during the operational phase.

- Impact on local social conditions and associated services: project-related demographic changes have the potential to adversely impact on local social conditions and associated services. For example, a non-home-based construction workforce may have the potential to lead to a change in demand for local healthcare facilities, school and policing services which could create possible issues for the local population (e.g. impact on school places, crime in the community; traffic flows/noise).

- Other less tangible socio-cultural change: changes in the level and structure of employment and demographic changes could have the potential to affect quality of life, community character/cohesion and integration. Parts of the local community may be differently affected by the development, or there could be a shift in the character of some communities (especially those close to the main development site or on key transport routes to the Sizewell C Project).

h) Assumptions and limitations

9.4.49 Project assumptions and limitations have been set out in:

- **Appendix 6E** of **Volume 1** of the **ES**; and

- technical notes appended to this chapter – **Appendices 9A**–**9E.**

9.4.50 In summary, these assumptions and limitations include:

- assumptions about the duration and phasing of the Sizewell C Project and its associated development, acknowledging internal and external uncertainties such as the political and economic climate;
- the size, profile, and characteristics of the construction workforce;
- the recruitment of the workforce and the extent to which it would be HB and NHB;
- the accommodation likely to be used by the NHB workforce;
- the operational workforce; and
- limitations related to datasets (representing a 'snapshot' in time) and the approach to dynamism of the baseline.

i. Core assumptions

9.4.51 The Sizewell C Project's transport and socio-economic effects are influenced by two core assumptions about the construction workforce:

- the number of workers required over time, by skill/role, and the extent to which they can be sourced from existing labour markets (HB) or would temporarily move to the area (NHB); and
- the spatial distribution of workers (by accommodation type) across the area.

9.4.52 The first assumption is driven by the Workforce Profile – details of which are set out in **Appendix 9A** of this volume and summarised in **Figure 9.2** and **Figure 9.3**.

9.4.53 This sets out that this assessment uses a workforce profile peaking at 7,900 workers – this is a precautionary approach to ensure that appropriate mitigation can be applied.

9.4.54 Both core assumptions are driven by the gravity model and accommodation assumptions – details of which are set out in **Appendix 9A, Appendix 9C** and **Appendix 9D** of this volume.

9.4.55 Throughout this assessment, the effects of these combined assumptions are considered in terms of their influence on the significance of effects on the economy and labour market, accommodation and public services.

ii. Definitions

9.4.56 Throughout this assessment reference is made to a number of different terms relating to the Sizewell C Project's workforce, defined in order to adequately inform the assessment of effects. The following terms are defined here:

- Workers: In line with standard practice, a 'worker' is defined using the 'five day rule' – meaning people who spend at least five days working on the site in a given month. This enables the distinction of workers who may generate the potential for socio-economic effects e.g. on housing or public services from visitors. This therefore does not include 'visitors' to the site (see below). There may be up to 7,900 workers at peak.

- Visitors: Occasional visitors to the site for work, not meeting the definition of a worker (see above) and therefore not likely to generate the potential for socio-economic effects – though likely to contribute to transport effects.

- Associated development workers: This refers to the operational staff at associated development sites – up to 600 at peak including operation of the facilities within the on-site accommodation campus.

- Employment years: It is not possible to identify in detail the length of each contract for each skill type required. One way of representing the employment – and headline economic effects – supported by the construction phase of the Sizewell C Project is to consider how many years of employment would be needed overall across the workforce profile. Overall, based on standard working hours, the Sizewell C Project would support around 40,000 years of employment throughout the construction phase of the Sizewell C Project. This does not mean that there would be 40,000 'jobs' – contracts will be of varying lengths. SZC Co. will seek to re-utilise people through different roles in order to promote sustainable careers and efficient working.

- Non-home-based workers: Workers who retain a home address outside of the 60-minute area, but move to the area temporarily (likely returning home between working periods) in a range of short-medium term accommodation.

- Home-based workers: Workers who already live within 90-minutes of the site.

- Workers on-site: For clarity, this assessment does not consider the total number of workers on-site at any given time. While this is an important distinction for transport assessments, the definition of 'workers' above is more relevant for considering impacts on socio-economic receptors.

9.5 Baseline environment

9.5.1 This section describes the socio-economic baseline for the Sizewell C Project, including a summary of key characteristics of the local area's socio-economic baseline, including demographic, economy and employment, accommodation, education, health and leisure facilities.

a) Current baseline

i. Population and population density

9.5.2 The six local authorities closest to the site (East Suffolk, Great Yarmouth, Ipswich, Babergh, Mid Suffolk and South Norfolk) (the 'immediate districts') have a combined population of 817,100 (ONS, mid-year population estimates, 2018). East Suffolk's population comprises just under one third of the total (248,200).

9.5.3 The largest settlements in the immediate districts are Ipswich and Felixstowe to the south of the area, and Lowestoft and Great Yarmouth to the north.

9.5.4 Of the six immediate districts, four are predominantly rural, and the area as a whole has a low population density (2.1 residents per hectare (ha)). Across the 60-minute travel area (which does not extend to the urban areas of Ipswich and Great Yarmouth), population density is very low at 1.6 residents per ha).

9.5.5 In the five wards surrounding the main development site there are 19,470 residents living at a low density of 1.2 people per ha.

9.5.6 **Table 9.2** summarises the total population and population density in the immediate districts, the 60-minute travel area and the CDCZ, and in the wards surrounding the site.

Table 9.2: Population and population density

Area	Population Estimates 2018	Area Size (ha)	Population Density
Local Wards			
Leiston	6,515	2,512	2.6

Area	Population Estimates 2018	Area Size (ha)	Population Density
Saxmundham	5,765	3,030	1.9
Snape	1,982	3,871	0.5
Yoxford	2,022	5,473	0.4
Aldeburgh	3,183	1,764	1.8
Districts			
Great Yarmouth	99,370	17,419	5.7
South Norfolk	138,017	90,771	1.5
East Suffolk	248,249	126,125	2.0
*Suffolk Coastal**	129,938	*89,156*	1.5
*Waveney**	118,311	*36,968*	3.2
Mid Suffolk	102,493	87,107	1.2
Ipswich	137,532	3,941	34.9
Babergh	91,401	59,378	1.5
Study Area.			
60-minute travel area	320,861	206,159	1.6
CDCZ (90-minute travel area)	1,776,727	792,074	2.2
Wider Scales.			
Norfolk	903,680	537,056	1.7
Suffolk	758,556	380,018	2.0
East	6,201,214	1,910,838	3.2
England	55,977,178	13,027,843	4.3

Source: ONS, mid-year population estimates, 2019

** Suffolk Coastal and Waveney have since combined to form East Suffolk District*

ii. Age and gender profile

9.5.7 The immediate districts have higher proportions of older people, and lower proportions of working age people, compared with the national average. This disparity is particularly striking in East Suffolk district where 27% of residents are aged 65 and over compared to a regional average of 19% and 18% nationally. This is outlined in **Table 9.3**.

9.5.8 This trend is reflected across the 60-minute travel area where 27.1% of residents are aged 65 and over, and 55.9% are working age (aged 16–64). Across the CDCZ, which incorporates a number of larger urban areas, the proportion of working-age residents is closer to the national average (59.4% of CDCZ residents compared to 62.6% national average).

9.5.9 The gender split across the 60-minute and CDCZ areas is in line with averages for the East of England and nationally – with slightly higher proportions of females (51%) compared to males (49%) across all areas. This is broadly the case across the immediate districts, although there are some variations at lower spatial scales.

Table 9.3: Age profile

Area	% Children (0–15)	% Working Age (16–64)	% Older People (Age 65+)	Gender (M:F)
Local Wards				
Leiston	16.5%	57.7%	25.8%	49:51
Saxmundham	19.4%	54.6%	26.0%	47:53
Snape	14.0%	53.2%	32.8%	47:53
Yoxford	11.6%	47.6%	40.8%	48:52
Aldeburgh	10.0%	44.9%	45.1%	45:55
Districts				
Great Yarmouth	17.8%	58.0%	24.2%	49:51
South Norfolk	18.1%	58.0%	24.0%	49:51
East Suffolk	16.9%	55.9%	27.1%	49:51
*Suffolk Coastal**	16.7%	56.0%	27.3%	49:51
*Waveney**	17.2%	55.9%	26.9%	48:52
Mid Suffolk	16.9%	58.8%	24.3%	49:51
Ipswich	20.3%	63.2%	16.4%	50:50
Babergh	17.0%	57.0%	26.0%	49:51
Study Area				
60-Minute Travel Area	17.0%	56.4%	26.6%	49:51
CDCZ (90-Minute Travel Area)	17.6%	59.4%	23.0%	49:51
Wider Scales				
Norfolk	16.9%	58.8%	24.3%	49:51
Suffolk	18.1%	58.7%	23.2%	49:51
East	19.4%	61.0%	19.6%	49:51
England	19.2%	62.6%	18.2%	49:51

Source: ONS, mid-year population estimates, 2019.

iii. Recent population growth

9.5.10 The population of the immediate districts increased by an estimated 27,500, or 3.5%, over the five years between mid-2013 (ONS, 2014) and mid-2018 (ONS, 2014). This rate of population growth is below the East of England (4.2%) and national (3.9%) averages shown in **Table 9.4**. Within this area, population growth has been highest in South Norfolk (an increase of 10,300 or 8.1%). The population of East Suffolk grew by 6,800 (2.8%) over the same period. Recent population growth in the five wards surrounding the main development site was approximately 1,100 or 6.0%.

Table 9.4: Population growth, 2013–18

Area	2013 Population	2018 Population	Growth
Local Wards			
Leiston	6,331	6,515	2.9%
Saxmundham	4,988	5,765	15.6%
Snape	1,888	1,982	5.0%
Yoxford	1,986	2,022	1.8%
Aldeburgh	3,176	3,183	0.2%
Districts			
Great Yarmouth	97,736	99,370	1.7%
South Norfolk	127,682	138,017	8.1%
East Suffolk	241,426	248,249	2.8%
*Suffolk Coastal**	125,212	129,938	3.8%
*Waveney**	116,214	118,311	1.8%
Mid Suffolk	98,431	102,493	4.1%
Ipswich	135,604	137,532	1.4%
Babergh	88,704	91,401	3.0%
Other Scales			
60-minute travel area	311,564	320,861	3.0%
CDCZ (90-minute travel area)	1,703,064	1,776,727	4.3%
Wider Scales			
Norfolk	870,296	903,680	3.8%
Suffolk	735,844	758,556	3.1%
East	5,951,934	6,201,214	4.2%
England	53,865,817	55,977,178	3.9%

Source: ONS, mid-year population estimates, 2014 and 2019.

iv. Migration

9.5.11 The latest statistics on internal migration flows at local authority area level are shown in **Table 9.5** for mid-2017 to mid-2018 (ONS, 2019 – local area migration indicators). This shows an annual net inflow of around 4,764 people into the immediate districts, including 2,176 into East Suffolk district.

Table 9.5: Internal migration flows (within the UK): immediate districts

Area	Migration into Area	Migration from Area	Migration Net Flow
Districts			
Great Yarmouth	4,286	4,132	150
South Norfolk	9,899	7,369	2,530
East Suffolk	12,416	9,980	2,440
*Suffolk Coastal**	*7,129*	*5,690*	*1,439*
*Waveney**	*5,287*	*4,290*	*997*
Mid Suffolk	6,063	5,219	840
Ipswich	6,593	7,822	-1,230
Babergh	5,430	4,730	700
Wider Scales			
Norfolk	31,566	26,131	5,440
Suffolk	26,814	23,359	3,460
East	176,465	167,656	8,810
England	99,676	118,100	-18,424

Source: ONS local area migration indicators, 2019.

9.5.12 The population at all scales is dynamic and mobile. Approximately 11% of people move either within, to or from the District area each year, compared to 12% across England (Census, 2011).

9.5.13 National Insurance number registrations for foreign national adults in the immediate districts rose by 17% between 2014 and 2019 (Department for Work and Pensions (DWP), 2019). However, the rise was focused in Ipswich where there was a 66% increase in registrations; there was also a small (3%) rise in South Norfolk, while all other districts saw a fall in registrations – as shown in **Table 9.6.**

9.5.14 These numbers do not track whether migrants become permanent residents or the duration of their stay. Many would be temporary seasonal

workers. However, in the context of the annual migration figures described above they still form a minority of migration to the area.

Table 9.6: National insurance number registrations for foreign national adults

Area	Year to March 2014	Year to March 2019	% Change
East Suffolk	660	650	-2%
*Suffolk Coastal**	*368*	*471*	*28%*
*Waveney**	*292*	*179*	*-39%*
Great Yarmouth	852	656	-23%
Ipswich	1,436	2,386	66%
Mid Suffolk	168	148	-12%
Babergh	295	206	-30%
South Norfolk	336	346	3%

Source: DWP, 2014; DWP, 2019.

v. Baseline dynamics

9.5.15 A baseline study has been conducted to identify the turnover in population and jobs at a local scale using Census Moving Groups (2011) analysis for population turnover and by applying average job turnover for the UK (Organisation for Economic Co-operation and Development, 2015) to the surveyed jobs (Business Register and Employment Survey, 2019). Turnover is shown in **Table 9.7**.

Table 9.7: Population and jobs turnover

Area	% New Residents in 2011	Total New Residents 2011	Jobs Turnover Estimate at 15–20% (per year)
Local Wards.			
Leiston	5.8%	370	390–520
Saxmundham	8.8%	432	280–380
Snape	9.0%	172	50–60
Yoxford	9.7%	185	110–150
Aldeburgh	9.1%	293	210–280
Districts			
East Suffolk	4.2%	10,068	13,710–18,280
*Suffolk Coastal**	*6.3%*	*7,849*	7,670 – 10,230
*Waveney**	*6.2%*	*7,120*	6,040 – 8,050

Area	% New Residents in 2011	Total New Residents 2011	Jobs Turnover Estimate at 15–20% (per year)
Ipswich	5.6%	7,513	10,750–14,340
Great Yarmouth	3.3%	3,241	5,560–7,420
South Norfolk	5.7%	7,016	8,070–10,760
Mid Suffolk	5.4%	5,242	5,390–7,190
Babergh	5.3%	4,688	4,840–6,460
Other Scales			
60-minute travel area	8.2%	25,179	15,960–21,280
CDCZ (90-minute travel area)	10.1%	170,437	109,204–145,610

Source: Census Moving Groups 2011; BRES, 2019.

9.5.16 The high level of dynamism could be linked to the strength of tourist and agricultural economies in the area, which rely extensively on a seasonal and migratory workforce.

9.5.17 This dynamism means the local area is able to cope with outages every 18 months or so at the existing Sizewell B station. Outages can have a substantial NHB workforce of in the region of 850 workers (out of approximately 1,000 total outage workers). These are absorbed by the local accommodation market without significant difficulties.

vi. Employment

9.5.18 The latest employment estimates for the immediate districts are for 2018, published in 2019 (BRES, 2019). At that time, there were an estimated 321,000 employee jobs across the immediate districts, although total employment including self-employed jobs was somewhat higher, at an estimated 337,000. Just over one quarter of employee jobs (around 91,500) were located in East Suffolk. Employee jobs across the 60-minute travel area are estimated at 106,000. Across the CDCZ there are an estimated 728,000 employee jobs, which represent approximately one quarter of all employee jobs across the East of England (2.8 million jobs).

9.5.19 The main concentrations of employment within the immediate districts are located in the main urban centres of Ipswich, Great Yarmouth, Felixstowe and Lowestoft, as shown in **Table 9.8**.

Table 9.8: Employment estimates

Area	Employee Jobs (2019)	Total Employment (2019)
Local Wards		
Leiston	2,500	2,500
Saxmundham	2,000	2,000
Snape	300	350
Yoxford	700	800
Aldeburgh	1,500	1,500
Districts		
Great Yarmouth	37,000	38,000
South Norfolk	54,000	57,000
East Suffolk	91,500	96,000
*Suffolk Coastal**	51,000	54,000
*Waveney**	40,500	42,000
Mid Suffolk	36,000	38,000
Ipswich	71,500	73,000
Babergh	32,500	34,000
Other Scales		
60-minute travel area	106,000	111,000
CDCZ (90-minute travel area)	728,000	753,000
Wider Scales		
Norfolk	368,000	388,000
Suffolk	323,000	339,000
East	2,781,000	2,880,000
England	25,976,000	26,842,000

Source: BRES, 2019.

9.5.20 BRES estimates, shown in **Table 9.9**, indicate relatively strong employee jobs growth in the East of England over the last six years (15.0% growth) and England as a whole (11.7% growth). Growth across the 60-minute travel area (11.5%) and the CDCZ (10.6%) has been below the national average. In East Suffolk there has been an increase of 5,000 (5.8%) in the number of employee jobs. In the wards surrounding the site, the proportional change in numbers of jobs has been more volatile, reflecting the much smaller number of jobs in these areas. Taking the five wards together, there has been an overall increase in the number of employee jobs of 900 jobs (14.8% change).

Table 9.9: Estimated employee job growth

Area	Employee Jobs (2012)	Employee Jobs (2018)	% Change
Local Wards			
Leiston	2,500	2,500	0.0%
Saxmundham	1,500	2,000	33.3%
Snape	400	300	-25.0%
Yoxford	450	700	55.6%
Aldeburgh	1,250	1,500	20.0%
District			
Great Yarmouth.	37,000	37,000	0.0%
South Norfolk.	47,000	54,000	14.9%
East Suffolk.	86,000	91,000	5.8%
Suffolk Coastal.*	*47,000*	*51,000*	*8.5%*
*Waveney**	*39,000*	*40,000*	*2.6%*
Mid Suffolk.	33,000	35,000	6.1%
Ipswich	65,000	72,000	10.8%
Babergh	30,000	32,000	6.7%
Other Scales			
60-minute travel area	96,000	107,000	11.5%
CDCZ (90-minute travel area)	658,000	728,000	10.6%
Wider Scales			
Norfolk	337,000	368,000	9.2%
Suffolk	295,000	323,000	9.5%
East	2,419,000	2,781,000	15.0%
England	23,256,000	25,976,000	11.7%

Source: BRES, 2013; BRES, 2019.

9.5.21 **Table 9.10** provides a more detailed breakdown of recent employment change in the immediate districts by broad industry sector. The figures include only employee jobs and exclude self-employed workers. Employment growth over the six years 2012-2018 was focused in the health (6,000 jobs); professional, scientific and technical (4,000 jobs); and arts, entertainment, recreation and other services (3,000 jobs) sectors. Employment losses were experienced in a number of sectors, including most significantly education (-1,000 jobs), and manufacturing (-2,000 jobs).

Table 9.10: Employment change by industry sector, immediate districts

Sector	Employee Estimates (2012)	Employee Estimates (2018)	Growth
Agriculture, forestry & fishing	5,000	5,000	0.0%
Mining, quarrying & utilities	5,000	7,000	40.0%
Manufacturing	31,000	29,000	-6.5%
Construction	15,000	17,000	13.3%
Motor trades	6,000	8,000	33.3%
Wholesale	10,000	11,000	10.0%
Retail	32,000	33,000	3.1%
Transport & storage (inc. postal)	20,000	21,000	5.0%
Accommodation & food services	23,000	26,000	13.0%
Information & communication	8,000	9,000	12.5%
Financial & insurance	7,000	8,000	14.3%
Property	3,500	3,500	0.0%
Professional, scientific & technical	17,000	21,000	23.5%
Business administration & support services	19,000	20,000	5.3%
Public administration & defence	13,000	13,000	0.0%
Education	27,000	26,000	-3.7%
Health	45,000	51,000	13.3%
Arts, entertainment, recreation & other services	11,000	14,000	27.3%

Source: BRES, 2013; BRES, 2019.

9.5.22 **Table 9.11** provides a sector breakdown of recent employment change in East Suffolk. The largest sectors in the area are retail (11,000 jobs), health (9,000 jobs), and manufacturing (10,000 jobs).

Table 9.11: Employment change by industry sector, East Suffolk

Sector	Employment Estimates (2013)	Employment Estimates (2019)	Growth
Agriculture, forestry & fishing	3,500	3,500	0.0%
Mining, quarrying & utilities	1,500	1,750	16.7%
Manufacturing	10,000	10,000	0.0%

Sector	Employment Estimates (2013)	Employment Estimates (2019)	Growth
Construction	4,000	4,500	12.5%
Motor trades	2,000	2,250	12.5%
Wholesale	2,500	2,500	0.0%
Retail	11,000	11,000	0.0%
Transport & storage (inc postal)	10,000	10,000	0.0%
Accommodation & food services	8,000	9,000	12.5%
Information & communication	4,000	4,000	0.0%
Financial & insurance	800	800	0.0%
Property	900	1,000	11.1%
Professional, scientific & technical	4,500	6,000	33.3%
Business administration & support services	5,000	4,000	-20.0%
Public administration & defence	3,500	3,500	0.0%
Education	8,000	8,000	0.0%
Health	9,000	9,000	0.0%
Arts, entertainment, recreation & other services	3,500	4,500	28.6%

Source: BRES, 2013; BRES, 2019.

9.5.23 The structure of employment in the immediate districts differs in a number of respects from the national average, with lower representation in professional, scientific and technical activities, business administration and support services, and education.

9.5.24 **Table 9.12** shows employment sectors under-represented in the local economy include information and communication (2.8% of jobs compared to 4.4% nationally), financial and insurance (2.5% compared to 3.5% nationally), professional, scientific and technical (6.5% compared to 9.0% nationally) and education (8.1% compared to 8.9% nationally).

9.5.25 Within this overall picture, there are differences in the importance of specific sectors between East Suffolk, and the immediate districts. East Suffolk has larger proportions of jobs in manufacturing (10.8% of jobs), retail (11.9%), transport and storage (10.8%), accommodation and food services (9.7%), and information and communication jobs (4.3%). East Suffolk has smaller proportions of jobs in financial and insurance (0.9%), business administration and support (4.3%), and health (9.7%).

Table 9.12: Employee jobs by industry sector

Sector	East Suffolk		Immediate Districts		England	
	Jobs	%	Jobs	%	Jobs	%
Agriculture, forestry & fishing (A).	1,750	1.9%	5,000	1.6%	157,000	0.6%
Mining, quarrying & utilities (B, D and E).	1,750	1.9%	7,000	2.2%	315,000	1.2%
Manufacturing (C).	10,000	10.8%	29,000	9.0%	2,082,000	8.0%
Construction (F).	4,000	4.3%	17,000	5.3%	1,202,000	4.6%
Motor trades (Part G).	2,250	2.4%	8,000	2.5%	470,000	1.8%
Wholesale (Part G).	2,500	2.7%	11,000	3.4%	1,084,000	4.2%
Retail (Part G).	11,000	11.9%	33,000	10.2%	2,429,000	9.4%
Transport & storage (inc postal) (H).	10,000	10.8%	21,000	6.5%	1,279,000	4.9%
Accommodation & food services (I).	9,000	9.7%	26,000	8.1%	1,936,000	7.5%
Information & communication (J).	4,000	4.3%	9,000	2.8%	1,150,000	4.4%
Financial & insurance (K).	800	0.9%	8,000	2.5%	902,000	3.5%
Property (L).	900	1.0%	3,500	1.1%	453,000	1.7%
Professional, scientific & technical (M).	6,000	6.5%	21,000	6.5%	2,325,000	9.0%
Business administration & support services (N).	4,000	4.3%	20,000	6.2%	2,388,000	9.2%
Public administration & defence (O).	3,500	3.8%	13,000	4.0%	1,030,000	4.0%
Education (P).	8,000	8.7%	26,000	8.1%	2,312,000	8.9%
Health (Q).	9,000	9.7%	51,000	15.8%	3,306,000	12.7%
Arts, entertainment, recreation & other services (R, S, T and U).	4,000	4.3%	14,000	4.3%	1,156,000	4.5%

Source: BRES, 2019.

9.5.26 Suffolk labour supply in the construction sector is in similar proportions to national and regional supply. There were around 17,000 employee jobs in the construction sector in the immediate districts in 2018, plus a further 5,500 employee jobs in the related activities of architecture, engineering and technical consultancy. These estimates exclude self-employed jobs.

9.5.27 It is important to distinguish between data which includes self-employment, and that which does not because self-employment is very important in the construction sector, due to contractors and sub-contractors not employing people directly. The breakdown of employment (not including self-employment) in construction and related activities (civil engineering and specialist construction activities) is presented in **Table 9.13**.

Table 9.13: Employment in construction and related activities

Area	Construction of Buildings (Standard Industrial Classification (SIC) 41)	Civil Engineering (SIC 42)	Specialised Construction Activities (SIC 43)
Districts			
East Suffolk	1,700	500	2,500
*Suffolk Coastal**	1,000	300	1,250
*Waveney**	700	200	1,250
Great Yarmouth	400	175	1,000
South Norfolk	800	700	1,750
Mid Suffolk	800	2,000	1,500
Ipswich	800	800	1,250
Babergh	600	225	1,000
Other Scales			
60-minute travel area	2,400	700	3,100
CDCZ (90-minute travel area)	11,400	5,600	20,000
Wider Scales			
Norfolk	6,000	2,500	12,000
Suffolk	5,000	3,500	9,000
East	52,000	23,000	90,000
England	406,000	180,000	693,000

Source: BRES, 2019.

9.5.28 Compared with the national average, the immediate districts have a lower proportion of residents in professional and associated professional and technical occupations (31% compared with a national average of 36%) (Annual Population Survey, 2019). However, the proportion of residents in skilled manual trades (12%) is slightly above the national average (10%). The proportion of residents employed in personal service, sales and customer service occupations (11%) is also higher than the national

average (9%). These trends are similar, but more pronounced in East Suffolk, as shown in **Table 9.14**.

Table 9.14: Residents in employment by occupation

Occupational Group	East Suffolk	Immediate Districts	England
Managers, directors and senior officials.	10.3%	11.1%	11.1%
Professional occupations.	15.6%	17.6%	20.9%
Associate prof & tech occupations.	12.1%	13.3%	15.0%
Administrative and secretarial occupations.	11.5%	11.2%	10.1%
Skilled trades occupations.	12.8%	11.9%	9.9%
Caring, leisure and other service occupations.	11.7%	11.0%	8.9%
Sales and customer service occupations.	8.8%	7.6%	7.4%
Process, plant and machine operatives.	5.3%	5.6%	6.3%
Elementary occupations.	11.8%	10.7%	10.4%

Source: APS, 2018.

vii. Business and enterprise

9.5.29 There were approximately 36,600 active businesses in the immediate districts in 2018 (Business Counts, 2018). This figure includes both VAT-registered and PAYE-based enterprises. Business density, at 77 businesses per 1,000 working-age adult residents, is similar to the national average (79) shown in **Table 9.15**. Recent growth in the number of businesses in the immediate districts (12% overall) was below the national average (21%). However the rate has varied across districts. Growth in Ipswich was highest (19%), while growth in Great Yarmouth (6%), Babergh (7%), and Mid Suffolk (8%) was significantly slower.

9.5.30 There were 3,225 new business registrations in the immediate districts during 2017. This represents an annual rate of 6.8 new registrations per 1,000 working-age residents, which is below the national average (9.9). The latest data on business survival rates in the immediate districts shows that the proportion of new businesses surviving for at least three years (63%) is higher than the national average (59%).

Table 9.15: Business stock, density and growth

Area	Active Businesses 2018	Businesses per 1,000 Working-Age Residents	Growth in Businesses 2013–18
Districts			
East Suffolk	11,150	79	1,230
Great Yarmouth	3,600	61	210
South Norfolk	6,370	85	890
Mid Suffolk	5,430	91	400
Ipswich	5,400	62	850
Babergh	4,620	87	320
Wider Scales			
England	2,697,200	79	462,900

Source: Business Counts 2013; Business Counts 2018.

viii. Economic activity, unemployment and worklessness

9.5.31 Employment rates across the immediate districts (77%) are generally higher than the average across England (75.4%), in line with the rate across the East of England (78.0%) (Annual Population Survey, 2019). However there is some variation in working age employment rates across the immediate districts, ranging from an estimated 65.1% in Great Yarmouth to 79.2% in South Norfolk as shown in **Table 9.16**. However, these district-level figures are based on relatively small samples and should be treated with caution.

Table 9.16: Working Age Employment Rates (16–64)

Area	Residents in Employment	Working-Age Residents	Employment Rate
Districts			
Great Yarmouth	36,400	55,900	65.1%
South Norfolk	60,400	76,300	79.2%
East Suffolk	105,000	134,800	77.9%
Suffolk Coastal	*57,600*	*70,300*	*81.9%*
Waveney	*47,400*	*64,500*	*73.5%*
Mid Suffolk	45,300	58,400	77.6%
Ipswich	68,300	87,400	78.1%
Babergh	40,700	51,700	78.7%

Area	Residents in Employment	Working-Age Residents	Employment Rate
Wider Scales			
Norfolk	395,000	523,800	75.4%
Suffolk	343,500	437,700	78.5%
East	2,932,300	3,759,800	78.0%
England	26,169,200	34,728,600	75.4%

Source: Annual Population Survey (ONS, 2019)

9.5.32 Claimant count data (2019) (Department for Work and Pensions, 2019) is an experimental dataset that measures the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit, and are required to seek work and be available for work. It is not considered to be a national statistic.

9.5.33 Claimant count rates across the immediate districts vary in comparison with the national average (2.8%) shown in **Table 9.17**. Rates in South Norfolk (1.4%), Mid Suffolk (1.4%) and Babergh (1.7%) are lower than the national average, whereas rates are relatively high in Ipswich (3.4%), East Suffolk (2.4%) and Great Yarmouth (4.6%). There are currently 3,335 claimants across the 60-minute travel area (1.8% of working age residents), and 24,270 (2.3% of working age residents) across the CDCZ.

Table 9.17: Claimant count data, September 2019

Area	Unemployed Claimants	% Working Age Residents
Local Wards		
Leiston	75	2.0%
Saxmundham	65	2.2%
Snape	10	1.1%
Yoxford	15	1.8%
Aldeburgh	10	0.8%
Districts		
Great Yarmouth.	10	4.6%
South Norfolk.	1,150	1.4%
East Suffolk.	3,385	2.4%
Suffolk Coastal.	960	1.3%
Waveney	2,435	3.7%
Mid Suffolk.	860	1.4%
Ipswich	3,000	3.4%

Area	Unemployed Claimants	% Working Age Residents
Babergh	885	1.7%
Other Scales		
60-minute travel area	3,335	1.8%
CDCZ (90-minute travel area)	24,270	2.3%
Wider Scales		
Norfolk	11,510	2.2%
Suffolk	10,040	2.3%
East	80,920	2.1%
England	978,890	2.8%

Source: ONS 2019.

ix. Income

9.5.34 The Annual Survey of Hours and Earnings (ASHE, 2019) provides median gross earnings data for full-time workers at local authority level. Data is available for both residents of a spatial area, and workers employed in each area. Resident-based data is shown in **Table 9.18**, and workplace data is in **Table 9.19**.

9.5.35 In 2019, median gross annual earnings for workers and residents across the immediate districts were generally below the East of England and England medians (£31,878 for residents and £30,345 for workers across the East of England versus and £30,661 for residents and £30,667 for workers across England).

9.5.36 Across most of the immediate districts, growth in residents' earnings over the ten years from 2009–2019 was higher than the average growth across England (17.3%). Median workplace-based earnings were below the national average (17.3%) in Great Yarmouth (15.8%), South Norfolk (13.6%), Ipswich (14.5%) and Babergh (10.8%).

Table 9.18: Residents – median earnings (full-time workers)

Area	2009	2019	% Growth
Districts			
Great Yarmouth.	£21,569	£25,943	20.3%
South Norfolk.	£25,206	£30,396	20.6%
East Suffolk.	#	£29,666	#
Suffolk Coastal.	*£27,215*	#	#

Area	2009	2019	% Growth
Waveney	*£24,370*	#	#
Mid Suffolk.	£24,999	£29,401	17.6%
Ipswich	£22,606	£28,162	24.6%
Babergh	£25,659	£31,722	23.6%
Wider Scales			
East	£27,303	£31,878	16.8%
England	£26,145	£30,661	17.3%

 # - Figures suppressed within ASHE. Source: ASHE 2009; ASHE 2019

Table 9.19: Workplace – median earnings (full-time workers), 2018

Area	2009	2019	% Growth
Districts			
Great Yarmouth	£24,559	£28,439	15.8%
South Norfolk	£25,379	£28,818	13.6%
East Suffolk	#	£29,950	#
*Suffolk Coastal**	*£27,881*	#	#
*Waveney**	*£22,940*	#	#
Mid Suffolk	£22,143	£28,908	30.6%
Ipswich	£23,468	£26,867	14.5%
Babergh	£23,065	£25,567	10.8%
Wider Scales			
East	£25,500	£30,345	19.0%
England	£26,133	£30,667	17.3%

 # - Figures suppressed within ASHE. Source: ASHE, 2009; ASHE, 2019.

x. Skills and qualifications

9.5.37 The proportion of working age residents in the immediate districts with at least Level 2 qualifications (GCSE qualification at Grade C (or equivalent) or higher) (84%) is lower than the proportions across the East of England (86%) and England as a whole (87%) shown in **Table 9.20**. There are variations across the districts, with a relatively low proportion of Great Yarmouth residents with at least Level 2 qualifications (77%) and higher proportions in Mid Suffolk (91%) and South Norfolk (also 91%).

9.5.38 The proportion of working age residents in the immediate districts with at least Level 3 qualifications (A Level qualification (or equivalent) or higher)

(57%) is also lower than the proportions across the East of England (62%) and England (65%).

9.5.39 Across England, 44% of working-age residents have Level 4 (degree level (or equivalent) or higher) qualifications – this is higher than the proportions across the East of England (39%) and the immediate districts (34%).

9.5.40 Across all spatial scales, proportions of working-age residents with Level 2, 3, and 4 qualifications or higher has increased over the 10 years 2008–2018.

Table 9.20: Qualifications of working age residents (16–64), 2008 and 2018

Area	% Qualified at Level 2+ (2008)	% Qualified at Level 3+ (2008)	% Qualified at Level 4+ (2008)	% Qualified at Level 2+ (2018)	% Qualified at Level 3+ (2018)	% Qualified at Level 4+ (2018)
Districts						
Great Yarmouth	68%	35%	12%	77%	49%	12%
South Norfolk	79%	55%	27%	91%	64%	43%
East Suffolk	77%	49%	21%	85%	53%	35%
Suffolk Coasta.	*80%*	*52%*	*25%*	*85%*	*55%*	*40%*
Waveney	*73%*	*46%*	*16%*	*85%*	*50%*	*29%*
Mid Suffolk	73%	46%	24%	91%	68%	44%
Ipswich	70%	45%	17%	82%	55%	31%
Babergh	74%	44%	24%	84%	61%	34%
Other Scales						
East	76%	51%	28%	86%	62%	39%
England	78%	55%	32%	87%	67%	44%

Source: Annual Population Survey, 2008; APS 2018.

9.5.41 Data on GCSE exam attainment for the 2017/18 academic year is available at county level (Department for Education, 2018), as shown in **Table 9.21**. Attainment in Suffolk and Norfolk is generally below East of England averages in terms of the proportion of pupils gaining nine to five or nine to four passes in Maths and English. Attainment in Suffolk, Norfolk and the East of England is generally higher than the average across England as a whole, with the exception of the proportion of pupils in Norfolk gaining nine to five passes in Maths and English (39.3% compared to 39.9% across England as a whole).

Table 9.21: GCSE exam attainment levels

Area	% Pupils Gaining 9–5 Pass in Maths and English	% Pupils Gaining 9–4 Pass in Maths and English
Suffolk	41.1%	63.8%
Norfolk	39.3%	62.0%
East	43.6%	65.1%
England	39.9%	59.1%

Source: Department for Education, 2018.

xi. Tourist economy

9.5.42 SZC Co. has been working with stakeholders to understand the value and volume of tourism in the area. Tourism is notoriously difficult to define, and is inherently flexible – its economic effects are influenced by environmental and economic characteristics, seasonality and many other variables.

9.5.43 An Economic Impact Report has been produced for the Destination Management Organisation (DMO) by Destination Research (2018) (Ref 9.20) for the Suffolk Coast and Heaths Area of Outstanding Natural Beauty (AONB). It presents information on visitor numbers, expenditure, and an estimate of the number of jobs supported by this and indirect/induced expenditure in different sectors. The report finds that in 2017 the Suffolk Coast and Heaths AONB:

- attracted over 4.1 million trips, of which over 90% were day trips;
- generated over £164 million of direct spend, and over £45 million indirect/induced value; and
- supported 3,400 full-time equivalent jobs.

9.5.44 The same assessment was also undertaken at (Suffolk) county-level in 2017 which found that Suffolk (Ref 9.21):

- attracted over 35 million trips, of which 95% were day trips;
- generated over £1.4bn of direct spend, and over £595m indirect/induced value; and
- supported over 31,000 full-time equivalent jobs.

9.5.45 Public datasets may also be used to estimate the number of jobs in 'tourism' sectors (Ref 9.22). On this basis, Suffolk (county) has around

34,100 tourism-sector jobs (full and part time), making up 10.1% of all jobs in Suffolk in 2018. This is set out in **Table 9.22**.

Table 9.22: Jobs in tourist sectors

Area	Tourist Sector Jobs	All Jobs	% Tourist Sector Jobs
Local Wards			
Leiston	300	2,500	12.0%
Saxmundham	200	2,000	10.0%
Snape	100	350	28.6%
Yoxford	200	800	25.0%
Aldeburgh	600	1,500	40.0%
Districts			
Great Yarmouth	7,700	38,000	20.3%
South Norfolk	4,400	57,000	7.7%
East Suffolk	11,600	96,000	12.1%
*Suffolk Coastal**	6,100	54,000	11.3%
*Waveney**	5,500	42,000	13.1%
Mid Suffolk	2,800	38,000	7.4%
Ipswich	6,300	73,000	8.6%
Babergh	3,500	34,000	10.3%
Other Scales			
Norfolk	43,600	388,000	11.2%
Suffolk	34,100	339,000	10.1%
England	2,845,900	26,842,000	10.6%
Norfolk	43,600	388,000	11.2%

Source: BRES, 2019.

xii. Land use and agricultural economy

9.5.46 Agricultural land accounts for a total of approximately 330,000ha in Suffolk, and an estimated 10,000 jobs in 2018 (BRES, 2019).

Accommodation

9.5.47 A detailed review of accommodation stock, including overall stock, potential change in stock since the 2011 Census, occupancy, vacancy, turnover and capacity assessments are set out in **Appendix 9D** of this volume.

9.5.48 The following section summarises the potential capacity of accommodation, drawing on a more detailed assessment in **Appendix 9D** of this volume. This has involved careful consideration of the potential scale of accommodation available in four sectors:

- tourist accommodation;
- PRS;
- owner-occupied sector; and
- latent accommodation: accommodation that is either new or not currently included in records of tourist or private rented accommodation, because it has been out of use, or has not sought registration.

Tourist sector

Overall stock

9.5.49 There is a large supply of tourist sector accommodation across the 60-minute area, most of which is concentrated in urban areas or within coastal areas. The stock of accommodation in the area is diverse in terms of the type of service provided and the price per night/booking.

9.5.50 **Table 9.23** sets out the stock of tourist accommodation (by bedroom) using data provided by Visit East Anglia (2012) (Ref 9.23).

Table 9.23: Bedspaces in tourist accommodation

	Total	Serviced	Non-serviced		
		Hotels and Similar	Self-Catering	Caravan and Campsites	Other e.g. Holiday Parks, Hostels
Local Wards					
Leiston	**333**	29	9	295	–
Saxmundham	**423**	29	79	315	–
Snape	**411**	15	151	45	200
Yoxford	**605**	131	197	277	–
Aldeburgh	**1,691**	341	806	544	–
Districts					
Great Yarmouth	**19,003**	3,752	380	4,916	9,955
South Norfolk	**1,533**	949	332	176	76

	Total	Serviced	Non-serviced		
		Hotels and Similar	Self-Catering	Caravan and Campsites	Other e.g. Holiday Parks, Hostels
East Suffolk	**19,670**	2,526	3,644	4,151	9,350
*Suffolk Coastal**	***10,057***	*1,287*	*2,225*	*2,266*	*4,279*
*Waveney**	***9,613***	*1,239*	*1,419*	*1,885*	*5,071*
Mid Suffolk.	**1,393**	800	393	200	–
Ipswich	**986**	986	–	–	–
Babergh	**1,550**	1,167	350	33	–
Other Scales					
60-minute Area.	**26,276**	6,255	4,300	5,645	10,076

Source: Visit East Anglia, 2012.

9.5.51 Data is also produced at a local authority scale by Visit Britain as part of their Accommodation Stock Audit (latest data 2016) (Ref 9.24). While this cannot be used to inform the Gravity Model (which requires local-level data to run), it provides some context for the wider stock by sector. **Table 9.24** summarises the overall stock by sector (bedspaces) for Suffolk (county) and East Suffolk (district). It should be noted that due to different categorisation of accommodation, the two datasets are not directly comparable.

Table 9.24: Bedspaces in tourist sector accommodation

	Total	Serviced	Non-serviced		
		Hotels and Similar	Holiday Dwellings	Tourist Campsites	Other Collective Accommodation
East Suffolk (district)	**11,005**	4,168	4,262	2,512	63
Suffolk (county)	**20,620**	12,233	5,302	2,989	96

Source: Visit Britain, 2016.

Availability and affordability

9.5.52 Room occupancy rates for tourist accommodation are produced monthly by Visit England at a regional scale through the England Occupancy Survey (2019) (Ref 9.25). A review of this information for the East of England region from 2016–2019 suggests occupancy ranges from 63% in the Winter (January) to 85% in the peak of Summer (July/August). Occupancy tends to exceed 80% for four to five months of the year.

9.5.53 Applied to the above datasets, this suggests that:

- there may be between 1,600 (peak) up to 7,300 (off peak) unoccupied bedspaces in ESC depending on the data sources and assumptions; and

- there may be between 3,100 (peak) and 9,700 (off-peak) unoccupied bedspaces in the 60-minute area depending on the data sources and assumptions.

9.5.54 A significant amount of tourist accommodation would not be affordable to Sizewell C construction workers. By sector, SZC Co. has assumed that:

- 85% of serviced accommodation would not be affordable for workers;

- in most areas, 90% of self-catering accommodation would be affordable to workers (though SZC Co. note through engagement with The Suffolk Coast DMO that there is likely to be considerable local variation in price between areas); and

- while all caravan accommodation is likely to be affordable, planning restrictions for the year-round use of caravans for construction workers reduces the potential for availability – engagement with local authorities suggests this could reduce availability to workers by 50%.

9.5.55 **Table 9.25** applies these discounts to the overall stock identified in **Table 9.23**, with the effect of reducing the overall stock that is anticipated to be available and affordable to workers by over 60%.

Table 9.25: Bedspaces in tourist accommodation

Geography	Total	Serviced	Non-serviced		
		Hotels and Similar	Self-Catering	Caravan and Campsites	Other e.g. Holiday Parks, Hostels
Local Wards					
Leiston	160	4	8	148	–
Saxmundham	233	4	71	158	–
Snape	161	2	136	23	–
Yoxford	335	20	177	139	–
Aldeburgh	1,049	51	725	272	–
Districts					
Great Yarmouth	3,363	563	342	2,458	–
South Norfolk	529	142	299	88	–

Geography	Total	Serviced	Non-serviced		
		Hotels and Similar	Self-Catering	Caravan and Campsites	Other e.g. Holiday Parks, Hostels
East Suffolk	5,734	379	3,280	2,076	–
*Suffolk Coastal**	3,329	193	2,003	1,133	–
*Waveney**	2,405	186	1,277	943	–
Mid Suffolk.	574	120	354	100	–
Ipswich	148	148	–	–	–
Babergh	507	175	315	17	–
Other Scales					
60-minute area	7,631	938	3,870	2,823	–

Source: Visit East Anglia, 2012.

Private rented sector

9.5.56 The 2011 Census identifies that there are over 99,000 private rented bedrooms in the 60-minute area, within 42,000 homes. The distribution of these bedspaces across the area varies substantially, with more and a greater proportion (of all bedspaces) in urban areas.

9.5.57 **Table 9.26** sets out the total number of private rented bedspaces within the 60-minute area and East Suffolk district as at the 2011 Census.

Table 9.26: Homes and bedrooms in the private rented sector based on 2011 census data

Geography	Total Homes	Total Rooms
Local Wards		
Leiston	478	1,124
Saxmundham	289	728
Snape	132	351
Yoxford	132	326
Aldeburgh	216	543
Districts		
Great Yarmouth	7,605	17,101
South Norfolk	6,752	16,752
East Suffolk	16,295	38,755
*Suffolk Coastal**	*8,065*	*19,723*

Geography	Total Homes	Total Rooms
*Waveney**	*8,230*	*19,032*
Mid Suffolk.	5,157	12,930
Ipswich	12,092	26,732
Babergh	5,451	13,405
Other Scales		
60-minute area	42,030	99,033

Source: Census, 2011.

9.5.58 The PRS has changed substantially since 2011 Census data was collected. By applying the increases evidenced above from the English Housing Survey (Ref 9.26) and relevant Strategic Housing Market Assessments, it is reasonable to assume that the 2011 Census underestimates the stock of PRS homes and rooms across East Suffolk, and the 60-minute area by up to 11,600 and 29,700 bedrooms respectively.

Vacancy

9.5.59 The Ipswich Housing Market Area Strategic Housing Market Area Update (2019) (Ref 9.27) states that the vacancy rate in Suffolk Coastal is around 8.3%. This is defined using 2011 Census data for homes that are empty and those that are used as second homes. A vacancy rate of 6.9% is presented for Waveney within the Ipswich and Waveney Housing Market Areas Strategic Housing Market Assessment Volume 2 (2017) (Ref 9.28).

9.5.60 However, there is a significant difference between tenures especially where the market requires a certain level of vacancy to operate efficiently. Average (national) vacancy rates in the PRS over the last ten years, as recorded by the English Housing Survey, suggest vacancy rates of around 10.3% – this includes properties that are empty or available to let, or away from the market for the short, medium, or long-term.

Turnover/Churn

9.5.61 The English Housing Survey sets out that average annual churn rate in the PRS (households moving within, in or out of the sector in a given year) averages at 31.8% over the last ten years in England. This equates to 2.7% of all properties turning over in each month.

9.5.62 Evidence from the 2011 Census[2] indicates an annual churn of around 29% of private rented households in Suffolk Coastal and 27% in Waveney (those households in the districts in the PRS who moved in the last year), which appears about average for districts in the UK.

9.5.63 In Suffolk Coastal, around 8.2% of PRS households moved into dwellings in the district in 2011, and in Waveney around 6% of PRS households moved into dwellings in the district in 2011.

9.5.64 Average turnover of the PRS in East Suffolk wards in 2011 (Census) was around 35% (or 2.8% per month).

'Frictional Vacancy'

9.5.65 The level of vacancy can be combined with the average level of turnover to estimate the 'frictional vacancy'. This is the level of vacancy that the sector is assumed to need to operate effectively at any point in time. This is based on the assumption that frequent movements within and in/out of this sector need to be facilitated by a level of on-going vacancy. Overall, in East Suffolk, annual turnover is around 35%, and so monthly turnover is likely to be around 2.8% on average (see above). Vacancy in the PRS is estimated at between 6.9% and 10.3% (see above). Subtracting the monthly turnover rate from the overall vacancy gives an average frictional vacancy rate for East Suffolk of between 4.1% and 7.5%.

9.5.66 This level of frictional vacancy can be estimated at a local level (i.e. ward), and provides a benchmark for the level of on-going vacancy that the sector has at any point in time.

Owner-occupied sector

9.5.67 The 2011 Census identifies that there were 134,427 family homes (3+ bedrooms) in the owner-occupied sector across the 60-minute area in 2011. Since then the private housing sector has grown by approximately 4% in Suffolk, so this is considered an under-estimate.

9.5.68 **Table 9.27** sets out the total number of family-size (3+ bedroom) owner-occupied homes in 2011 (Census) across the relevant study areas:

[2] This data only refers to 'wholly moving households' i.e. one where all members of the household have moved from the same address. A partly moving household is where one or more members of the household have moved in the last year but not all members have moved from the same address. Partly moving households in the PRS sector accounted for an additional 8.7% of all PRS households. Overall, 4.4% of all households in Suffolk Coastal were formed in 2011 as a result of partially moving. These are additional to wholly moving households.

Table 9.27: Homes and rooms in family-size (3+ bedroom) owner-occupied homes

Geography	Total Homes
Local Wards	
Leiston	1,339
Saxmundham	1,107
Snape	518
Yoxford	520
Aldeburgh	952
Districts	
Great Yarmouth.	18,719
South Norfolk.	31,191
East Suffolk.	55,858
*Suffolk Coastal**	30,240
*Waveney**	25,618
Mid Suffolk.	23,527
Ipswich	25,869
Babergh	20,968
Other Scales	
60-minute area.	134,427

Source: Census, 2011.

Latent accommodation sector

9.5.69 Latent accommodation includes 'un-rated' tourist accommodation, rooms for let in private homes, currently empty homes, and accommodation new to the market each year.

9.5.70 Based on 2011 Census data for occupancy rating (using a conservative assessment – considering that any home with a '+2' occupancy rating has at least one spare bedroom), there were over 1,000 spare bedrooms in Leiston alone. **Table 9.28** sets out the number of empty bedrooms across the study areas in 2011 by tenure.

Table 9.28: Estimated unoccupied bedrooms by tenure based on occupancy rate

Geography	Owner-Occupied (Bedrooms)	Social Rented (Bedrooms)	Private Rented (Bedrooms)
Local Wards			
Leiston	830	37	81
Saxmundham	875	81	109
Snape	865	51	80
Yoxford	407	20	51
Aldeburgh	445	11	42
Districts			
Great Yarmouth	11,967	760	1,030
South Norfolk	22,228	594	1,787
East Suffolk	39,745	1,550	3,407
*Suffolk Coastal**	*22,372*	*678*	*1,929*
*Waveney**	*17,373*	*872*	*1,478*
Mid Suffolk	16,622	488	1,373
Ipswich	15,735	1,467	1,693
Babergh	15,100	629	1,304

Source: Census, 2011.

9.5.71 The Ministry of Housing, Communities and Local Government Live Table 615 (ONS, 2019) identifies that as at October 2018 there are 3,257 vacant properties in ESC (SCDC and WDC). Of these, 1,130 are 'long-term' vacants – meaning that these dwellings have been unoccupied and substantially unfurnished for over six months.

9.5.72 Waveney has 73 local authority-owned vacant properties, and across East Suffolk there are 56 general needs vacant properties owned by Private Registered Providers.

xiii. Education

9.5.73 This section discusses primary and secondary education services. Information is included on current pupil numbers in local schools and the numbers of surplus school places within the 60-minute travel area.

9.5.74 Information is also included at the end of the section on other education provision, including pre-school and nursery provision and post-16 education.

Primary education

9.5.75 **Table 9.29** sets out data on pupil numbers and school capacities for all maintained schools within the 60-minute travel area. In total there were 22,434 pupils on roll in 121 primary schools within this area in the school year 2018/19 (DfE, 2019). Based on Planned Admission Numbers, total capacity of these schools is 25,416 places. There were 3,123 surplus places in the area – equivalent to 12% of existing primary school capacity.

9.5.76 Data provided by SCC (October 2019) (Ref 9.29) sets out school capacity and surplus data forecast across Suffolk in 2023/24. **Table 9.29** also shows forecast surpluses in study areas within SCC (based on surplus compared to 100% capacity). Data is included for all schools other than Witnesham Primary School (East Suffolk) and Somersham Primary school (Mid Suffolk).

9.5.77 Comparing SCC 2023/24 forecasts to Annual School Census data shows growth in pupil numbers at Leiston ward primary schools of 142 pupils (102 due to demographic growth, and 40 related to housing growth). It is noted that this does not include additional capacity provided by planning obligations related to new housing development.

Table 9.29: Primary school capacity

Geography	Net Capacity (all year groups)	Pupils on Roll (January 2019)	Surplus Places	% Surplus Capacity	Net Capacity (SCC)	Forecast pupils on Roll 2023/24 (SCC)	Forecast Surplus Places 2023/24 (SCC)	Forecast % Surplus Capacity 2023/24 (SCC)
Local Wards								
Leiston	525	391	165	26%	560	533	27	5%
Saxmundham	483	445	38	8%	483	460	23	5%
Snape	175	145	30	17%	175	173	2	1%
Yoxford	175	104	71	41%	173	142	31	18%
Aldeburgh	105	103	2	0%	105	104	2	1%
Districts (geographic areas within 60-minute area)								
Great Yarmouth.	840	789	51	6%				
South Norfolk.	2,828	2,418	419	14%				
East Suffolk.	15,650	13,718	2,014	12%	15,876	13,954	1,922	12%
Mid Suffolk.	4,411	3,917	537	11%	4,363	4,291	72	2%
Ipswich	840	836	6	0%	832	861	-29	-3%
Babergh	182	173	9	5%	182	194	-12	-7%
Other Scales								
60-minute area.	25,416	22,434	3,123	12%				

Sources: Department for Education, 2019; SCC Directory of Schools in Suffolk for the 2020/21 school year (Ref 9.30); Norfolk County Council Primary and Infant Schools in Norfolk 2019/20 (Ref 9.31).

9.5.78 Surplus places are unevenly distributed across local primary schools. Some schools have significant numbers of surplus places; others are operating close to or above current capacity.

9.5.79 SCC's Education and Learning Infrastructure Plan (Version 3.0) (2017) (Ref 9.32) considers where there would be a need for more school places in Suffolk in the future. The document sets out expected growth in primary school numbers of 4% over the five years following the date the report was published (2017). Within this growth 'hotspots' are identified in Ipswich, north Lowestoft and Forest Heath.

9.5.80 Based on ONS 2014-based sub-national population projections, the report projects that the rise in demand for primary school places occurring at the time of reporting is expected to level out and then decline towards the mid-2020s.

9.5.81 The report lists a number of proposed school expansions and new schools to meet demand for spaces, including the following across the 60-minute area:

- Mid Suffolk – Potential expansion of Bosmere Primary, Chilton Primary, Trinity CEVA, and St Peter & St Paul, and potential new schools in Stowmarket (Cedars Park and Chilton Leys).

- East Suffolk – expansion of Sir Robert Hitchams CEVC Primary, Saxmundham Primary, Rendlesham Community Primary, Martlesham Primary, Cedarwood Primary, Oulton Broad Primary (if required), and potential new schools at Martlesham (Adastral Park), Felixstowe/Trimley St Martin and St Marys, Wood Meadow and Lake Lothing.

9.5.82 Norfolk County Council's Children's Services Committee published school place planning information in March 2019 (Ref 9.33) relating to the need to meet demand generated by Sustainable Urban Extensions across the County. Within the 60-minute travel area, the following primary school expansions and new schools are proposed to meet projected demand for places:

- South Norfolk – potential new two or three form entry primary school in Long Stratton.

Secondary education

9.5.83 **Table 9.30** sets out data on pupil numbers and school capacities for all secondary schools within the 60-minute travel area. There are 22 secondary schools within the 60-minute travel area. Total capacity in these

schools is 19,817 places (based on Suffolk and Norfolk County Councils School Admission Documents). Pupil numbers in these schools totalled 17,596 in January 2019 based on Department for Education Annual School Census data. There are 2,453 surplus places in the area, representing around 12% of existing capacity.

9.5.84 Data provided by SCC (October 2019) (Ref 9.29) sets out school capacity and surplus data forecast across Suffolk in 2023/24. **Table 9.30** shows forecast surpluses (based on surplus compared to 100% capacity, for study areas in SCC). It is noted that this does not include additional capacity provided by planning obligations related to new housing development.

Table 9.30: Secondary school capacity

Geography	Net Capacity (all year groups)	Pupils on Roll (January 2019)	Surplus Places	% Surplus Capacity	Net Capacity (SCC)	Forecast pupils on Roll 2023/24 (SCC)	Forecast Surplus Places 2023/24 (SCC)	Forecast % Surplus Capacity 2023/24 (SCC)
Local Wards								
Leiston	560	394	166	30%	617	545	72	12%
Saxmundham	600	474	126	27%	572	555	17	3%
Snape	--	--	--	--	--	--	--	--
Yoxford	--	--	--	--	--	--	--	--
Aldeburgh	--	--	--	--	--	--	--	--
Districts (geographic areas within 60-minute area)								
Great Yarmouth.	--	--	--	--	--	--	--	--
South Norfolk.	2,120	1,644	476	22%	--	--	--	--
East Suffolk.	10,766	9,648	1,118	11%	11,088	10,527	139	1%
Mid Suffolk.	3,961	3,426	535	16%	3,891	3,792	94	2%
Ipswich	2,470	2,317	153	6%	2,440	2,432	8	0%
Babergh	600	561	39	7%	600	672	-72	-12%
Other Scales								
60-minute area.	19,917	17,596	2,453	12%	--	--	--	--

Sources: Department for Education, 2019; SCC Directory of Schools in Suffolk for the 2020/21 school year; Norfolk County Council Secondary Schools in Norfolk 2019/20 (Ref 9.34).

9.5.85 Surplus secondary school places are unevenly distributed across the 60-minute area. There are two secondary schools within the local ward area –

Alde Valley School and SET Saxmundham Free School – both of which have a large number of surplus places (30% surplus capacity). Across the secondary schools in East Suffolk there is 11% surplus capacity (equivalent to 1,153 surplus places). There is less surplus secondary capacity in the geographic areas of Ipswich (6% surplus across Copleston High School and St Alban's Catholic High School), and Babergh (7% surplus at Holbrook Academy) that are within the 60-minute area.

Forecast pupil rolls & future development

9.5.86 SCC's Education and Learning Infrastructure Plan (Ref 9.32) considers where there would be a need for more school places in Suffolk in the future. The document sets out expected growth in secondary school numbers of 13% over the five years following the date the report was published (2017). Within this growth, 'hotspots' are identified in terms of areas expected to see the most pressure for additional secondary places – including areas within the 60-minute area – Babergh, the area south of Lowestoft, and Ipswich, particularly to the east of the town.

9.5.87 The report highlights that "*based on ONS 2016-based sub-national population projections, demand for secondary school places is expected to rise from 2016, and steadily thereafter for the next ten years*" and that "*as the ONS projections are trend-based, demand is likely to be higher, once population increases driven by new housing developments and migration are taken into account*" (Ref 9.32).

9.5.88 The report lists a number of proposed school expansions to meet demand for spaces, including the following across the 60-minute area:

- Babergh (Holbrook) – places at Holbrook Academy to be monitored, places limited and combined growth in the wider area may lead to the need to expand the school.
- Ipswich (East) – Copleston High School is expected to see a rise in pupil numbers and a project is underway to consider expansion options for the school.
- Mid Suffolk – potential increase in secondary provision in Debenham.
- East Suffolk – potential new secondary school or expansion of existing school at Martlesham (Adastral Park).

9.5.89 Norfolk County Council's Children's Services Committee published school place planning information in March 2019 (Ref 9.33) relating to the need to meet demand generated by Sustainable Urban Extensions across the

county. Within the 60-minute area, the following primary school expansions and new schools are proposed to meet projected demand for places:

- South Norfolk – potential expansion of Long Stratton High.

Pre-school provision

9.5.90 Local authorities have a statutory duty to secure sufficient childcare for children from birth to 14 (or 18 for disabled children), and produce reporting, measuring the demand for, and supply of, childcare, identifying gaps in the market and how to address any shortfall.

9.5.91 SCC's most recent Childcare Sufficiency Assessment for Suffolk was produced in 2019 (Ref 9.35). It assessed information about the current and projected supply and demand of childcare for particular age ranges of children, and the affordability, accessibility and quality of provision. This work is undertaken by gathering data on the number of places available, take up of places and population. This report sets out that:

- In total, there are 41,444 children under the age of five living in Suffolk. These children may require early years childcare.
- In total, there are 776 Office for Standards in Education, Children's Services and Skills (Ofsted) registered childcare providers in Suffolk. 598 are in receipt of early years education funding and 178 offer childcare funded directly from the parent/carer.
- Demand for funded two-year-old places is greater in areas where there are higher levels of deprivation.

9.5.92 The Childcare Sufficiency Assessment considers demand and supply on a 'cluster' basis. For the Framlingham and Leiston cluster (including Aldeburgh, Framlingham, Hacheston, Leiston, Peasenhall and Yoxford, Saxmundham and Wickham Market), there is currently a surplus of 66 available places (or 102 with migration taken into account), though overall for Suffolk there is a net deficit of over 3,000 places. A 'place' refers to a 15-hour (per week) slot.

9.5.93 Norfolk County Council's Childcare Sufficiency Assessment 2018 (Ref 9.36) sets out overall trends across the county, plus 36 detailed area profiles.

9.5.94 The following overall trends are identified:

- Although Norfolk's overall population is growing, the number of early years children is reducing.

- Across the county there is sufficient zero to five childcare to meet demand, but this varies by area.
- The quality of early years provision is high, and costs are below national averages.

9.5.95 The following Norfolk Children's Centre Areas fall within the 60-minute area:

- Village Green – there are sufficient two, three and four year old funded places across the area with 170 places available at any one time for 152 eligible children.
- Long Stratton – there are sufficient two, three and four year old funded places across the area with 253 places available at any one time for 193 eligible children.
- Diss – there are sufficient two, three and four year old funded places across the area with 362 places available at any one time for 225 eligible children.
- Acle Marshes – there are sufficient two, three and four year old funded places across the area with 473 places available at any one time for 269 eligible children.
- Harleston and Loddon – there are sufficient two, three and four year old funded places across the area with 490 places available at any one time for 295 eligible children.
- Seagulls and Gorleston and Hopton – there are sufficient two, three and four year old funded places across the area with 774 places available at any one time for 400 eligible children.

Post-16 provision

9.5.96 There are 30 maintained schools, academies and colleges across Suffolk, and 38 across Norfolk offering provision for 16-18 year olds.

9.5.97 The closest provider of 16–18 year old education to the site is Alde Valley School in Leiston.

xiv. Other community facilities

9.5.98 Within the 60-minute travel area there are 20 libraries operated by SCC and Norfolk County Councils, listed in **Table 9.31**. The closest libraries to the

site are in Leiston, Saxmundham and Aldeburgh. There are also libraries in Wickham Market and Framlingham.

9.5.99 There are a large number of village and community halls across the area. SCDC (now ESC) carried out an audit of community and village halls across the district in 2014 (SCDC Built Facilities Assessment, November 2014) (Ref 9.37). It found there are 113 village and community halls across the district, that current levels of provision are adequate to meet existing needs, and that the whole population of (what was) SCDC are within 10 minutes' drive of their nearest village or community hall (96.4% are within 10 minutes cycle, and 72.2% are within ten minutes' walk of their nearest community hall).

9.5.100 The closest halls to the site are in Leiston. These include:

- Home Guard Hall (Victory Road);
- Leiston Community Centre (King George's Avenue); and
- Women's Institute Hall (John Street).

Table 9.31: Libraries and community centres

Geography	Libraries	Community Centres
Local Wards		
Leiston	1	4
Saxmundham	1	3
Snape	--	4
Yoxford	--	5
Aldeburgh	1	3
Districts (geographic areas within 60-minute area)		
Great Yarmouth.	--	--
South Norfolk.	2	--
East Suffolk.	13	At least 113*
Mid Suffolk.	5	--
Ipswich	--	--
Babergh	--	--
Other Scales		
60-minute area.	20	At least 113*

Source: Suffolk and Norfolk County Councils, 2019.
**SCDC area only.*

xv. Sport and leisure facilities

9.5.101 **Appendix 9E** of this volume sets out a detailed baseline for sports and recreation facilities across the study area, and within local communities using published information from local authority assessments and Sport England databases.

9.5.102 It sets out the number, location and types of facilities, and estimates existing deficits, and surplus from modelling undertaken by the local authorities.

xvi. Crime and community safety

9.5.103 Suffolk experiences slightly lower rates of crime and disorder compared to the national average (71.5 recorded crimes per 1,000 people compared to 87 recorded crimes per 1,000 people in England) (Police.uk, 2019); (ONS Home Office Police Recorded Crime, 2019).

9.5.104 Crime and fear of crime are highest in the more urban areas within the county (with greater population) and often coincide with areas of relative deprivation.

9.5.105 Home Office statistics on numbers of recorded offences in the immediate counties and districts are presented in **Table 9.32** based on the number of recorded crimes during the 12-month period to December 2018.

9.5.106 There were 54,124 recorded offences in Suffolk during the 12 months to December 2018. Adjusting for the county's resident population (using ONS mid-2017 population estimates), this represents an annual crime rate of 71.5 offences per 1,000 population. This is below the regional (East of England) average of 75.9 crimes per 1,000 residents. Recorded crime rates are particularly low in (the former) SCDC (47.7 recorded crimes per 1,000 population), but are higher in WDC (82.5).

9.5.107 Data is also available on a neighbourhood-level for smaller areas for a 12-month period up to the end of July 2019. Neighbourhood policing areas are generally at a higher spatial scale than wards. This data has been analysed over 12 months to give estimates of comparative crime rates for the areas closest to the main development site.

Table 9.32: Recorded offences 12 Months to 2018

Geography	Recorded Crime	ONS Mid-year Population Estimates (2017)	Recorded Crime per 1,000 Population
Local Neighbourhoods			
Leiston[3]	1,364	26,398	51.6
Districts/Community Safety Partnerships (12 months to March 2018)			
East Suffolk	15,880	246,913	64.3
*Suffolk Coastal**	6,158	129,016	47.7
*Waveney**	9,722	117,897	82.5
Great Yarmouth	9,438	99,417	94.9
South Norfolk	5,268	135,471	38.9
Ipswich	16,089	138,480	116.2
Wider Scales (12 months to December 2018)			
Suffolk	54,124	757,000	71.5

Source: Home Office Police Recorded Crime by PFA (ONS, 2019) and Police.uk (accessed October 2019). Crime rates per 1,000 population are calculated using ONS mid-2017 population estimates. Number of recorded offences is for the 12 month period to 30 December 2018.

xvii. Deprivation and social inequality

9.5.108 The national Indices of Multiple Deprivation (ONS, 2019) highlight levels of deprivation across each local authority area, indicated relative to all other English local authorities. ESC is ranked the 143 most deprived of 317 local authorities in England. Average levels of deprivation are much higher in Great Yarmouth (20) and Ipswich (71), but lower in South Norfolk (235), Babergh (218) and Mid Suffolk (237).

9.5.109 **Figure 9.4** shows spatial areas of deprivation at Lower-level Super Output Area level – this highlights that areas in Ipswich, Lowestoft and Great Yarmouth are within the 10% and 20% most deprived areas in England.

9.5.110 A more detailed analysis of the sub-domains of the Indices of Multiple Deprivation – which explores different aspects of deprivation – identifies particular issues in relation to education, skills and training deprivation in East Suffolk, Great Yarmouth and Ipswich.

[3] Leiston Neighbourhood Policing area is approximately equivalent to the following 2011 Census ward areas: Leiston, Aldeburgh, Saxmundham, Snape, Earl Soham, Hacheston and Framlingham

Suffolk "hidden needs"

9.5.111 The Suffolk Community Foundation's report Hidden Needs in Suffolk: Five Years On (2011–2016) (Ref 9.38) reviews the degree of deprivation and disadvantage in both urban and rural areas in Suffolk, reassessing original analysis included in an earlier report published in 2011. It identifies that:

- over 83,000 people in Suffolk live in income deprivation and have limited access to necessities, suggesting that inequality is still a big problem in Suffolk, this figure having increased by 5,000 people over the last five years;
- the proportion of Suffolk's population over the age of 65 is steadily increasing at a faster rate than the national average, leading to reduced economic activity, which may have adverse effects on the county's economy;
- the impact of international immigration on population growth and age structure has been limited when compared to the effect immigration had when the first report was published;
- rural areas of Suffolk are known to experience less deprivation, but can often be underrepresented and played down by area statistics – people in rural areas are said to need 15 to 25% more income than their urban counterparts to enjoy the same standard of living, suggesting that individuals on equal incomes may experience more deprivation in rural areas compared to urban areas;
- in total 28% of all citizens living in income deprivation reside in rural areas. In addition to this, 36% of adults with disabilities or long-term illnesses and 37% of adults in Suffolk with no qualifications live in rural areas, fuelling inequality across the county;
- rural Suffolk is also subject to various geographical barriers to services such as large road distances from schools, supermarkets and GPs. Since 2008, there has also been a decline in rural access to banks, youth centres and bus services;
- rural Suffolk has also experienced deprivations in communication, with over 50% of parishes branding local broadband as *"poor",* limiting children's access to educational services and reducing the sustainability of local businesses;

- a Social Mobility Index introduced in 2016 suggests that social mobility tends to be high in the earlier years of provision, but mobility decreases as individuals approach adulthood. Ipswich and Waveney have been named in the bottom 10% of districts in England for social mobility while almost 70% of Suffolk neighbourhoods dropped position in the Indices of Multiple Deprivation rankings by at least a decile over the study period, suggesting that social mobility can be improved much further; and

- job opportunities in the entire Suffolk region are consistently better than the Eastern region (on average), leading to unemployment rates lower than national averages.

b) Future baseline

i. Population and household projections

9.5.112 The latest official 2016-based sub-national population projections for local authority areas were published by the ONS in May 2018. These provide trend-based projections for the twenty five year period from 2016 to 2041, although the focus here is on projected population change over the next ten years as this is more relevant to the Sizewell C Project timescales.

9.5.113 The latest projections for the immediate districts, the region and nationally are summarised in **Table 9.33.** Population growth over the next ten years in East Suffolk (4.3%) is expected to be slightly lower than the national average (5.9%), and significantly lower than the average growth expected across the East of England region (7.3%). In absolute terms, the population of the immediate districts is expected to grow by 44,600 people, equivalent to 4,460 people per annum. This overall increase is expected to be distributed as follows:

- East Suffolk – an overall increase of 10,410, or 1,040 per annum.

- Mid Suffolk – an overall increase of 5,920 or 590 per annum.

- South Norfolk – an overall increase of 14,260, or 1,430 per annum.

- Babergh – an overall increase of 4,190, or 420 per annum.

- Ipswich – an overall increase of 7,240, or 720 per annum.

- Great Yarmouth – an overall increase of 2,590, or 260 per annum.

Table 9.33: Sub-national population projections, 2016–26

Area	2016 Population	2026 Population	Growth
Districts			
Great Yarmouth.	98,992	101,580	2.6%
South Norfolk	132,965	147,222	10.7%
East Suffolk	245,003	255,416	4.3%
*Suffolk Coastal**	*127,836*	*133,519*	*4.4%*
*Waveney**	*117,167*	*121,897*	*4.0%*
Mid Suffolk	100,720	106,638	5.9%
Ipswich	138,515	145,753	5.2%
Babergh	90,250	94,435	4.6%
Wider Scales (12 months to December 2018)			
Norfolk	891,731	944,073	5.9%
Suffolk	751,175	788,350	4.9%
East	6,129,005	6,573,378	7.3%

Source : ONS, sub national population projections, 2018.

9.5.114 The sub-national projections indicate future changes in the age structure of the population, showing the most significant proportional growth would be in the numbers of people aged 65 and over at all spatial scales.

9.5.115 As described in **Table 9.34,** Across the immediate districts the following changes in the overall population by age group are expected:

- Children (aged 0–15 years) – numbers in this age group are expected to increase by 3,180, or 2.2% between 2016 and 2026. This is below the projected rate in the East of England (7.0%) and England as a whole (4.9%). In East Suffolk there is expected to be very little change in the number of 0–15 year olds (0.0% change).

- Working age population (16–64 year olds) – numbers are expected to increase by 3,210 or 0.7% between 2016 and 2026. This is below the projected rate in the East of England (3.3%) and England as a whole (2.3%). In East Suffolk there is expected to be a fall in the number of working age residents (-1.2%, equivalent to a fall of 1,670 working age residents).

- Above retirement age (aged 65 and over) – numbers are expected to increase by 38,220 or 20.2% in the immediate districts between 2016 and 2026. This is slightly above the projected rate in the East of

England (20.0%) and England as a whole (19.4%). In East Suffolk the increase is expected to be 18.6% (12,080 residents).

Table 9.34: Sub-national population projections by age group, 2016–26

Area	% Growth Ages 0–15	% Growth Ages 16–65	% Growth Ages 65+
Districts			
East Suffolk	0.0%	-1.2%	18.6%
*Suffolk Coastal**	*-1.3%*	*-2.4%*	*22.6%*
*Waveney**	*1.5%*	*0.1%*	*14.2%*
Great Yarmouth	0.4%	-2.0%	15.7%
South Norfolk	11.1%	6.4%	21.0%
Mid Suffolk	-2.1%	0.2%	25.9%
Ipswich	2.9%	2.0%	20.8%
Babergh	0.0%	-1.6%	22.0%
Wider Scales (12 months to December 2018)			
Norfolk	5.5%	1.6%	16.7%
Suffolk	2.0%	-0.1%	20.6%
East	7.0%	3.3%	20.0%
England	4.9%	2.3%	19.4%

Source : ONS, sub national population projections, 2018.

ii. Employment projections (sector)

9.5.116 Employment projections are developed regionally via the East of England Forecasting Model (Cambridgeshire Insights, 2018) (Ref 9.39). This model is designed to facilitate the setting of consistent housing and jobs targets and is grouped by area (district and county) and variable, as well as skills.

9.5.117 The East of England Forecasting Model baseline forecasts for sectoral growth in employment are set out below for Suffolk (county) and East Suffolk (district) in **Table 9.35** and **Table 9.36** respectively. It is noted that these forecasts do not explicitly include Sizewell C, but do account for part of Sizewell B's construction period as a result of drawing on past trends in employment in the area.

Table 9.35: East of England Forecasting Model sector employment forecasts for Suffolk county (2017)

Sector	2015	2020	2025	2030	2035	Change 2015–2035
Agriculture	7,000	8,100	7,900	7,600	7,400	300
Extraction	300	100	100	100	100	-200
Manufacturing	33,100	32,400	31,000	29,500	28,100	-5,000
Utilities/Waste	3,700	4,500	4,600	4,700	4,900	1,200
Construction	27,500	29,400	31,100	32,400	33,800	6,300
Wholesale and Retail	55,900	56,300	57,200	57,900	58,400	2,500
Transport	23,600	26,900	27,400	27,800	28,100	4,500
Accommodation, Food & Drink	25,100	25,700	26,700	27,900	29,100	4,000
Communications	6,700	6,700	6,700	6,700	6,800	100
IT	4,800	5,500	5,800	6,000	6,200	1,400
Finance and Property	14,800	13,500	14,000	14,400	14,600	-200
Professional and Scientific	21,700	22,000	23,200	24,400	25,500	3,800
Business and Employment	37,700	28,400	29,500	30,600	31,800	-5,900
Public Setor	85,600	91,300	94,600	97,700	101,000	15,400
Arts, Entertainment	10,400	11,300	11,600	11,900	12,200	1,800
Other Services	9,700	10,200	10,300	10,500	10,800	1,100

Source: Cambridgeshire Insights, 2018.

9.5.118 **Table 9.35** sets out that in Suffolk:

- The public sector is projected to grow substantially, along with construction and service activities; and
- Business and employment services are projected to decline, as is manufacturing.

Table 9.36: East of England Forecasting Model sector employment forecasts for East Suffolk district (2017)

Sector	2015	2020	2025	2030	2035	Change 2015–2035
Agriculture	2,200	2,600	2,500	2,400	2,400	100
Extraction	100	–	–	–	–	-100
Manufacturing	10,200	10,000	9,500	9,000	8,500	-1,600
Utilities/Waste	1,100	1,300	1,300	1,400	1,400	300
Construction	7,600	8,300	8,700	9,000	9,300	1,700
Wholesale and Retail	15,500	15,600	15,800	16,000	16,200	600
Transport	10,800	12,600	12,700	12,800	12,900	2,100
Accommodation, Food & Drink	9,300	9,500	9,900	10,300	10,800	1,400
Communications	4,700	4,700	4,700	4,800	4,900	200
IT	900	1,100	1,100	1,200	1,200	300
Finance and Property	2,100	2,000	2,000	2,100	2,100	100
Professional and Scientific	5,800	6,000	6,200	6,500	6,700	900
Business and Employment	7,000	6,500	6,600	6,700	6,800	-200
Public Sector	23,000	24,400	25,300	26,200	27,100	4,100
Arts, Entertainment	3,200	3,500	3,600	3,700	3,700	500
Other Services	2,900	3,000	3,000	3,100	3,100	300

Source: Cambridgeshire Insights, 2018.

9.5.119 **Table 9.36** sets out that in East Suffolk:

- the public sector is projected to grow substantially, along with construction and service activities and transport employment; and
- business and employment services are projected to decline slightly, as is manufacturing.

iii. Skills and training forecasts

9.5.120 The Construction Industry Training Board (CITB) and Experian generate research into the future for construction skills, employment and their drivers on a four-year basis (CITB, 2018) (Ref 9.40). The latest report considers the period from 2019 to 2023 and sets out that:

- With an annual average growth rate of 1.2% for construction output between 2019–23, the East of England is similar to the forecasted UK average growth rate of 1.3%.

- Construction employment in the region is also forecast to grow at an average rate of 0.4% per year, rising from nearly 245,000 workers at the end of 2018 to nearly 250,000 by 2023.

- The average annual recruitment rate in the East of England is forecast to be 2.0% of the base 2018 workforce, stronger than the UK figure of 1.2%. This means the region would be looking for an extra 4,910 workers each year.

- In terms of roles, at a national level the greatest demand is for construction process management, other construction professional and technical staff scaffolders, wood trades, logistics personnel and plant operatives. In the East of England, growth is expected to be strongest for managerial, professional and technical occupations.

- At present, the forecasts for the East of England do not include Sizewell C. However, it is notable that stalled new nuclear power generation projects in the north-west (Moorside) and Wales (Wylfa Newydd) have had significant effects on revising down growth in those regions from previous projections.

9.6 Environmental design and mitigation

a) Introduction

9.6.1 As detailed in **Volume 1**, **Chapter 6** of the **ES** (Doc Ref. 6.2), a number of primary and tertiary mitigation measures have been identified through the iterative EIA process and have been incorporated into the design and construction planning of the proposed development.

9.6.2 In parallel with the assessment process, SZC Co. has been working with the local authorities and other stakeholders to identify and plan for measures to avoid, and/or mitigate, any negative impacts from the development and to enhance positive effects during the construction phase and once Sizewell C is operational.

b) Primary mitigation

9.6.3 This is often referred to as 'embedded mitigation' and includes modifications to the location or design of the development made during the pre-application phase that are an inherent part of the Sizewell C Project,

become a fundamental part of the design for which consent is sought, and do not require additional action to be taken.

9.6.4 A number of primary mitigation measures have been embedded into the design, and for the assessment, this chapter assumes that they are in place to mitigate otherwise potentially significant effects. The assessment notes that these mitigation measures would require construction and implementation themselves, and accounts for that transition period. These are identified in **Chapters 2** and **3** of this volume, and are summarised in this section. The summary makes clear where and why these measures have been included and the way in which they have contributed to the management and reduction of environmental effects.

9.6.5 The following primary mitigation relevant to socio-economic effects has been consulted upon and embedded into the Sizewell C Project:

i. Temporary Accommodation Campus

9.6.6 A temporary accommodation campus for construction workers, including facilities such as a gym, restaurant, bar and informal recreation facilities, to be located on the main development site.

9.6.7 These design measures, including provision for emergency services presence, welfare, food/drink and recreation activities for workers at the accommodation campus, would contribute to reducing potential effects on public safety and emergency services.

ii. Temporary Caravan Park

9.6.8 A temporary caravan site for construction workers would be located on the Land to the East of Eastlands Industrial Estate, also part of the main development site.

9.6.9 Design measures associated with the caravan site would contribute to reducing potential effects on public safety and emergency services.

iii. Temporary Occupational Healthcare Service

9.6.10 A temporary on-site, 24/7 occupational health service for construction workers is described in detail in **Volume 2**, **Chapter 28** of the **ES** (Doc Ref. 6.2).

9.6.11 The provision of an on-site occupational healthcare service for workers at the main development site would include mental and sexual health services. The provision of this occupational healthcare service would be secured through an obligation in the Section 106 Agreement (see **draft**

Section 106 Head of Terms provided as **Appendix J** to the **Planning Statement** (Doc Ref. 8.4)).

iv. Permanent Off-site Sports Facilities

9.6.12 SZC Co. has committed to significant investment in local recreation, sport and leisure provision in Leiston in the form of a 3G pitch and two multi-use games areas (MUGAs) at Alde Valley School in Leiston, in recognition that:

- the workforce would likely raise demand for specific types of activity – such as football – of which there is a local deficiency in provision (of all-weather pitches); and
- investment in facilities would be likely to make a positive contribution to integration and the experience of the workforce and local community.

9.6.13 This facility would have shared use with the school and local community and would therefore have residual impacts on recreation, sport, and leisure services which would be major beneficial at all levels.

9.6.14 Measures would be built in to the design to reduce safeguarding risks, such as physical and temporal segregation of use by workers and the community, and the school, at shared recreational facilities in Leiston.

9.6.15 SZC Co. proposes to construct or provide a contribution to fund the construction of this facility which would be managed by ESC. The funding would include a contribution for the maintenance of the pitches during the construction phase when the facilities would be used by the Sizewell C construction workforce as well as provision of a sink fund. During the operational phase, it is proposed that any ongoing costs of the sports facilities would be borne by ESC or Alde Valley School. The provision of the off-site sports pitches will be secured through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

v. Visitor centre

9.6.16 The existing Sizewell B visitor centre would be replaced with a permanent, modern educational facility for visitors, including school groups. It is proposed that the new visitor centre would be located at the north-east of the Coronation Wood development area, adjacent to the proposed Sizewell B training centre. It is anticipated that the proposed visitor centre would include exhibition spaces, an auditorium, media centre, viewing area, classrooms, and offices.

9.6.17 The visitor centre would be accessible by the general public with exhibition space and modern educational elements providing capacity for school groups. Its role would be to provide information to the general public and school groups about aspects including: the process for generating electricity, the benefits of low-carbon energy and sustainability more generally, and the new technology's role in the future of nuclear power in the UK. It would also illustrate the contribution of Sizewell C to carbon reduction and its role as part of the Suffolk Energy Coast and demonstrate the importance of the surrounding AONB.

c) Tertiary mitigation and enhancement

9.6.18 Some mitigation measures comprise standard management practice, and are therefore included as tertiary mitigation against which impacts are assessed. These measures are embedded processes/procedures, rather than physical design measures. For the purposes of the socio-economic assessment, processes and procedures specified for the Sizewell C Project are also proposed to provide enhancement for beneficial effects.

9.6.19 If, after accounting for these activities, significant adverse effects are still assessed as likely within **section 9.7** below, further mitigation measures are identified in **section 9.8** of this chapter.

9.6.20 These include employment and training activities to secure local recruitment set out in the **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9), a Worker Code of Conduct to help govern worker behaviour, and a **Supply Chain Strategy** provided in **Appendix B** of the **Economic Statement** (Doc Ref. 8.9).

9.6.21 The implementation of the **Employment, Skills and Education Strategy** and **Supply Chain Strategy,** including the proposed tertiary mitigation, will be secured through obligations contained in a Section 106 Agreement (see the **draft Section 106 Heads of Terms** appended to the **Planning Statement** (Doc. Ref. 8.4)).

i. Employment, Skills and Education Strategy

9.6.22 SZC Co. has worked closely with stakeholders in the region to develop a strategy with a range of measures that combine to create an environment in which education, skills and workforce development can flourish, to the benefit of both the Sizewell C Project and the region.

9.6.23 The **Employment, Skills and Education Strategy** is included as **Appendix A** to the **Economic Statement** (Doc Ref 8.9). It sets out a strategic approach centred around four strategic priorities:

- Creating economic benefit and improving social mobility by:
  - leaving a legacy;
  - addressing key government and regional policy priorities; and
  - linking employment, skills and education to complementary activities for developing the supply chain as set out in **Appendix B** to the **Economic Statement** – **Supply Chain Strategy** (Doc Ref 8.9).
- Minimising workforce and project risk caused by a lack of availability, capability, capacity or competence in the UK or regional skills base.
- Setting realistic DCO commitments and leveraging significant additional value.
- Where appropriate, integrating strategic activity between Sizewell C and Hinkley Point C – and in the future Bradwell B – by leveraging the full benefit of 'fleet effect' for skills and workforce.

9.6.24 The **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** sets out how learning from Hinkley Point C has helped provide more clarity about Sizewell C, and sets out a 'prospectus' of required roles and qualifications for Sizewell C in the future by phase of construction and type of role.

9.6.25 It then sets out a range of interventions and investments that the Sizewell C Project will make, to be secured through the Section 106 Agreement, including:

- A Sizewell C Jobs Service - SZC Co.'s focus on recruitment will be on targeting the right people into the right jobs through the enhancement of the Hinkley Point C Jobs Service. This will provide a service that is managed centrally but delivers locally though a small number of dedicated staff in Suffolk and through optimising external partnerships.
- Skills initiatives – including (where funding is referred to, this will be secured through the Section 106 Agreement):
  - a flexible Asset Skills Enhancement and Capability Fund with a strong, accountable governance structure including Tier 1 contractors and local stakeholders;

- a commitment to funding a Regional Skills Coordinator post to provide a focal point of coordination and skills planning between the Sizewell C Project and providers; and
- supporting contractors in exploring options for training and assessment facilities to enable the competence of workers to be assessed and to identify areas of additional training.

- Education initiatives – partnering with regional stakeholders to invest in a range of activities including:
  - supporting specific and existing educational initiatives in the region that are working well or are supporting young people in raising their aspirations for careers in energy, engineering or construction;
  - supporting and investing in specific interventions with a focus on career introduction and development;
  - starting early with 'aspiration raising' activities;
  - introducing actual opportunities to 'have a go' with an emphasis on the promotion of Sizewell C's critical skills that are in short supply;
  - creating an innovative and 'first of a kind' bursary scheme to support the creation of alternative pathways for those that haven't reached the required entry level, providing a 'second chance' for young people in Leiston, Lowestoft, Great Yarmouth and Ipswich; and
  - establishing a Young Sizewell C programme providing an insight programme to inspire and build awareness of opportunities among young people who are closest to the workplace and to help pipeline them into actual Sizewell C opportunities.

9.6.26 The **Employment, Skills and Education Strategy** will be linked with priority social services target groups, for example so that outreach programmes target children, NEETs, and other vulnerable groups

ii. Supply Chain Strategy

9.6.27 SZC Co. has set out to develop a strategy for its supply chain for Sizewell C that builds on the good progress made at Hinkley Point C and seeks to engage and promote business in the region to gain competency to compete for and win contracts.

9.6.28 The **Supply Chain Strategy** is included as **Appendix B** to the **Economic Statement** (Doc Ref 8.9). The core objective of the strategy is to

successfully deliver the construction and commissioning of the Sizewell C Project utilising the expertise and capability within the local and regional supply chain, where possible.

9.6.29 The strategy sets out how SZC Co. will aim to replicate the design of Hinkley Point C to benefit from being able to use the UK approved, frozen EPR™ design being built in Somerset, while taking into account local conditions in order to develop and implement Sizewell C. Replication does not mean that the entire Hinkley Point C supply chain and workforce will be transferred to Sizewell C, rather that core elements of the supply chain that are critical to replication of the power station are transferred.

9.6.30 SZC Co. therefore anticipates that Sizewell C will be able to deliver a similar level of economic benefits to Suffolk and the East of England, in terms of supply chain opportunities for local and regional businesses, as Hinkley Point C is delivering for Somerset and the South West.

9.6.31 An important role of the strategy is to contribute to the economy of the East of England and the UK more widely: Sizewell C will support the maintenance and development of the UK nuclear sector and wider construction innovations and skills.

9.6.32 The strategy identifies lessons learnt from previous experience, and sets out a range of initiatives, to be secured by the Section 106 Agreement, that will enable the region to capture economic benefits generated by the goods and services needed for the delivery of the Sizewell C Project. These include:

- A Sizewell C supply chain team, partnering with the Suffolk Chamber of Commerce. The team will assist local and regional businesses in winning contracts on the Sizewell C Project through management of a supply chain website with project information, details of work packages and professional standards, signposting to relevant support, details of events and examples of success.

- A Sizewell C Supply Chain Portal capturing details and core capabilities of regional businesses and mapping them against requirements of the Sizewell C Project, brokering business support and matching suppliers with SZC Co. and Tier 1 contractors.

- Contractor engagement including senior leadership commitments from Tier 1 contractors to engage with the local and regional supply chain, including attendance at ‘meet the buyer’ events.

- Monitoring and reporting in order to compare and contrast local and regional levels of engagement.

9.6.33 Sizewell C's strategy is to integrate employment, skills, and education with the supply chain development activity in order to help jobseekers find roles on the Sizewell C Project and to help backfill vacancies that may become harder-to-fill within the supply chain, using the Sizewell C Jobs Service.

9.6.34 The **Supply Chain Strategy** will be linked with priority social services target groups, for example so that outreach programmes target children, NEETs, and other vulnerable groups

iii. Code of Construction Practice and Worker Code of Conduct

9.6.35 Some tertiary measures have been developed for multiple purposes – for example to deliver safe, efficient construction activities, but also to promote community cohesion and minimise effects of the workforce on perceptions of public safety.

Code of Construction Practice (CoCP) (communication, community and stakeholder engagement)

9.6.36 The strategy for communication, community, and stakeholder engagement is set out in the **CoCP** (Doc Ref. 8.11). This would provide a point of contact between the community and the Sizewell C Project, both to disseminate information and to receive comments/complaints. Community liaison activities set out in the **CoCP** (Doc Ref. 8.11) would address issues relating to community cohesion and integration that may arise from members of the public.

Recruitment activities and Worker Code of Conduct

9.6.37 Security vetting would be embedded into any recruitment and contracting by SZC Co. and Tier 1 contractors.

9.6.38 A Worker Code of Conduct (see Hinkley Point C example appended to the **Community Safety Management Plan** (Doc Ref. 8.16)), would be put in place to set required standards on behaviour both on and off site.

9.6.39 The Worker Code of Conduct would be explained to workers at induction and reinforced in the course of the Sizewell C Project through ongoing training and awareness campaigns. Each worker would be required to sign a copy of the document at induction. Complaints would be monitored, as discussed in the **CoCP** (Doc Ref. 8.11), and action taken where necessary.

9.6.40 Whilst the absence of a contractual relationship means SZC Co. are not able to discipline workers directly, regular performance reviews with

contractors would provide a means of ensuring good worker behaviour and breach of the Worker Code of Conduct may mean dismissal of the worker from the Sizewell C Project.

iv. Transport measures

9.6.41 Mitigation related to road safety as set out in **Chapter 10 (Transport)** of this volume has also been considered as such mitigation would reduce effects on the emergency services.

9.6.42 Tertiary mitigation strategies such as the **Traffic Incident Management Plan** (Doc Ref. 8.6), **Construction Traffic Management Plan** (Doc Ref. 8.7), and the **Construction Worker Travel Plan** (Doc Ref. 8.8) will be secured through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**). These implementation strategies would contribute to a reduction in significance of potential effects on emergency services, which rely on local roads to respond to incidents.

9.7 Assessment

a) Introduction

9.7.1 This section presents the findings of the socio-economic assessment for the construction, operation and removal and reinstatement (where relevant) phases of the proposed development.

b) Construction

i. Overview of construction phase effects

9.7.2 The socio-economic construction phase effects of the Sizewell C Project result from the workforce required to build Sizewell C, and the demand for goods and services to support the development.

9.7.3 **Section 9.4** of this chapter, along with the appended technical notes, summarises the Sizewell C Project assumptions in relation to:

- how many workers will be required and when (workforce profile);
- where workers are likely to be recruited from (HB and NHB recruitment);
- where NHB workers are likely to live, based on accommodation capacity assumptions and SZC Co.'s **Accommodation Strategy** (Doc Ref. 8.10), and the Gravity Model produced for the **Transport Assessment** (Doc Ref. 8.5); and

- the demographic characteristics of the workforce.

9.7.4 This section uses these assumptions to assess the effects of the proposals against the policy, baseline and significance criteria described above in relation to the following topics:

- Economic effects including labour market effects, business and supply chain effects, wages/spending and additionality, and effects on the tourism and agricultural economies.
- Accommodation effects.
- Population and demographics.
- Public services/community facilities including education and pre-school; social services; other county level services; formal sport and leisure; and regulatory and environmental services.
- Community safety and emergency services.
- Community cohesion and integration.

ii. Economic effects

9.7.5 The construction of Sizewell C could have a range of economic effects. In this section the areas of impact would focus on spatial levels identified in the baseline assessment.

Labour market effects

9.7.6 Assumptions about the labour force requirements for the construction of Sizewell C are set out in **Appendix 9A** of this volume.

9.7.7 The construction workforce profile provides an estimate of the number of roles required in any given month, by type of role, over the construction period. It shows the overall build-up and ramp-down of the construction workforce, and its components – civils construction, mechanical, electrical and heating, professional and management, site support/services, construction of associated development sites (mainly civils) and the operational workforce.

9.7.8 The workforce profile highlights that:

- in the early years, the workforce profile is mainly driven by the requirement for civils roles, supported by non-construction project management and professional roles and site support roles;

- during this time there is a component of the workforce constructing the associated development sites (including the new road schemes, park and ride facilities and the on-site accommodation campus);
- the civils workforce peaks at just above 3,600 workers in year five of the construction phase;
- the civils workforce then reduces, as 'J0'[4] is passed and at this stage there is an increase in mechanical, electrical and heating roles. During this stage, the operational workforce is also starting to build up;
- the peak of the construction workforce happens in year seven of the construction phase – at this stage the mechanical, electrical and heating workforce has peaked at around 3,300 roles;
- the peak of the workforce is relatively short – it is likely to exceed 7,000 workers for less than two years; and
- following the mechanical, electrical and heating peak, the workforce drops substantially and from year ten to completion is well below 2,000 workers – around this stage associated development sites are deconstructed and site restoration is undertaken, and the operational workforce reaches full capacity (at 900) – so the construction-related workforce accounts for around 1,000 workers at this stage.

9.7.9 This 'gross' peak employment total of 7,900 (plus 600 associated development staff) equates to around 1% of jobs in the 90-minute commuting area (CDCZ) for HB workers.

9.7.10 The build-up of the workforce equates to approximately 1,100 jobs per year for the first 7 years of the Sizewell C Project (up to peak construction). This equates to 0.2% of total jobs in the CDCZ. The addition of 1,100 jobs to the regional economy (on average) over this period compares to an average annual jobs growth of 4,900 in Suffolk and 67,500 in the East of England between 2012 and 2017.

Non-home-based recruitment

9.7.11 Because of the relatively high levels of labour demand, it is projected that a substantial proportion of the workforce would be recruited from outside the

[4] The date SZC Co. uses to denote the first pour of nuclear safety related concrete – a standard milestone in French nuclear construction.

90-minute area. This would vary by skill type and timing within the Sizewell C Project as described in **Appendix 9A** of this volume.

9.7.12 The NHB split is based on the Gravity Model assumptions, including assumptions about project accommodation set out in **Appendix 9D** of this volume.

Home-based recruitment

9.7.13 The Sizewell C Project is likely to generate the types of non-operational jobs for existing local residents at the overall peak of the construction period as shown in **Table 9.37.**

Table 9.37: Estimated construction and support jobs supported at peak likely to be taken by home-based workers

Occupation Type	Home-Based Workers at Peak	
	Workers	Sectors
Civil operatives.	460	Timber and formwork, concrete/cement/ /steelfixers, drivers, lifting operatives and supervisors, labourers, steelwork erectors, access and other plant operators, welders, civil works labourers and semi-skilled occupations.
Mechanical, electrical and heating operatives.	650	Semi-skilled mechanical, electrical and heating operatives, welders, pipefitters, cabling operatives, fitters, electricians, laggers, support services, instrumentation.
Professional and management.	150	Mainly professional, management-type jobs.
Site services/support.	550	Administrative, private security and service sector (e.g. catering, cleaning).
Associated developments.	600	Includes drivers, security, service-sector jobs, cleaning, maintenance and administrative jobs.
Total	**2,410**	**All construction-related workforce associated with the Sizewell C Project at peak.**

9.7.14 At peak, this means an additional 2,410 jobs for local residents across a range of occupations and skill levels in non-operational roles. In total, this equates to around 7% of total construction jobs in the 90-minute area, and is therefore assessed as a moderate beneficial effect which would be **significant** at this level.

9.7.15 Construction already accounts for over one billion pounds of output in Suffolk, contributing around 7% of the county's total output. In the construction sector in Suffolk, gross value added per worker per year stands at over £60,000 per full-time equivalent. Activity at Sizewell C

therefore equates to close to two and a half billion pounds over the course of the construction phase (based on around 40,000 person-years of employment required).

Impacts on the dynamic labour market

9.7.16 The labour market is dynamic: people move in and out of the labour market and move between jobs regularly. As demand for workers increases, jobs may be filled by people currently in employment moving jobs, people who are registered as unemployed, and people who do not form part of the labour market because they are classed as economically inactive.

9.7.17 There are generally two components of worklessness – economically active people who are unemployed (but are actively seeking work via claiming Job Seekers Allowance), and people who are economically inactive, but are ready to and want to work. The number of people who are economically inactive but who want to work is significantly greater than the numbers who are registered as unemployment benefit claimants. The Government's preferred definition of unemployment – the International Labour Organisation (ILO) measure – shows higher numbers of people unemployed than either the Job Seekers Allowance measure or the economically inactive who want to work.

9.7.18 The ILO definition of unemployment includes both those who are economically active, but unemployed and seeking work (for example, claiming Job Seekers Allowance), and people who are economically inactive but want to work and are work-ready (but are not actively seeking work). Taken together, these groups offer a considerable source of spare capacity for the labour market.

9.7.19 **Figure 9.5** identifies the extent of this labour pool in Suffolk, showing that currently there are 31,400 people in Suffolk who are unemployed but looking for work, or are economically inactive but want a job, and on average through the economic cycle there are between 35,000 and 40,000 (ONS Annual Population Survey, 2018).

9.7.20 These numbers are volatile, and there are significant annual changes in the level of economic inactivity, which is much more sensitive to changes in economic output than unemployment. It can therefore be seen that the number of people who are active in the labour market is not fixed – it expands and contracts according to economic environment, so when there are more jobs available, it can be expected that more people would be economically active.

9.7.21 Depending on the point in the economic cycle, between 40% and 52% of new jobs are filled by people who were not previously working (Ref 9.41). Some of these would be registered as unemployed, and some would not.

Some would need help to get into work, others would not. The corollary of this is that up to 60% of vacancies would be filled by people who change job.

9.7.22 This is the normal operation of the labour market, and the choices of individuals within it, and is not directly related to the impacts of the proposed development.

9.7.23 This is partly because the supply of labour is not fixed. When new jobs are created, it encourages more people to start work and enables those who are in work to increase their hours. It also allows people who currently have to travel out of the area to change jobs to something closer and more convenient.

9.7.24 Employment and economic activity should also be seen in the context of moves between jobs, sectors and locations. Whilst there is no single data source for average job tenure, a number of UK-based studies conducted based on the Labour Force Survey and the Organisation for Economic Co-operation and Development (OECD) produces an annual dataset (OECD, 2015). **Table 9.38** summarises these broad statistics on jobs tenure across all industries:

Table 9.38: Average job tenure in the UK

Job Tenure	<1 Year	1–3 Years	3–5 Years	5–10 Years	>10 Years
Percentage	17.6%	16.5%	13.3%	20.7%	31.9%

Source: OECD, 2015.

9.7.25 This means that of the 343,500 people working in Suffolk (APS, 2018), on average, more than 60,000 change job in any given year. The data also shows that around half of workers have a job tenure of less than five years. By extension, within the construction phase of Sizewell C, most workers would change jobs twice and most employers would need to fill each of their posts twice.

9.7.26 Average tenure is particularly short in construction given the transient and mobile nature of projects and the workers they employ. A survey by BMG Research for CITB in 2018/19 (Ref 9.42) identified that in the East of England:

- 27% of workers expect to be working on a site for less than three months;
- 18% of workers expect to be working on-site for between three and six months; and

- only 23% expect to be working on a site for more than one year.

9.7.27 Most construction projects in the UK and the East of England are relatively short-term in nature, with a constant churn of jobs and skilled workers operating in many different locations. Sizewell C would be fairly unusual, as it is a longer-term project with a very wide range of skills required over different stages of the build.

9.7.28 Whilst a temporary impact, Sizewell C's construction phase would be relatively long-term for a construction project, and notably longer than the average job tenure in the UK. A worker who might leave a permanent job to move to a temporary construction job on the Sizewell C Project would do so voluntarily – as is the normal operation of the labour market – and the training and work experience received would give them the opportunity to move onto other jobs, careers and projects.

9.7.29 SZC Co.'s contractors stand to benefit from recycling workers over that period due to lower costs in re-training, so it is likely that workers on the Sizewell C Project would be in a strong position to move to other work roles, gaining sustainable careers with transferable skills over a long time period. As such, SZC Co. has developed an **Employment, Skills and Education Strategy,** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9) to maximise local recruitment, and ensure the skills benefits can be retained locally. **Table 9.39** shows the proportion of total jobs and jobs in the construction sector in Suffolk that the total workforce at Sizewell C represents in each year of the Sizewell C Project.

Table 9.39: Sizewell C jobs as a % of all jobs and construction sector jobs

Year	SZC Jobs (Annual average)	SZC Construction Jobs[5]	Suffolk County			
			All Jobs (Forecast from 2022)	%	Construction Jobs (Forecast from 2022)	%
1	742	497	376,105	0.2%	30,215	2%
2	1,567	1,050	377,840	0.4%	30,487	3%
3	3,072	2,058	379,712	0.8%	30,782	7%
4	4,158	2,742	381,679	1.1%	31,109	9%
5	6,888	4,475	383,394	1.8%	31,375	14%
6	6,931	4,578	385,038	1.8%	31,596	14%

[5] "Construction" i.e. mechanical, electrical and heating and civils and associated development construction, not including non-construction roles at associated development sites such as catering or security.

Year	SZC Jobs (Annual average)	SZC Construction Jobs[5]	Suffolk County			
			All Jobs (Forecast from 2022)	%	Construction Jobs (Forecast from 2022)	%
7	7,796	5,067	386,763	2.0%	31,864	16%
8	6,742	4,100	388,438	1.7%	32,111	13%
9	4,506	2,582	390,243	1.2%	32,412	8%
10	2,116	895	391,728	0.5%	32,664	3%
11	1,727	558	393,534	0.4%	32,947	2%
12	1,284	257	395,268	0.3%	33,245	1%

Labour market churn and 'hard to fill' vacancies

9.7.30 There is the potential as part of this process that employees would be recruited from other local employers, thus causing vacancies that are harder to fill in the case of some occupations.

9.7.31 Experience at Sizewell B was that around 20% of locally recruited employees had previously been unemployed or economically inactive and around 30% (600 of 2,200) recruited in the peak recruitment year had come from other local employers. A survey of 160 local companies found that less than 10% of the companies thought the power station project made it more difficult to retain or recruit (replacement) staff (Ref 9.43).

9.7.32 Research by the Resolution Foundation (Ref 9.41) suggests that up to 60% of people starting new jobs have come from other jobs, with the remainder being entrants into the labour market. This is strongly linked to the economic cycle, and in the last recession in 2010 only 48% of jobs were filled by people already in work. This suggests that Sizewell C is likely to see a larger proportion of its local workforce drawn from people entering or re-entering the labour market.

9.7.33 If similar proportions to Sizewell B were to occur at the peak of the Sizewell C construction programme, then of the (up to) 2,410 new home-based roles (including at associated development sites but discounting operational staff) this would mean around 1,205 would move with the existing employer and 1,205 would be newly recruited (from either worklessness or another job).

9.7.34 Of those newly recruited up to c. 480 would be formerly unemployed or previously inactive workers and up to 725 would be workers from existing firms. This would equate to:

- around 2% of unemployed workers in the CDCZ area, or around 5% in Suffolk gaining work on the Sizewell C Project. This is assessed as a

moderate to major beneficial impact which would be **significant** at all spatial levels; and

- around 2% of the construction workforce in the CDCZ area, or 4% in Suffolk gaining work on the Sizewell C Project, which would be negligible and **not significant** in the context of the overall 'churn' within the construction and overall labour market in the area.

9.7.35 Labour market churn (as opposed to displacement[6]) (Ref 9.44) is a normal feature of the economy, particularly in the construction sector. Employers fill any emerging vacancies, across a range of skills. Even those jobs that are highly skilled can be filled by training people from the next level down, so these would generally be filled from elsewhere in the labour market. It is likely that the creation of employment at Sizewell C would increase labour market churn, but given the scale of the labour market and its flexibility, this change is considered to be **not significant.**

9.7.36 The Sizewell C Project would recruit HB workers from four different categories:

(a) locals without a job or with spare capacity for work;

(b) locals who change job;

(c) locals whose employer gets a contract on the Sizewell C Project; and

(d) locals who work elsewhere or are self-employed and/or work on very short-term contracts/tenures.

9.7.37 SZC Co. considers that the Sizewell C Project should aim to achieve a high level of local benefits by recruiting from categories (a), (b), (c), and (d) and that (b) is the area of concern for existing local businesses, local authorities, and NALEP as identified in the **Consultation Report** (Doc Ref. 5.1).

9.7.38 Category (a) has significant potential for recruitment based on existing and continual spare capacity in the labour market as set out above; and would be enhanced through SZC Co.'s package of measures to improve skills and education set out in its **Employment, Skills and Education Strategy,** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9).

9.7.39 Hinkley Point C's initiatives to support employment, recruitment, skills and training have proven to be successful – including (Ref 9.45):

[6] Displacement is defined in the HM Treasury Green Book as: "*the degree to which an increase in economic activity promoted by an intervention is offset by reductions in economic activity elsewhere*" (Ref 9.44).

- a cumulative total of 433 apprenticeships have been delivered (as at April 2019) compared to a project aspiration to create 400 new apprenticeships and facilitate 1,000 during the construction phase;

- 15,150 people have registered with the HPC Jobs Service (of which 48% are local residents) (as at January 2019) and 759 people have been placed in work through the HPC Job Service (as at April 2019) of which around 50% are local residents;

- 740 young people (as at April 2019) have registered with the Young HPC Programme; and

- by March 2018, 8,767 people in West Somerset had benefitted from the project's interventions for developing career choices and employment outreach such as aspiration building and skills development.

9.7.40 Category (c) has the opportunity to deliver benefits to existing businesses and their employees as a result of growing competencies and skills.

9.7.41 Evidence points strongly to a dynamic labour market that is flexible and responsive, rather than an over-heated labour market where extra demand would cause likely significant impacts.

9.7.42 As a result, significant adverse impacts are not anticipated, but SZC Co. is working to ensure this is the case through a range of employment, skills and supply chain support measures.

Business and supply chain

9.7.43 The development of Sizewell C would create supply chain opportunities, and represents a substantial part of the UK's national nuclear new build programme and wider infrastructure development.

9.7.44 The supply chain would operate on a number of levels:

- There would be several Tier 1 contractors appointed for the construction of the Sizewell C Project, national and international companies working independently, or through alliances who would be responsible for delivering one or more packages of works. A substantial proportion of construction expenditure would be on equipment and materials through this group.

- There would be a large number of Tier 2 sub-contractors and suppliers working for these contractors, ranging from providing

materials, equipment, very specialist skills, through to more general trades.

9.7.45 The technology suppliers/engineers and equipment and materials contracts (national and international level) would contribute to national policy ambitions set out in the UK's Industrial Strategy (Ref 9.46) to develop the UK's low carbon manufacturing capacity.

9.7.46 There are however, a number of local and regional firms that may benefit from these contracting opportunities. SZC Co. and its supply chain would also procure a large range of other (non-construction) services including, for example, professional and design services, facilities management (for campuses and park and rides), transport services, security and catering.

9.7.47 Construction contracts and sub-contracts, and particularly non-construction packages would have a much stronger local and regional element, with a substantial proportion of construction value retained in the local economy through wages to HB workers and expenditure by NHB workers.

9.7.48 At Hinkley Point C[7], EDF Energy and the Department for Business, Energy & Industrial Strategy set out that:

- Over £650 million had (at July 2018) been spent in the south-west (including South Wales).
- In addition to the £650 million of expenditure to date, contracts have been entered into for a further £700 million, including larger Tier 2 contracts.
- This brings a total of commitments, including spend to date, to over £1.3 billion. A project to capture spend below Tier 1 has since been rolled out.

9.7.49 Committed local and regional spend has increased since the publication of the BEIS report referenced above, and stood at £1.55 billion at the end of 2018. This committed regional spend equates to around 7% of total spend on the Hinkley Point C project, and is likely to grow further.

9.7.50 By comparison, information on local contract expenditure for the main civils contractor at the most recent comparative example of a new nuclear build elsewhere - Flamanville 3 in France - showed about 2% local expenditure out of €400 million total (2007–mid-2009), within 50km of that site, mainly in Cherbourg.

[7] BEIS (July 2018) Hinkley Point C Wider Benefits Realisation Plan.

9.7.51 At Sizewell B, the figure of contracts with local firms in the larger area of Suffolk and Norfolk was a little higher at about 4% (i.e. c. £80 million out of total contract value of about £2 billion) over the construction phase (1987-1995, not adjusted for inflation).

9.7.52 The total value of the Sizewell C project is estimated at £20 billion, made up from the sourcing of goods and materials, and cost of labour. It is anticipated that – if similar activities and local supply chain recruitment are achieved at Sizewell C as Hinkley Point C – there could be a 'local' retention of in excess of £1.5bn over the construction period, equivalent to an average of £125m per year.

9.7.53 This is considered a moderate beneficial effect at the regional level. This would be **significant**.

Wages/Spending and additionality

9.7.54 Assuming NHB workers spend all of their nightly subsistence allowance of £40, that would increase spending in the area by an average of £21.5 million per year, or nearly £260 million over the construction period.

9.7.55 The extra wages and spending from HB workers will depend on their previous circumstance, but if up to 50% were previously unemployed, this would represent an average boost to incomes each year of £15 million compared to receiving £10,000 per year in benefits. The boost to local spending would be less than that (after taxes and savings) but could still be £5 million per year or £60 million over the construction period.

9.7.56 Together these add up to just over £320 million of extra local spending during the construction phase.

9.7.57 The estimated net additional outcome at Sizewell B for additional workforce expenditure in the locality was around £80m. Uprating this, taking into account the construction costs for Sizewell C, would give a total of £190m or an average of £16m per year.

9.7.58 Local wages for HB workers and local spending on food and accommodation by NHB workers would equate to just under £1.1bn at an average of £91m per year over 12 years.

9.7.59 All of the impacts set out above would be additional to the local and regional economy, in that without the development of Sizewell C they would not occur - in economic terms there is no 'deadweight' (also known as non-additionality), i.e. there is no investment in a new nuclear plant in the area that would have happened anyway. Similarly, there is no 'displacement' or activity that moves to the site that would otherwise take place elsewhere.

9.7.60 As a result, the wages/spending and additionality effects of the Sizewell C Project are considered to be moderate beneficial and **significant** at the local and regional scale.

9.7.61 It is recognised that these benefits relate to the economy and workers within the economy, noting that there is potential for businesses to find that some vacancies become harder to fill. This effect is addressed earlier in this section.

9.7.62 Further information on the economic benefits of the Sizewell C Project is set out in the **Economic Statement** (Doc Ref. 8.9).

Effects on the tourism economy

9.7.63 The NPS EN-1 (Ref 9.1) states that the construction, operation and decommissioning of energy infrastructure may have socio-economic impacts and that:

> *"Where the project is likely to have socio-economic impacts at local or regional levels, the applicant should undertake and include in their application an assessment of these impacts as part of the Environmental Statement… which may include effects on tourism"* (paragraph 5.12.2-3) (Ref 9.1).

9.7.64 It also sets out that that:

> *"The Infrastructure Planning Commission may conclude that limited weight is to be given to assertions of socio-economic impacts that are not supported by evidence (particularly in view of the need for energy infrastructure as set out in this NPS)"* (paragraph 5.12.7) (Ref 9.1).

9.7.65 Some stakeholders have raised concerns that the Sizewell C Project's construction phase may lead to a reduction in visitor numbers and therefore their spending, affecting the overall output of the tourist economy and businesses within it.

9.7.66 Empirical evidence on this that meets the test in NPS EN-1 is difficult to extricate from the many other factors that influence tourism, and would be based on *ex-ante* perception which may not translate to actual effects.

9.7.67 Stakeholders have identified a number of risks, but there is limited empirical evidence to support the position that these would lead to likely significant effects. The following section reviews evidence from elsewhere, including how the DCO application for Hinkley Point C sought to deal with the issue.

Experience from Hinkley Point C

9.7.68 Prior to construction of the project, EDF Energy and three local authorities closest to Hinkley Point C commissioned a face-to-face survey of tourists in Somerset to understand the level of awareness of the proposals for the new nuclear power station, and to try and identify the scale of potential impacts that the project could have. At the time, the local authorities were concerned that there would be a translation from interviewees' perceptions about whether they would be more or less likely to visit the area during the construction phase, to actual quantified reductions in visitor nights and therefore expenditure.

9.7.69 However, it is very difficult to draw quantified conclusions from surveys where people are asked to estimate how they would react to a hypothetical situation. This is true generally (and evidenced by the poor predictive power of political polling) and specifically in the case of tourism. In this case, visitors were presented with (necessarily limited) descriptions of the impacts that Hinkley Point C might have, and asked what it would mean for their future visits. The survey results suggested that around 10% of future visitors would change their plans and not visit.

9.7.70 In reality, these potential changes to visitor activity have not materialised, suggesting that this is not an accurate or reliable approach to quantifying effects on the tourist economy.

9.7.71 EDF Energy and the Hinkley Point C Tourism Action Partnership (including local authorities and other tourist-sector stakeholders) in the south-west have been monitoring the effects of Hinkley Point C's construction on tourism activity, as required by the terms of that project. The latest Socio-economic Advisory Group report (SEAG, 2019) (Ref 9.47) for these potential effects sets out that anticipated negative effects have not materialised to date, local tourism business confidence (of continued visitor income) seems high, and mitigation measures provided by EDF Energy in advance have helped. These include:

- Using public relations support to deliver social media and press campaigns to promote Somerset and Exmoor as destinations.
- Providing support for tourism businesses with workshops and networking.
- Monitoring business performance and optimism.
- Supporting the DMO in Somerset and Exmoor with finance and expertise.

- Running an advertising campaign focused on target markets and off-peak seasons.

9.7.72 The Hinkley Point SEAG Tourism Dashboard (a reporting mechanism for monitoring of potential effects of the project on tourism agreed via DCO governance) states that:

> *"All metrics suggest continued growth and development and the tourism business survey shows no detrimental impact on visitor perceptions or business confidence as a result of Hinkley Point C".*

9.7.73 The same conclusion is reached in the report of Professor Glasson for the New Nuclear Local Authorities Group (Ref 9.47). This states that:

> *"Anticipated negative impacts have not materialised to date. Indeed confidence seems high. Mitigation measures, provided in advance, have helped; ……There is also the added bonus for some tourism accommodation providers of much fuller occupancy over the calendar year. Hinkley Point C itself is an added Somerset visitor attraction that is likely to become more popular"* (Ref 9.47).

9.7.74 Additionally, data on employment in tourism during the construction period of Hinkley Point C to date has showed that since development consent was granted in March 2013, tourist sector employment in Somerset has grown by 32% in Somerset and 20% in the districts closest to the Hinkley Point C site (West Somerset and Sedgemoor) (based on ONS BRES, 2013–18).

9.7.75 The sector has grown in Somerset at 3 times the rate of total employment growth during that period, and has consistently accounted for between 10% and 12% of all jobs in the County.

Experience from Sizewell B construction

9.7.76 Similar evidence of trends in tourism employment during the construction of Sizewell B also identified no impact on the tourist economy as a result of construction activities.

9.7.77 **Figure 9.6** shows a consistent time-series across public datasets for 'high-level' SIC definitions for *"hotels and restaurants"* and *"recreation and cultural"* SIC codes between 1984 and 2018 based on ONS longitudinal data. This shows the absolute number of jobs in these combined sectors in Suffolk Coastal, Mid Suffolk, Waveney, East of England and Great Britain with the Sizewell B construction period and peak, and national negative growth periods (recession) highlighted.

9.7.78 The shaded area on **Figure 9.6** is the construction period for Sizewell B. This highlights that there was only a marginal change in employment in the tourism economy relative to the total number of jobs in the local area, and that fluctuations are in line with average annual variations seen throughout the time series.

9.7.79 Additionally, in real terms the number of jobs in Suffolk Coastal increased significantly over this time, as did tourism-related jobs. Between 1987 and 1995 (the Sizewell B construction period), jobs in these sectors increased by around a third (630 jobs), while overall the total number of jobs grew by a fifth as set out in **Figure 9.7**.

Understanding potential sensitivities

9.7.80 SZC Co. recognises that while there is little or no empirical evidence from similar projects supporting direct effects of the Sizewell C Project on the tourist economy, there may be potential for:

- localised effects (the potential for very local effects on businesses and activities where there is the potential for a combination of effects);
- specific characteristics of the Suffolk coast that attract visitors to lead to greater sensitivities in terms of visitors' perceptions of the area in light of the Sizewell C Project; and
- perception-related effects as a result of sensitivities to different aspects of the Sizewell C Project (the potential for perception of changes to e.g. traffic, where this is already an influencer on propensity to visit).

9.7.81 SZC Co. set up a working group in 2015 to act as a forum presenting and reviewing baseline data collection, potential effects and develop mitigation with representatives from the local authorities (SCC and ESC), NALEP, Suffolk Coast DMO, Visit Suffolk, Visit East Anglia/East of England, Royal Society for the Protection of Birds (RSPB Minsmere) and National Trust Dunwich Heath were subsequently included in the group.

9.7.82 This process led to the development of a Tourism Survey – undertaken and produced by Ipsos MORI for SZC Co. as shown in **Appendix 9F** of this volume, with the following overarching aims:

- Target a national sample of those who have visited the Suffolk coast or who say they are likely to visit.

- Build an understanding of how construction might change visitor behaviour.
- Set out findings from exploratory qualitative research, and source ideas and suggestions for the potential use of a Tourism Fund (to be secured through the Section 106 agreement).
- Disaggregate data and look at the opinions of different types of visitors and what might influence their likelihood to visit.

9.7.83 The survey was undertaken via an online access panel, which included a screener survey to ensure a representative sample, and a short set of questions to establish eligibility resulting in an overall sample of 3,093 people completing a 20 minute survey.

9.7.84 The sample consisted of people who had visited the Suffolk coast before – mainly in the last 24 months – or who intended to visit in the future (in the next 24 months). The survey asked initial questions related to people's experience of the Suffolk coast including the things they like and dislike, the places they visit, and their visiting behaviour, before describing the Sizewell C Project, and asking a series of questions related to their prior knowledge of Sizewell C, attitudes to nuclear in general, and then perception of the Sizewell C Project in respect of their likelihood to visit more or less in the future, potential alternatives, and effects on the way they would visit.

9.7.85 The report provided in **Appendix 9F** of this volume finds, at a high level, that:

- 27% of respondents knew about the Sizewell C Project, of which 10% knew *'a fair amount or a lot'*. 72% had either never heard of the Sizewell C Project (50%) or knew almost nothing about it (22%);
- having been introduced to the Sizewell C Project via information as part of the survey, 55% said that it hadn't changed their views about whether to visit, 13% stated they were more likely to visit, and 29% stated they were less likely to visit, to varying degrees;
- 39% said they would be likely to visit less often during construction, 8% said they would be likely to visit more often, and 53% said that the construction of Sizewell C would not make a difference to how often they visit, or they didn't know how it would affect them;

- the majority of people reported that they would like to know more about the impacts of construction of the Sizewell C Project to plan future visits; and

- concerns raised included perceptions around traffic delays and availability of accommodation.

9.7.86 The survey and report do not quantify the economic effect of the Sizewell C Project on tourism – rather, the results provide information on the characteristics of people who think they are more or less likely to visit, after having considered a short summary of information about the Sizewell C Project's location and potential effects.

9.7.87 The results set out where people consider themselves less likely to visit the area around Sizewell C on the Suffolk coast, but do not consider how long these people may, or may not, stay. As set out in the report, potentially the most significant net effect is reported by those with the lowest likelihood to visit.

9.7.88 The results provide helpful information to determine the approach to managing risk via a Tourism Fund to be secured through the Section 106 agreement, as discussed in **section 9.8** of this chapter. For example, the information gained on who may consider themselves more likely not to visit and why, will enable effective mitigation to target those who report a likelihood to return less often or are less certain to return, and therefore reduce this perceived risk.

9.7.89 Those who state they are less likely to visit, or likely to visit less often in the future, are distinctive in some ways, for example:

- they are less likely to have visited recently;

- they are less likely to have visited the area immediately around Sizewell C;

- they are more likely to be unaware of Sizewell A, B or C (and have therefore gained the information about the Sizewell C Project from this survey); and

- they are more likely to be female than male.

Summary of potential effects on tourism and visitors

9.7.90 Overall, there is limited empirical evidence that the Sizewell C Project would lead to a quantifiable reduction in visitor numbers, a change in visitor

behaviour, expenditure or business viability in the sector over and above normal variation. The tourist economy is subject to substantial volatility year-on-year, and is affected by externalities beyond the effects of a single project such as Sizewell C.

9.7.91 There is no empirical evidence that the construction of Sizewell B had a substantial effect on the sector within the Suffolk coast area, or that – with a well-managed and effective mitigation package via a Tourism Fund – the construction of Hinkley Point C is having a substantial effect in Somerset.

9.7.92 However, engagement with local tourism stakeholders, review of environmental effects and mitigation identified across this **ES**, and SZC Co.'s understanding of perceived visitor sensitivities based on quantitative survey of previous and potential visitors has identified that without mitigation there is potential for:

- very local effects on businesses and activities where there is a combination of significant residual environmental effects; and
- perception-related effects as a result of sensitivities to different aspects of the Sizewell C Project (the potential for perception of changes to for example. traffic, where this is already an influencer on propensity to visit).

9.7.93 In particular, SZC Co.'s research has shown that visitors with lower levels of engagement and knowledge of nuclear generation at Sizewell or the Suffolk coast area state a higher risk of changes to visiting behaviour during the construction of the Sizewell C Project, and that this is mainly influenced by changes or perceived changes to transport at certain higher sensitivity travel times, as the nature of the market (often shorter breaks and more local c. 2 hour trips) means that good access to and around the area is important to visitors.

9.7.94 The **Transport Assessment** (Doc Ref 8.5) sets out that:

- During the early years of construction, in 2023, before any mitigation is completed, there would be impacts on the highway network particularly on the A12 and B1122. This would mean a change in journey time of up to 5% on some routes, at peak times. This is within the daily variation on these routes, so is unlikely to be noticeable.
- However, when the full highway mitigation package is in place even in the peak construction period, traffic volumes during the peak hours show only small impacts across the network, within the bounds of usual daily variation.

- Across the day, some roads would experience a notable increase in traffic volumes although road capacity would not be exceeded, and the junctions are shown to operate within capacity with the proposed mitigation in place.

- In some locations such as the B1122 through Theberton and Middleton Moor, and the A12 at Farnham and Stratford St. Andrew, significant traffic reductions are anticipated as a result of the proposed bypasses.

9.7.95 As such, in some locations, times and for some visitors, there is the risk of a **minor** to **moderate** adverse effect to arise on factors that contribute to tourist visitor sensitivity (including but not limited to traffic) that has the potential to be **significant** at the local level, without mitigation in the early years of construction.

9.7.96 As set out above, SZC Co. commissioned a survey to understand more about the perceptions of people who have previously visited or intend to visit the area, in order to gain an understanding of the demographic factors and sensitivities that should be tackled to prevent the risk of perceptions of reduced likelihood to visit materialising into an economic effect.

Effects on the agricultural economy

9.7.97 The proposed development would lead to the loss of farming activity, arable land and pasture both temporarily and permanently.

9.7.98 Some land take would occur during the construction period, with land required on a temporary (though long-term) basis to accommodate construction activities or temporary associated development and then restored post-construction.

9.7.99 As set out in **Volume 2, Chapter 17** of the **ES** (Doc Ref. 6.3) and **Chapter 10** of each of **Volumes 3** to **9** of the **ES** (Doc Ref. 6.4-6.10)**,** the Sizewell C Project (including main development site and associated developments) would permanently remove around 125.26ha of known agricultural land of which 84.3 hectares is considered 'best and most versatile' land.

9.7.100 Following the construction phase, land temporarily used for the main development site construction areas will be returned to arable agricultural land, grassland, woodland and scrub, hedgerow and wetland habitats.

9.7.101 Overall, the area of agricultural land permanently removed represents approximately 0.04% of the total c. 330,000ha of agricultural land (grades 1–5) across Suffolk as a whole (Natural England, 2019) (Ref 9.48). As a proportion of the total employment in the agricultural sector in Suffolk, this

would equate to an average loss of around 4 jobs in this sector based on average jobs per hectare in the sector in Suffolk.

9.7.102 Given the very low proportion of jobs that would be lost, the magnitude of the impacts would be very low (insignificant in terms of the sub-regional economy), and the sub-regional economy as a receptor would have very low sensitivity to the proposed changes, resulting in a negligible effect which would be **not significant** in terms of the local and regional economy.

9.7.103 Effects on individual land holdings, including changes to activity, loss of land and severance – and the compensation measures associated with them are set out in **Volume 2, Chapter 17** of the **ES**.

Effects of transport on business

9.7.104 The **Transport Assessment** (Doc Ref. 8.5) assesses the peak traffic generation for Sizewell C on a weekday, and identifies that there are no significant delays caused as a result of Sizewell C across the modelled network, during the peak construction phase.

9.7.105 The assessment identifies that during the early years of construction, in 2023, before any mitigation is completed, there would be impacts on the highway network particularly on the A12 and B1122. This would mean a change in journey time of up to 5% on some routes, at peak times. This is within the daily variation on these routes, so is unlikely to be noticeable.

9.7.106 However, when the full highway mitigation package is in place even in the peak construction period, traffic volumes during the peak hours show only small impacts across the network, within the bounds of usual daily variation. Across the day, some roads would experience a notable increase in traffic volumes although road capacity would not be exceeded, and the junctions are shown to operate within capacity with the proposed mitigation in place. In some locations such as the B1122 through Theberton and Middleton Moor, and the A12 at Farnham and Stratford St. Andrew, significant traffic reductions are anticipated as a result of the proposed bypasses.

9.7.107 The package of road safety improvements put forward in the **Transport Assessment** (Doc Ref. 8.5) would not only benefit the proposed Sizewell C Project, but would also provide a lasting legacy to residents of the surrounding towns and villages. Once the Sizewell C site is fully operational, traffic impacts are negligible with some areas showing improvement as a result of the legacy benefit of the proposed bypasses.

9.7.108 SZC Co. notes that in some instances, changes to the road network associated with the scheme, businesses may perceive a loss of passing trade which they may consider affects their business models. SZC Co. has carefully considered each of the elements of physical mitigation associated

with changes to the transport network to create an overall network that limits significant effects on travel as a result of the Sizewell C Project. People who own and occupy property (including small business premises with an annual value below a set amount) that has been reduced in value by physical factors (e.g. noise and vibration) caused by the use of a new or altered road may be able to claim compensation under the terms of the Land Compensation Act 1973.

iii. Accommodation effects

9.7.109 **Appendix 9A** of this volume identifies the NHB workforce that would be required during the construction phase, and **Appendix 9C** of this volume sets out where they would be estimated to live within a 60-minute travel time of the main development site.

9.7.110 There are uncertainties related to the locations that workers would choose to live, how many NHB workers would be required, and which sectors of the housing market they would choose to live in. The precise location that workers choose would be dependent on a number of factors, including their duration of stay; the price and type of accommodation; access to their permanent homes, park and rides and the main development site (via direct buses); and access to amenities such as sport and leisure, and, in the case of families, schools.

9.7.111 As identified in the baseline, there are substantial 'vacant' bedspaces at any given time, though this is constrained in the peak of the tourist season, and varies from place to place. Assumptions have been made relating to the likelihood/ability for NHB construction workers to take up accommodation in different sectors, for example affordability of tourist accommodation, where a discount has been applied to take account of limited affordability of much tourist accommodation.

9.7.112 As part of the embedded mitigation for the scheme a campus-based accommodation strategy would underpin the development. This would be supported by serviced-spaces for caravan accommodation. Experience at Hinkley Point C (as at April 2019) suggests that the on-site campus provided for the project is popular and sought after by contractors and that civils workers in particular are more likely to seek caravan accommodation.

9.7.113 The delivery of the campus and caravan site would reflect the numbers of workers requiring accommodation in the local area based on the workforce profile.

9.7.114 Use of existing accommodation would be required prior to the completion of any purpose built accommodation provided by SZC Co.

9.7.115 Overall, and noting that a degree of uncertainty is inherent in estimating the accommodation demand that would be generated by the Sizewell C Project, it has been concluded that a total campus provision of around 2,400 bedspaces and 600 caravan bedspaces (assuming a utilisation rate of 1.5 applied to 400 caravan plots) would be provided, for the following reasons which are outlined in more detail in the **Accommodation Strategy** (Doc Ref. 8.10).

9.7.116 As well as the avoidance of impacts on the local accommodation market, the campus accommodation is regarded by SZC Co. as essential because of availability for short stays, the ability to provide high quality and well managed amenities on-site, and the ability to manage workers' effects on the wider area. The on-site campus has additional advantages in that:

- Workers could either walk directly to site or take a very short bus journey within the site compound. This would materially reduce the trips of workers on the local road network.

- An on-site campus would be lower cost due to synergies with establishment of the main development site construction area, and the opportunity to share facilities such as utilities and security. Bussing costs of workers for off-site campus locations would also be avoided.

- An on-site campus would benefit the construction by allowing for a rapid and effective response to any on-site issues or incidents. It would benefit night shifts or those working irregular unsocial hours and assist through periods of construction which require intensive work, e.g. continuous concrete pours. This position was ratified by the preferred Hinkley Point C Civil Contractor during the Hinkley Point C examination process and has been reiterated through lessons learnt sessions with Hinkley Point C contractors and early contractor involvement for the Sizewell C Project.

- Minimising travel times between the accommodation campus and the construction area helps to increase the productivity and efficiency of the workforce through minimising the effective length of their working day and benefitting mental health by providing secure, high quality, safe and accessible accommodation close to work.

9.7.117 Sizewell B provided a successful 900-room on-site campus during construction. In 1990, the Inquiry Inspector stated that there were common sense advantages for a hostel to be located adjacent to the construction site, as this would be considerably more convenient for the occupants and the site operator, and would reduce traffic on the roads. The Inspector weighed the advantages of an on-site hostel against the possible impacts,

including concerns about disturbance to local villages, and concluded that the benefits in providing accommodation for construction workers on-site were tipped in favour, so long as it is properly managed. The on-site campus proved popular, and was regularly at capacity with average waiting lists of over 100 workers.

9.7.118 Caravan accommodation is proving popular at Hinkley Point C and therefore serviced spaces for up to 400 caravans would be created on Land to the East of Eastlands Industrial Estate in Leiston.

9.7.119 This facility would continue to be offered throughout the construction phase, providing an option to workers not wishing to use the accommodation campus or the PRS, owner-occupied sector or local tourist accommodation. Buses would run between the main development site and the caravan site.

9.7.120 An average of 1.5 workers per caravan is assumed, therefore creating a total of 600 construction workers staying at this facility. The number of workers per caravan would depend upon the size of caravans brought to site but an estimate of around 1.5 workers per caravan is considered realistic. Details of the design of the caravan site are set out in the descriptions of development in **Chapter 3** of this volume.

9.7.121 At the peak of construction, 5,884 of the 7,900 workforce would require accommodation locally (within 60-minutes of the main development site). For several years either side of peak construction, accommodation demand generated by the Sizewell C Project is expected to be much less than this.

9.7.122 The scale of the Sizewell C construction workforce, and especially the number of NHB workers who would seek accommodation in the local area, needs to be seen in the context of wider local demographics. The NHB workforce would be relatively small in number when seen in the context of the existing population of Suffolk County (equivalent to 0.7% of current population) or ESC (equivalent to 2.2% of current population).

9.7.123 In order to assess impacts more specifically, each component of the housing market has been considered separately. This includes owner-occupied housing, the PRS, and tourist accommodation. Regard has also been given to the potential supply of 'latent' accommodation, which may reduce the scale of demand in other sectors.

Owner-occupied sector

9.7.124 It is anticipated that by the time of peak construction 882 workers would have moved to owner-occupied properties. Some of these would eventually form part of the operational workforce, others would be long-term construction workers.

9.7.125 The 2011 Census identifies that there were 134,427 family homes (3+ bedrooms) in the owner-occupied sector across the 60-minute area in 2011. Since then the private housing sector has grown by approximately 4% in Suffolk, so this is considered an under-estimate.

9.7.126 As such, Sizewell C workers are likely to account for less than 1% of all family homes in the owner-occupied sector in the area – this is a small fraction of homes, and well within the average level of churn within the sector. Given the length of time these workers are likely to be involved with the Sizewell C Project, this effect would have built up over several years in advance of the peak.

9.7.127 The construction phase of the Sizewell C Project, including peak construction, is therefore expected to lead to a negligible effect overall on the operation of the overall Suffolk housing market, which would be **not significant.**

9.7.128 Workers are likely to concentrate close to the site, and this has been accounted for in ward-level modelling of the workforce by sector within the Gravity Model as set out in **Appendix 9C** of this volume.

9.7.129 **Table 9.40** sets out the effects in wards closest to the site, in the context of average annual change in the market based on household moves by tenure in 2011 (Census).

Table 9.40: Workers in owner-occupied sector accommodation in the context of stock and average annual churn

Local Wards	Workers in Owner-Occupied Sector at Peak (construction only)	Workers in Owner-Occupied Sector at Peak (operational only)	Total Stock (2011 census)	Workers as a % of Total Stock at Peak	Average Annual Build-Up	Average Annual Churn	Workers as a % of Annual Churn
Leiston	107	55	1,339	12.12%	23	102	23%
Aldeburgh	51	26	952	8.09%	11	139	8%
Saxmundham	41	21	1,107	5.57%	9	138	6%
Yoxford	19	10	520	5.56%	4	61	7%
Snape	16	8	518	4.56%	3	52	6%
Rendlesham	17	8	659	3.79%	4	90	4%
Orford and Tunstall.	9	5	449	3.18%	2	65	3%
Walberswick and Wenhaston.	11	6	567	3.04%	2	65	4%

Local Wards	Workers in Owner-Occupied Sector at Peak (construction only)	Workers in Owner-Occupied Sector at Peak (operational only)	Total Stock (2011 census)	Workers as a % of Total Stock at Peak	Average Annual Build-Up	Average Annual Churn	Workers as a % of Annual Churn
Wickham Market.	7	4	474	2.20%	1	4	3%
Halesworth	14	7	1,041	2.04%	3	129	2%

Source: Census, 2011.

9.7.130 This shows that in Leiston (for example), over 100 households in the owner-occupied sector moved in 2011 (Census). Sizewell workers would represent an average of around one in four of those moves in any given year up to the peak of construction. Elsewhere, Sizewell C workers may be expected to account for less than one in ten of annual moves per area.

9.7.131 As such, this impact is considered as being negligible at all spatial scales except for Leiston where there may be a minor adverse effect resulting in higher than usual demand for family-type accommodation for several years towards the peak. These effects would be **not significant.**

Private rented sector

9.7.132 It is anticipated that by the time of peak construction 1,200 workers would be living in private rented properties across the 60-minute area. The PRS provides options for construction workers in medium-term roles, as the shortest period for an assured shorthold tenancy is 6 months.

9.7.133 As set out in **section 9.4** of this chapter, there is a significant stock of homes and bedspaces in the sector – in 2011 there were over 99,000 bedspaces in the 60-minute area, and based on average national and regional growth rates, this may have since risen to over 128,000.

9.7.134 As such, Sizewell C workers are likely to account for up to around 1.2% of all bedspaces in the area – this is well within the overall calculated level of 'frictional vacancy' within the sector, and is therefore expected to lead to a negligible effect overall at the 60-minute area scale, which is **not significant.**

9.7.135 **Table 9.41** sets out the scale of workforce seeking PRS accommodation in the context of overall stock, vacancy and churn.

Table 9.41: Macro-level effects – non-home-based workers seeking private rented sector accommodation in the 60-minute area

Construction Workers at Peak				
(a)	Total NHB workers excl. project accommodation (campus and caravans).	2,884		
(b)	Of which seeking PRS accommodation.	1,200		
PRS Stock and Characteristics				
(c)	Total Stock of PRS Bedrooms (2011 Census).	99,033		
(d)	Total Stock of PRS Bedrooms (2019 estimate based on Strategic Housing Market Area and EHS).	128,743		
Vacancy Rates		**%**	**2011 Census**	**Potential Including Growth Since 2011**
(e)	Vacancy Rates (National – EHS 10-year average).	10.0%	10,200	13,261
(f)	Vacancy Rates (Suffolk Coastal – Strategic Housing Market Area).	8.3%	8,220	10,686
(g)	Vacancy Rates (Waveney – Strategic Housing Market Area).	6.9%	6,833	8,883
Turnover Rate		**2011 (Census) Turnover Rate in PRS in East Suffolk**		
(h)	Monthly turnover in the PRS.	2.8%		
Output		**% Spare**	**Est 'Spare' Capacity**	
(i)	Potential 'spare' capacity (est. lower range based on 2011 Census).	4.1%	4,060	
(j)	Potential 'spare' capacity (est. upper range based on potential PRS growth since 2011).	7.5%	9,656	

Source: Census, 2011; EHS, 2019; Coastal SHMA; Waveney SHMA

9.7.136 Although (as set out above) at this wider scale effects are not significant, workers are likely to concentrate close to the site, and this has been accounted for in ward-level modelling of the workforce by sector within the Gravity Model, as shown in **Appendix 9C** of this volume.

9.7.137 **Table 9.42** sets out the number of workers anticipated to seek PRS accommodation in the ten wards closest to the site, in the context of the overall stock and the frictional vacancy at ward scale.

Table 9.42: Workforce estimate in context of private rented sector stock and capacity in wards closest to the site

Local Wards	Workers at Peak in PRS	PRS Beds (2019 estimate)	% of PRS Bed Stock Taken	Frictional Vacancy Est.[8]	Exceedance of Frictional Vacancy	% of Frictional Vacancy
Leiston	392	1,461	27%	117	275	336%
Aldeburgh	105	706	15%	53	53	200%
Saxmundham	87	946	9%	67	20	130%
Rendlesham	54	957	6%	74	-20	72%
Yoxford	40	424	9%	32	-8	125%
Snape	31	456	7%	33	-3	92%
Halesworth	24	595	4%	48	-24	50%
Orford & Tunstall.	26	966	3%	72	-46	36%
Sutton	18	1,262	1%	103	-84	18%
Framlingham	16	1,100	1%	78	-62	20%

9.7.138 This analysis highlights that:

- in Leiston, Aldeburgh, Saxmundham and Yoxford the demand for PRS from the Sizewell C workforce is anticipated to exceed the frictional vacancy leading to potential major adverse effects that would be **significant** prior to mitigation. The most significant effects are identified in Leiston and Aldeburgh;

- in Rendlesham and Snape, the demand for PRS from the Sizewell C workforce is anticipated to account for between 50% and 100% of the frictional vacancy in the peak year – this is considered within the capacity required for the sector to operate, though has been highlighted as a potential risk and is considered a moderate adverse effect that would be **significant** prior to mitigation; and

- in Halesworth, Sutton, Orford & Tunstall and Framlingham, the demand for PRS from the Sizewell C workforce is anticipated to account for less than 50% of the frictional vacancy in the peak year – this is considered within the capacity required for the sector to operate and is considered a low risk that may cause minor adverse effects, that would be **not significant.**

[8] using EHS national vacancy rate for PRS and ward-level turnover rate

9.7.139 SZC Co. recognises that pre-existing housing characteristics and pressures may exacerbate vulnerability in some locations – particularly Leiston. The **Accommodation Strategy** (Doc Ref. 8.10) sets out how particular sensitivities have been identified between SZC Co. and ESC.

Tourist sector

9.7.140 It is anticipated that at the peak of construction there would be 802 workers seeking accommodation in the tourist sector within the 60-minute area.

9.7.141 As set out in **section 9.5** of this chapter and **Appendix 9D** of this volume, it is estimated that there is likely to be substantial vacancy on average across the year and even at peak months in tourist accommodation across the 60-minute area.

9.7.142 On this basis, workers seeking accommodation have the potential to generate income for tourist accommodation providers where accommodation may otherwise be unoccupied, presenting a minor beneficial effect at the 60-minute area scale, particularly during off-peak months.

9.7.143 However, SZC Co. notes that there are sensitivities within the market in terms of:

- the location of tourist accommodation – much of which is located towards the coast; and
- the location and variability in price and availability of different types of tourist accommodation, which affects occupancy.

9.7.144 This has the potential to lead to more significant local pressures on tourist accommodation.

9.7.145 **Table 9.43** sets out the number of workers predicted to seek tourist accommodation in areas close to the site at peak, set against the available and affordable stock.

Table 9.43: Workforce estimate in context of available and affordable tourist accommodation stock and capacity in wards closest to the site

Local Wards	Workers in Tourist Accommodation at Peak	Total Beds	% of Stock Used by Workers	Available/ Affordable Beds	% of Stock Used by Workers
Aldeburgh	462	1,691	27%	1,049	44%
Leiston	135	333	41%	160	84%
Yoxford	73	605	12%	335	22%

Local Wards	Workers in Tourist Accommodation at Peak	Total Beds	% of Stock Used by Workers	Available/ Affordable Beds	% of Stock Used by Workers
Saxmundham	55	423	13%	233	24%
Snape	21	411	5%	161	13%
Walberswick and Wenhaston	16	373	4%	263	6%
Southwold and Reydon	13	1,015	1%	833	2%
Orford and Tunstall	8	205	4%	126	6%
Kessingland	5	3,902	0%	1,040	0%
Hollesley with Eyke	2	274	1%	151	1%

9.7.146 This suggests that:

- Workers in Aldeburgh and Leiston may seek tourist sector accommodation equivalent to up to around 27% and 41% of the overall stock respectively.
- When discounting for availability/affordability, workers may occupy around 44% of stock available and affordable to them in Aldeburgh, and 84% in Leiston. This has the potential to result in a moderate, or major adverse effect on the accommodation sector in these locations at peak which would be significant, prior to mitigation. This assessment does not take into account the responsiveness and flexibility of the market – it assumes it is static and reflects the situation as presented in the baseline in **section 9.5** of this chapter.
- Elsewhere, negligible to minor adverse effects may occur in Yoxford, Saxmundham and Snape, though in the context of the overall stock and type of accommodation, these effects are likely to be minor and short-lived and would be **not significant.**

9.7.147 Some concern has been expressed through consultation and engagement around the potential displacement of tourists from accommodation, who are likely to have higher average daily expenditure than workers (on goods and services, not including accommodation). In effect however, this would be a commercial decision for accommodation providers, who decide whether to let accommodation to workers – within any planning or other regulatory restrictions with which they must comply.

9.7.148 The assessment suggests there would be capacity in tourism accommodation even in peak season and, where this is the case, expenditure would be additional. Even if there were to be a small level of displacement in the summer in some locations, this would likely be balanced by the benefits to providers outside of the peak season. Effects on the tourist economy more generally are assessed in **section 9.7(b)** of this chapter. Experience at Hinkley Point C (based on monitoring up to 2019) suggests that "*predictions* [made within the Socio-economic chapter of the Environmental Statement for Hinkley Point C] *for those in tourist accommodation are therefore fairly accurate at this point in time*" (Ref. 9.47).

Latent sector

9.7.149 Latent accommodation includes un-rated (i.e. not included in Visit East Anglia's database used to inform the Gravity Model) tourist accommodation, rooms for let in private homes, currently empty homes, and accommodation new to the market each year. This type of accommodation would offer an opportunity to mitigate negative effects on tourist and PRS capacity, as well as allowing local residents to benefit economically, for example, by renting out spare rooms.

9.7.150 At present, the Gravity Model makes no assessment of the likelihood of workers using latent accommodation. The stock of latent bedspaces is likely to follow the general distribution of the overall stock in family homes, rented, social rented and tourist accommodation.

9.7.151 Feedback from Hinkley Point C suggests that this type of accommodation is very popular with workers, with around 10%, of NHB workers using spare rooms in existing homes. As such, the figures presented above for worker uptake of accommodation in the PRS and tourist sectors may be considered an upper-estimate should these levels of latent accommodation be achieved.

9.7.152 Further information on the potential for the use of latent accommodation – particularly in terms of bringing empty homes back into use, and making more efficient use of existing stock, is set out in the **Accommodation Strategy** (Doc Ref. 8.10).

iv. Population change and dynamics

9.7.153 The population and demographic structure of the 60-minute travel area is likely to experience a level of change associated with the presence of a NHB construction workforce.

9.7.154 Based on assumptions set out in technical notes appended to this chapter, there would be an overall increase of 5,884 NHB workers within the 60-minute area at peak.

9.7.155 **Table 9.44** sets this distribution against average annual population turnover (new residents taken from Census 2011 data) to identify the proportion of NHB workers compared with 'usual' turnover.

Table 9.44: Non-home-based workers as proportion of annual new residents

Geography	Total New Residents in 2011	NHB Construction Workers at Peak	Annual Average Build-Up to Peak	NHB Construction Workers as % of New Residents in 2011
Local Wards				
Leiston	370	3,689	527	142%
Saxmundham	432	203	29	7%
Snape	172	76	11	6%
Yoxford	185	141	20	11%
Aldeburgh	293	644	92	31%
District				
East Suffolk.	10,068	5,580	797	8%
Great Yarmouth.	3,241	37	5	0%
South Norfolk.	7,016	61	9	0%
Mid Suffolk.	5,242	83	12	0%
Ipswich	7,513	97	14	0%
Babergh	4,688	27	4	0%
Other Scales				
60-minute area.	25,179	5,884	841	3%

Source: Census, 2011

9.7.156 **Table 9.44** demonstrates that the area which would have the largest proportionate population impact would be the local ward areas adjacent to the site – particularly Leiston – principally because of the Sizewell C Project accommodation (campus and caravan site).

9.7.157 This would likely lead to temporary (medium term) major impacts at the local ward level (Leiston) which would be **significant.** Other local wards (Aldeburgh) could also see moderate temporary (medium term) impacts in terms of population growth. Impacts are likely to be minor or negligible and **not significant** for all other areas.

9.7.158 It is not possible to identify the extent to which a population impact is beneficial or adverse, without considering the specific impacts which that

net additional population might have on public services and community cohesion, integration and sustainability, which are considered in the following sections.

v. Public services and community facilities

9.7.159 The introduction of a new NHB workforce into the 60-minute area could have impacts on demand for public services and community facilities, and the ability of service providers to respond. Demand would vary between different types of service depending on the demographic profile of the workforce (particularly age and gender) and the location of workers.

9.7.160 Current services in the area of relevance to the Sizewell C workforce may be split between the following key service providers and topic areas:

9.7.161 SCC:

- Education and social services.
- Regulatory and environmental services.
- Economic development and tourism.
- Libraries.
- Emergency planning.
- Public Health.

9.7.162 District Councils – mainly East Suffolk:

- Housing.
- Leisure.
- Economic development and tourism.
- Regulatory and environmental services.
- Emergency planning.

9.7.163 Emergency Services:

- Policing (Suffolk Constabulary).

- Fire (Suffolk Fire and Rescue).
- Ambulance (East of England Ambulance Service).
- Coastguard.

9.7.164 Health:

- Clinical Commissioning Group (NHS Ipswich and East Suffolk Clinical Commissioning Group) – commissioning services.

9.7.165 With the exception of health services, all other services are funded by a combination of council tax and central government grants and fees. Health services are funded by a grant formula from central government.

9.7.166 Where workers are living in accommodation where they pay council tax, this should in effect self 'mitigate' the impacts of their demand, and similarly where there are fees and charges for services (e.g. leisure). In theory, central government grant formulae should also respond to a changing population, however they are generally based on population estimates which do not take into account short-term migrant workers and funding may be slow to adjust.

9.7.167 It should be noted more broadly that migrant construction workers generally make a net contribution to the national exchequer on the basis that they are in work and generally of age groups (younger), and in household types (with few dependants) that make less demand on public services, for example on social services, education and acute healthcare.

9.7.168 The assessment of the key service areas below therefore identifies a 'gross' impact, based on the workforce model and spatial spread, and then a net impact on the basis of 'automatic mitigation' by services provider, and management proposals by SZC Co. for certain services. It is against the latter assessment that significance criteria are attached and any mitigation measures required.

9.7.169 This section covers all of the services listed above with the exception of Housing Services and Tourism and Economic Development (which are covered in preceding sections).

Pre-school and education – gross effects

9.7.170 Demand for education provision may arise from the children of NHB workers. **Table 9.45** shows the possible spread of workers bringing families at peak, based on:

- the owner-occupied component of the Gravity Model set out in **Appendix 9C** of this volume; and

- the number and age of children workers in this type of accommodation are predicted to bring with them based on survey information from Hinkley Point C set out in **Appendix 9B** of this volume.

9.7.171 Experience from Sizewell B and Hinkley Point C suggests that workers bringing families are likely to arrive earlier and stay longer, so it is likely that these families would build up over the period leading up to the peak.

9.7.172 The distribution of workers with children is likely to follow the spatial distribution of NHB workers in the owner-occupied sector set out in **Appendix 9C** of this volume.

Table 9.45: Spatial spread of family-type households with children in NHB workforce

Geography	Distribution of Workers In Owner-Occupied Sector at Peak	Pre-school	Primary School	Secondary School
Local Wards				
Leiston	18.7%	30	31	5
Saxmundham	7.1%	11	12	2
Snape	2.7%	4	5	1
Yoxford	3.3%	5	6	1
Aldeburgh	8.9%	14	15	3
District				
East Suffolk	83.8%	139	146	25
Great Yarmouth	1.9%	5	5	1
South Norfolk.	3.5%	9	9	2
Mid Suffolk	5.0%	12	12	2
Ipswich	4.3%	11	12	2
Babergh	1.6%	4	4	1
Other/Wider Scales				
Suffolk	94.6%	166	175	31
60-minute area	100%	180	190	33

Pre-school provision

9.7.173 Based on estimates of children of pre-school age taking up residence within the area as a result of the NHB worker population at peak, there are predicted to be between 166 pre-school aged children in Suffolk, of which around 139 would be in East Suffolk.

9.7.174 As such, against the assessed levels of sufficiency and existing and planned provision set out in **section 9.5** of this chapter, the impact at district-level and county-level is considered to be negligible and **not significant.**

9.7.175 The greatest local effects are anticipated to occur in Leiston with up to 30 estimated pre-school children at peak. Based on existing provision and childcare sufficiency set out in **section 9.5** of this chapter, local impacts are considered to be minor adverse and **not significant.**

Primary and secondary school provision

9.7.176 The way education demand interacts with current and projected education capacity depends whether the children are net additional to current demand.

9.7.177 It is likely that families living in owner-occupied family accommodation would be included in current and future projections as they would be part of the overall housing market 'churn'. Families living in the PRS however may contribute to net additional demand for school places.

9.7.178 In either case the 'revenue' cost of providing for additional pupils is formula-based and these households would also be paying council tax. Therefore the only impact would be if additional 'physical capacity' was required to meet demand, or if high levels of turnover or mobility put increasing pressure on school resources.

9.7.179 At a wider scale, the estimated 190 primary school aged children, even if all considered 'net additional' would have a negligible effect on existing capacity across the 60-minute area. Taking into account SCC forecasts for growth related to development and natural change (see **Table 9.29**) this would still be negligible at this scale.

9.7.180 However, it is noted that these effects may be localised as a result of the potential for workers to seek accommodation closer to the site. **Table 9.46** outlines the current primary school capacity in wards local to the site, and identifies the possible impact at each locality of the forecast child population if they were all net additional.

Table 9.46: Primary education capacity change as a result of forecast population increase (primary school places)

Geography	Potential SZC-Related Primary Age Children	Existing Capacity	Existing Surplus Capacity (#)	Existing Surplus Capacity (%)	Residual Surplus Capacity (#), If all SZC-Related Children Are Net Additional	Residual Surplus Capacity (#), If all SZC-Related Children Are Net Additional
Local Wards						
Leiston	31	525	165	31%	134	25.5%
Saxmundham	12	483	38	8%	26	5.4%
Snape	5	175	30	17%	25	14.5%
Yoxford	6	175	71	41%	65	37.4%
Aldeburgh	15	105	2	2%	-13	-12.3%
Wider Scales						
East Suffolk	146	15,560	2,014	12%	1,868	12%
60-minute area	190	25,416	3,123	12%	2,933	12%

9.7.181 As set out in **Table 9.29**, using SCC forecasts for demographic and housing related population change (though not including planning obligations delivering additional capacity), the above effects would be magnified, potentially leading to an exceedance of capacity in Leiston and Snape (noting that schools in Snape would already be at capacity).

9.7.182 **Table 9.47** outlines the current secondary school capacity in wards and Districts[9] across the 60-minute travel area, and identifies the possible impact at each locality of the forecast child population if they were all net additional.

Table 9.47: Secondary education capacity change as a result of forecast population increase (secondary school places)

Geography	Existing Capacity	Existing Surplus Capacity (#)	Existing Surplus Capacity (%)	Possible Secondary School-Aged Children (SZC)	Remaining Surplus Capacity If All Net Additional
Local Wards					
Leiston	560	166	30%	5	29%

[9] SZC Co. notes that SCC uses school planning areas for assessments of demand for places – however these areas are not based on 2011 Census Wards and therefore direct comparison to the outputs of the Gravity Model are not possible.

Geography	Existing Capacity	Existing Surplus Capacity (#)	Existing Surplus Capacity (%)	Possible Secondary School-Aged Children (SZC)	Remaining Surplus Capacity If All Net Additional
Saxmundham	600	126	27%	2	27%
Snape	--	--	--	1	--
Yoxford	--	--	--	1	--
Aldeburgh	--	--	--	3	--
Wider Scales					
East Suffolk	10,766	1,118	10%	25	11%
60-minute area	19,917	2,453	12%	33	12%

9.7.183 On this basis, assuming that the above represents a likely worst-case scenario (where all additional children are considered net additional), the NHB workforce could have a negligible effect at the 60-minute level, and at county and district levels, which would be **not significant.**

9.7.184 There is the possibility for a moderate adverse effect in terms or primary school capacity in Aldeburgh, based on current schools having little or no existing surplus capacity. However, within the context of small workforce children numbers, a slow ramp-up, falling birth rates and planned expansion this is likely to be **not significant** in the context of the dynamic baseline, and the net additionality of workers in this category.

9.7.185 It should be noted that as a result of decreasing birth rates – a national trend also experienced in most parts of Suffolk – school rolls at primary school level are anticipated to drop and spare capacity grow in future years. This is a background trend and would need to be considered in monitoring and planning any mitigation measures.

9.7.186 As set out in **Table 9.29**, forecasts provided by SCC identify that at around the peak of construction, there is the potential for primary schools in local wards to be operating very close to capacity. This forecast identifies very high levels of growth related to demographic change and housing growth, without factoring in additional supply driven by collection and implementation of planning obligations.

9.7.187 SZC Co. recognises that there is inherent uncertainty regarding future demand for school places, which is influenced by population factors and development. SCC are required to seek planning obligations for public services including education provision through Section 106 agreements and/or Community Infrastructure Levy regulations from development which

generates net additional change in the housing stock and therefore additional population.

9.7.188 However, in recognition that there may be a period during which funding for additional capacity from those sources catches up with demand and provision, SZC Co. will work with SCC throughout the construction phase to identify changes in capacity and demand from construction workers, and where applicable, mitigate those effects via a public services contingency fund to be secured through the Section 106 Agreement.

Social services – families

9.7.189 SCC's Social Services expenditure on children and families and may be affected by an additional 'family' population. Assumptions about the number of dependent children, and non-dependent adults likely to accompany workers at peak are set out in **Appendix 9B** of this volume.

9.7.190 It is anticipated that all family households would live in accommodation through which they would pay council tax. Those living in owner-occupied accommodation are unlikely to be additional to the current population. Net additional impact on demand for social services from workers, and their families is therefore regarded as negligible and **not significant** at all levels.

Social services – construction workers

9.7.191 SZC Co. has worked with SCC to understand existing pressures on the provision of services to support vulnerable adults, families and children in terms of the location of demand or services, and the potential effect that a NHB construction workforce may have on service delivery and perceptions of workers within the community.

9.7.192 Engagement with SCC, health stakeholders and individual service providers has identified a number of concerns, primarily related to changes in the population profile – particularly in Leiston – due to the number and narrow demographic of construction workers. These concerns are summarised here:

- potential risks to vulnerable young people and care leavers, particularly in Leiston, and particularly those who are in housing need or vulnerable to homelessness;
- potential risks related to cultural differences between NHB construction workers and residents;

- potential risks related to drugs, alcohol and prostitution including exploitation of young girls by a predominantly male workforce, and potential for related increase in trafficking;
- potential risks related to access to and delivery of sexual health services and increase in youth pregnancy;
- potential risks on the delivery of services, particularly to vulnerable older people who wish to remain in their homes but require care; and
- potential demand for social services and mental wellbeing services from construction workers and their families, and welfare in schools such as English as an Additional Language.

9.7.193 SZC Co. recognises that there may also be economic-based risks to service provision as an indirect result of job creation on the Sizewell C Project, which may lead to workforce churn that means some positions in care roles become harder to fill.

9.7.194 SZC Co. recognises that the Sizewell C Project has the potential to increase the risks set out above, and has identified mitigation measures in order to avoid or reduce the risks through direct interventions including:

- Linking implementation strategies with priority social services target groups, for example so that outreach programmes target children not in education, employment and training (NEETs) and other vulnerable groups – see **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9). The measures within the **Employment, Skills and Education Strategy** would be secured by a Section 106 Agreement.
- Supporting community engagement as set out in the **Code of Construction Practice** (**CoCP**) (Doc Ref. 8.11), to address any issues that may arise from members of the public and especially vulnerable residents who access key public services.
- Working bilaterally with those organisations closest to the Sizewell C Project that raise safeguarding concerns to identify practical and effective solutions built in to a **Community Safety Management Plan** (Doc Ref. 8.16) and Worker Code of Conduct.
- Providing community information and worker information to promote integration and awareness via 'welcome packs' for contractors and workers and briefings for public service providers.

- Embedding vetting and security checks into recruitment and contracting, as set out in the **Community Safety Management Plan** (Doc Ref. 8.16).

- Managing workforce accommodation and building in measures to reduce risks in the design – including provision for emergency services presence, welfare, food/drink and recreation activities for workers at the accommodation campus, and physical and temporal separation of use of shared recreational facilities in Leiston.

- The provision of occupational healthcare for workers at the main development site including mental wellbeing services – this is set out in more detail in **Volume 2, Chapter 28** of the **ES**.

9.7.195 As a result of the mitigation, the Sizewell C Project is likely to have a negligible effect on the provision of social services at county level (Suffolk), though more localised effects in areas such as Leiston may be minor adverse.

Other county-level services

9.7.196 Due to the demographic profile of the NHB workforce – mainly single, male and of working age – their likely shift patterns, and the temporary nature of much of the workforce – impacts on other SCC run services for example libraries, arts and other cultural services are assumed to be negligible.

Formal sport and leisure

9.7.197 The NHB workforce is likely to create some additional demand for formal sport and leisure provision.

9.7.198 In order to assess the overall scale of the potential demand for formal sport and leisure services, the anticipated demographic profile of the NHB workforce has been applied (with caveats) to:

- Sport England's Sports Facilities Calculator, both for the peak and the average workforce, to identify the likely demand for provision; and

- local authority standard rates for sports facility demand.

9.7.199 Details of the audit of existing provision, approach to assessing demand based on published standards and in terms of local demand and demographic specific demand are set out in **Appendix 9E** of this volume.

9.7.200 This highlights the overall requirements for formal sport and leisure facilities across the 60-minute travel area arising from the NHB workforce in terms of facilities and proportions of facilities.

9.7.201 Sport England has produced typologies of demand for a wider range of sports, based on key demographics such as age, gender and employment. For the demographic of NHB workers, football and going to the gym are by far the activities most in demand, along with cycling which is undertaken by a much smaller proportion. There is very limited demand for swimming and racquet sports.

9.7.202 Demand for sports facilities is predicted to be very modest, and is likely to be able to be met from existing provision. The exception to this is where there is already a significant deficiency in sports provision by type, or location, for example synthetic pitches, although the increased demand would in any case be small.

9.7.203 Those workers living in PRS and owner-occupied sector accommodation would contribute to the revenue costs of service provision through council tax. In addition, most council leisure services are subject to fees and charges and users would therefore be making a net contribution to that provision.

9.7.204 SZC Co. would also provide sports and leisure facilities as part of the Sizewell C Project. This would include gym and informal recreation facilities at the accommodation campus, and formal recreation facilities including a full-size 3G pitch and MUGAs located off-site at Alde Valley School. The off-site facilities would be made available for shared used by the school and the local community and would remain as a legacy post-construction.

9.7.205 This would meet the main likely preferences of the construction workforce. The impact on leisure provision is therefore likely to be major beneficial and **significant** at all levels, as a result of meeting workforce demand and providing permanent new facilities for the community.

Regulatory and environmental services

9.7.206 The district council (ESC) provides a range of regulatory and environmental services. These include:

- Waste collection.
- Street cleaning.
- Food safety, health and safety, pest control and public health.

9.7.207 It is likely that a net temporary increase in population would require a proportionate increase in the delivery of these types of services although there is no detailed method for identifying impacts on specific services.

9.7.208 Those workers living in PRS and owner-occupied sector accommodation would already be paying for these services through council tax. In addition, all accommodation providers (including the campus and caravan site, and tourist accommodation providers who may pay business rates) would be required to pay for waste collection. As set out in the **Sizewell C Waste Management Strategy** in **Volume 2, Chapter 8** of the **ES**, SZC Co. will seek to reach an agreement with a commercial waste contractor to collect waste from accommodation campus and caravan facilities.

9.7.209 There may be a small increase in demand for services other than waste collection – which the facilities manager or SZC Co. would be required to pay for – as a result of workers living in project accommodation (i.e. campus or caravan sites), and temporary accommodation in the tourist sector. The proportion of the peak workforce who would live in these types of accommodation represents a temporary increase in population of less than 2% in ESC district at peak, and this would therefore represent a negligible effect at the local level.

9.7.210 Due to the location of project accommodation, and the propensity of workers to live as close to the site as possible, there is likely to be a local concentration of workers in Leiston and other wards to the east of the A12. In these areas, the change is likely to be greater as set out in **Table 9.48**. However, as services are provided at a Local Authority (District) scale, it is not relevant to consider the local significance of effects.

Table 9.48: NHB workers in non-council-tax accommodation

Geography	NHB Workers in Non-Council-Tax Accommodation	Total Population (2017)	NHB Workers in Non-Council-Tax Accommodation as a Proportion of Total Population
Local Wards			
Leiston	3,135	6,472	48.4%
Saxmundham	55	5,625	1.0%
Snape	21	1,957	1.1%
Yoxford	73	1,977	3.7%
Aldeburgh	462	3,230	14.3%
Districts			
East Suffolk	3,801	246,900	1.5%
Great	0	99,400	0%

Geography	NHB Workers in Non-Council-Tax Accommodation	Total Population (2017)	NHB Workers in Non-Council-Tax Accommodation as a Proportion of Total Population
Yarmouth			
South Norfolk	0	135,500	0%
Mid Suffolk	0	101,500	0%
Ipswich	0	138,500	0%
Babergh	0	90,800	0%
Other/Wider Scales			
Suffolk	3,801	757,000	0.5%
60-minute area.	3,802	316,683	1.2%

Source: ONS mid year population estimates, 2018

vi. Crime, anti-social behaviour and policing

9.7.211 An increase in population arising from the NHB workforce could have impacts on crime and anti-social behaviour, and consequent impacts on the requirement for policing services.

9.7.212 Likely impacts on crime are difficult to estimate as they would depend on both the behaviour of workers and the behaviour of current residents.

9.7.213 Using the experience of construction of Hinkley Point C and Sizewell B stations as a guide, there are indications that some increases above the norm in petty crime and behavioural offences, such as drunkenness, minor public disorder, and car theft could occur. Local experience at Sizewell B noted that the introduction of appropriate mitigation measures meant that rates fell even with major increases in the construction workforce.

9.7.214 Increases in traffic could increase road accidents – this is considered in **Chapter 10** of this volume and the **Transport Assessment** (Doc Ref. 8.5). **Chapter 10** and the **Transport Assessment** set out that:

- When the full highway mitigation package is in place even in the peak construction period, traffic volumes during the peak hours show only small impacts across the network, within the bounds of usual daily variation.

- Across the day, some roads would experience a notable increase in traffic volumes although road capacity would not be exceeded, and the junctions are shown to operate within capacity with the proposed mitigation in place.

- However, the B1122 through Theberton and Middleton Moor, and the A12 at Farnham and Stratford St. Andrew, show significant traffic reductions as a result of the proposed bypasses.

- Journey times across the network could increase slightly on some routes, though in the majority of cases the increases would be indistinguishable from daily variation in travel time.

- On some routes journey times would reduce significantly as a result of the proposed mitigation.

- During the early years of construction, in 2023, before any mitigation is completed there would be significant effects on the highway network particularly on the A12 and B1122, so there would be a need to bring forward delivery of the major highway schemes as soon as practical i.e. A12 / B1122 roundabout, two village bypass and the Sizewell link road.

- During construction, there will be large components which will be transported by road in the form of abnormal indivisible loads. In order to mitigate the potential disruption associated with these large and slow-moving vehicles, regular liaison with the emergency services and the highway authorities will enable the effective management of these deliveries. Details of these measures are provided in the **Construction Traffic Management Plan** (**CTMP**) (Doc Ref. 8.7).

- In the event of traffic disruption on the network, the **Traffic Incident Management Plan** (**TIMP**) (Doc Ref. 8.6) will mitigate the potential exacerbation of traffic delays.

- The package of road safety improvements put forward in the **Transport Assessment** would not only benefit the proposed Sizewell C Project, but would also provide a lasting legacy to residents of the surrounding towns and villages. Once the Sizewell C site is fully operational, traffic impacts are negligible with some areas showing improvement as a result of the legacy benefit of the proposed bypasses.

9.7.215 SZC Co. has been working with Suffolk Constabulary to anticipate the potential effects that might occur, on the assumption that a small proportion of NHB workers and their families, like the current population, could be both perpetrators and victims of crime.

9.7.216 As noted in the baseline assessment, rates of crime and disorder vary between different parts of the county with lower rates in the more rural areas and higher rates (although at or slightly below the national average) in urban areas and areas with a higher rate of deprivation.

9.7.217 **Section 9.5** of this chapter identifies that there were 54,124 total recorded crimes in Suffolk in 2018, at a rate of 71.5 crimes per 1,000 population per year. It should be noted that a substantial proportion relate to domestic violence – which has been raised as a potential concern at Sizewell C through engagement with Suffolk Constabulary.

9.7.218 Application of overall rates in Suffolk to the peak NHB workforce and their families – 5,884 NHB workers at peak – would equate to a proportional increase of 0.8% of current recorded crimes in Suffolk at the peak year of construction, if there is a direct proportional relationship between population and recorded crime.

9.7.219 For the average annual NHB workforce across the construction period, this would equate to an increase of around 0.4% of current recorded crimes per year if there is a direct proportional relationship between population and recorded crime.

9.7.220 Police services are paid for through a combination of central government funding (around 70%) and council taxes collected locally. The central funding is disaggregated based on a range of demographic, social, economic and crime indicators.

9.7.221 NHB workers living in the PRS and owner-occupied sector, and all households with families and dependants, would have their services funded through normal mechanisms like any other local resident. They would in most cases be occupying accommodation that would otherwise be occupied by other residents.

9.7.222 This would leave a potential net increase of around 0.5% of current recorded crimes at peak if there is a direct proportional relationship between population and recorded crime.

9.7.223 There is the potential for crime and disorder to be concentrated in locations where there would be a significant concentration of NHB workforce. It is anticipated that the majority of workers in non-council-tax accommodation at peak would be living either in project accommodation or tourist accommodation close to the site, so the majority of these effects would occur in the Leiston neighbourhood area.

9.7.224 If the recorded crime rates are applied to the number of NHB workers and their families in this area, prior to any mitigation this may lead to an increase in recorded crimes of up to 19.5% at the peak.

9.7.225 Therefore, before mitigation, there could be a moderate adverse effect which would be **significant** at peak at the local scale. The effect would be negligible and **not significant** in all other areas and at wider scales.

9.7.226 There would be a number of mitigating factors leading to the potential increase in local recorded crime being substantially reduced, including embedded design measures and tertiary measures such as the **Worker Code of Conduct.**

9.7.227 Additionally, experience from monitoring at Hinkley Point C (Ref 9.47) (which draws on Avon and Somerset Constabulary data (2018); SEAG Dashboard - Community Safety; and a 'fear of crime' survey) has identified that (partly as a result of mitigation measures and workforce management) - *précis:*

- In the period Dec 2016 to Dec 2018, a total of 202 instances of reported crime have been linked directly to the Hinkley Point C Project; a general increase in reported crimes over the 2016–18 period, with the exception of sexual assault, which was relatively stable. This follows national trends.
  - The trends in the Hinkley zone are not exceptional to the trends in Somerset as a whole, and hate crime in the Hinkley Zone declined in the latest quarter, contrary to a countywide increase.
  - In mid-2017, Avon and Somerset Constabulary noted a small increase in criminal and non-criminal activity resultant of, and against the Hinkley Point C workforce.
  - The level of criminal activity linked to Hinkley Point C and instances of non-criminal activity linked directly to Hinkley Point C did increase more substantially in the period from mid-2017 to mid-2018, but the increase was less than proportionate to the size of the workforce increase.
- Overall, the Worker Code of Conduct appears to be working effectively.
- There is a biennial Sedgemoor District Council survey on fear of crime. The Community Safety Dashboard reports no increase in the fear of crime locally over the construction period. Data from the Sedgemoor Crime and Anti-Social Behaviour Report confirms this, comparing 2017 with 2015. The percentage of Sedgemoor residents who feel very/fairly safe at home during the day has dropped by one percentage point between 2015 (95%) and 2017 (94%).

- A particularly anticipated local concern was the impact of a largely male workforce on the local night time economy, especially in Bridgwater. Whilst there have been some reported episodes, overall the recorded level of crime in Bridgwater Town Centre has shown a fall rather than an increase over the 2016–2018 period from 216 in the 6-month period to December 2016 to 131 in the six month period to December 2018. The number of recorded crimes for the Stogursey Parish, adjacent to the site, has also remained consistently low (between 2 and 11 crimes per 6 month period) over this timescale.

- There has been an issue with fly parking in 2018, causing public concern and high levels of complaints in several locations.

9.7.228 This feedback suggests that potential crime rate increases and their significance rating identified above may be considered an overestimate, and that mitigation proposals would be effective to reduce the significance.

9.7.229 SZC Co. recognises through engagement with Suffolk Constabulary, that recorded crimes (the metric used in this assessment) are only one contributor towards police resourcing, and that information on response to non-reported incidents and dealing with crimes not categorised by the Home Office definitions can lead to greater demand for police resourcing.

9.7.230 Potential effects related to major accidents and disasters, and measures to reduce, avoid or mitigate them are set out in **Volume 2, Chapter 27** of the **ES**, Major Accidents and Disasters.

vii. Fire and rescue service

9.7.231 The construction phase of Sizewell C could potentially impact on the Suffolk Fire and Rescue Service in three ways:

- potential incidents on the site, increasing both demand and type of incidents the service is required to respond to (and therefore demand for different skillsets);

- any increase in demand arising from the temporary increase in population caused by the construction workforce; and

- any increase in demand for community information and awareness training (e.g. home safety checks, traffic awareness talks in schools).

9.7.232 It is not possible to quantify these impacts as they would be based on responses to specific incidents, or would be ad-hoc, service level decisions regarding the provision of information and awareness to the community.

9.7.233 In relation to on-site incidents SZC Co. would have procedures in place to ensure that contractors operate safely and are able to effect rescue from any equipment they bring on to the main development site. Equipment, resources and training would also be put in place to ensure that the site could support contractors' rescue and provide first response to any fire incidents. Further information on this may be found in the **Community Safety Management Plan** (Doc Ref 8.16) and in the **Code of Construction Practice** (Doc Ref 8.11).

9.7.234 Through engagement with Suffolk Fire and Rescue Service, and their response to public consultation (see **Consultation Report** (Doc Ref. 5.1), concern has also been raised related to the potential effects on fire service ability to respond to incidents in local communities as a result of traffic delays and loss of on-call firefighters into the Sizewell C on-site fire and rescue team.

9.7.235 As set out above under 'Crime, Anti-social Behaviour and Policing', the **Transport Assessment** (Doc Ref. 8.5) summarises the potential effects on the road network that may influence response times, and where potentially adverse, identifies mitigation to address this through the **CTMP** (Doc Ref 8.7) and the **TIMP** (Doc Ref 8.6).

9.7.236 Experience at Hinkley Point C has shown that on-call firefighters may indeed seek work on the Sizewell C Project but that it is possible for people to secure work on the on-site fire and rescue team and maintain their roles as on-call firefighters in the community. Indeed, this may be an advantage as rather than holding day jobs in non-related areas such as supermarkets, working for the on-site fire and rescue team is improving their training, skills and experience which should also benefit the community.

9.7.237 Funding for fire services comes from two principal sources: a central government grant, and a levy on the council tax collected locally. In relation to any increase in services required as a result of NHB workers, those workers in owner-occupied and private rented accommodation would be contributing to the cost of fire services. For workers living in project accommodation, SZC Co. would operate in line with statutory fire safety requirements.

9.7.238 Any additional impacts on services (apart from any possible large scale incidents which are dealt with in **section 9.8** of this chapter) are likely to be small and relate either to residents in latent and tourist accommodation and the Suffolk Fire and Rescue Service role in dealing with road traffic accidents. Overall, effects of the Sizewell C Project on fire and rescue services are likely to be minor adverse, and **not significant** at the local level and negligible and **not significant** at the county level before mitigation.

9.7.239 However, it is noted that this may increase pressure on local services and the types of activities required disproportionately, as a result of the relative remoteness of the site and its access requirements for a nuclear construction site, as well as a potential rise in demand for home safety checks. As such, under certain conditions a minor adverse effect may arise before mitigation, and therefore SZC Co. will seek to develop a responsive mitigation strategy and relevant financial contributions in this regard, as discussed in **section 9.8** of this chapter.

viii. Health and ambulance services

9.7.240 Effects on residual demand for health services and ambulance services are considered in **Chapter 28** of **Volume 2** of the **ES**, Health and Wellbeing.

ix. Community cohesion and integration

9.7.241 SZC Co. recognises that there may be challenges in integrating a workforce with specific characteristics and needs into an existing community, and aims to work with local stakeholders and service providers, and contractors to ensure that the workforce can as closely as possible integrate with the existing community, and vice-versa.

9.7.242 The Government's Integrated Communities Strategy Green Paper (Ref 9.6) sets out definitions of community integration and potential reasons for division. It identifies that integration is not assimilation, and that:

> *"communities where people live work learn and socialise together, based on shared rights, responsibilities and opportunities – underpinned by a shared set of British values – tolerance, freedom and equality of opportunity – which have helped make Britain one of the most successful multi-faith, multi-ethnic societies in the world"* (Ref 9.6).

9.7.243 The Green Paper sets out the key target areas that should be investigated by local government, business, voluntary and community sectors to ensure integrated communities – many of which would form a fundamental part of SZC Co.'s primary and tertiary mitigation for Sizewell C as set out in **Table 9.49**.

Table 9.49: Integrated Communities Green Paper 'integration initiatives' and SZC Co.'s proposed actions to mitigate/avoid potential significant adverse effects at Sizewell C

Green Paper Integration Initiatives	SZC Co. Initiative for Sizewell C
Support for Migrants	
• Review of impact of English language requirements on visas, and future	SZC Co. recognises that some NHB construction workers would require information about the area

Green Paper Integration Initiatives	SZC Co. Initiative for Sizewell C
requirements. • Review of Life in the UK Test. • Potential provision of information on life in the UK for prospective migrants. • Provision of information for recent migrants to support integration.	and local cultures and services/facilities, and help to access public services (e.g. through translation) and community facilities. Welcome packs and information would be provided on induction to the Sizewell C Project, and SZC Co. would work to ensure the workforce understand the local environment e.g. the location and population of communities, and how and where to access community facilities and public services. This would be via regular engagement with contractors and workers through channels including the accommodation management system and occupational health services, and via re-induction and information updates for workers and contractors.
Support for Young People	
• Help ensure school intake is representative of the wider area and promote mixing arrangements between schools in areas of high segregation. • Promote British values across the curriculum. • High standard of safeguarding. • Promote meaningful social mixing.	SZC Co. have identified the potential for uptake of school places by workers' children, and set out that potential effects are likely to be not significant. SZC Co. would require contractors to support and promote a Worker Code of Conduct.
English Language	
• Potential new strategy for English Language in England/new community-based English language programme/improved provision of English language learning (integration areas)/new network of community-based conversation clubs.	The UK construction workforce has a high level of English language proficiency. However, as a contingency measure, SZC Co. would work with Tier 1 contractors to ensure translation services are available.
Economic Opportunity	
• Additional funding for Jobcentre Plus to support people from most segregated communities. • Support economically inactive people through pathways to work. • Support people from ethnic minorities into work in places where there is a gap in employment rates. • Increase take up of apprenticeships by people in isolated communities.	SZC Co.'s plans to enhance local employment, skills and education benefits include: • Development of a series of outreach initiatives to maximise opportunities for people to gain employment during the Sizewell C Project. • Partnerships with local organisations to deliver an employment brokerage, to place people into sustainable employment. • Measures to identify and address barriers to work for target groups including the unemployed and young people NEETs.
Challenge Practices That Can Hinder Integration and Equal Rights	
• Empower marginalised women/understand ways overseas influences can undermine attitudes to rights and freedoms in the	SZC Co. has a commitment to enhance the diversity of the construction workforce, for example by raising the profile of women in

Green Paper Integration Initiatives	SZC Co. Initiative for Sizewell C
UK/support faith communities and interfaith dialogue/support delivery of the Hate Crime Action Plan.	construction. SZC Co. would enforce a Worker Code of Conduct that would not tolerate hate crime or discrimination and would work with Suffolk Constabulary to address any potential significant effects. SZC Co. has prepared an **Equality Statement** (Doc Ref. 5.14) to accompany the DCO application.
Shared Space and Facilities	
• Support for shared community activities through culture and sport – including working with Sport England to use sport to bring people together. • Support for shared community spaces – including community hubs and libraries, and parks which help to create a sense of place and foster local residents' pride.	SZC Co. has listened to feedback from public consultation and will deliver as part of the Sizewell C Project: • A visitor information centre that can be accessed by the community and community organisations, including schools. • Shared sports facilities to enhance community provision, left as a legacy.

9.7.244 SZC Co. recognises that the Sizewell C Project would lead to changes in population and demographics within local communities during the construction phase.

9.7.245 This assessment considers how measures have been designed to manage the Sizewell C Project's construction workers, their use of and access to public services, accommodation and community facilities, and how measures have been designed to promote integration, manage community safety and perceptions of safety to reduce potential effects on community cohesion to minor adverse (**not significant**).

9.7.246 The success of these initiatives would be reported through workforce monitoring to track the location, accommodation sectors and overall number of construction workers on the Sizewell C Project, as well as through continual feedback from the community via community liaison services, as discussed in the **CoCP** (Doc Ref. 8.11).

c) Operation

i. Employment

Operational workforce

9.7.247 The operational workforce would start to build up gradually from around year five of the construction phase. At full operation, up to twelve years after the start of construction, when all construction activity has been completed, there would be around 900 workers at Sizewell C, of which 700

are expected to be permanent staff and 200 contractors. Contractor support would increase by approximately 1,000 workers during each unit's refuelling/maintenance outages (every 18 months).

Local recruitment

9.7.248 Based on 2011 Census travel to work data, around 61% of the workforce in the workplace zone in which Sizewell B is located live in the former SCDC, and around 23% live in the former WDC – the remaining 16% live in Ipswich (5%), Great Yarmouth (2%), Mid Suffolk (2%), South Norfolk (2%) or further afield.

9.7.249 It is anticipated that the operational workforce at Sizewell C would follow a similar pattern.

9.7.250 Information from Sizewell A and Sizewell B suggests a low local recruitment ratio, usually from 5% to 15%, for the managerial and technical category, but much higher ratios for administrative and clerical (55 to 85%) and the largest category, industrial staff (50 to 70%).

9.7.251 **Table 9.50** shows the recruitment assumptions for the directly employed operational workforce. The predictions in this table suggest relatively high local recruitment figures, taking into account:

- the likelihood of some transfers from Sizewell B; and
- aspirations from SZC Co. and the local authorities to strongly encourage local recruitment through a number of channels set out in the **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9).

Table 9.50: Estimated local recruitment of operational workforce

Occupation Type	Total	Local		Non-Local	
		%	Estimate	%	Estimate
Management, Professional and Technical	180	15%	30	85%	150
Administrative and Clerical	60	70%	40	30%	20
Process, Elementary and Trades	460	65%	300	35%	160
Total	**700**		**370**		**330**

9.7.252 This suggests that around half of the permanent operational staff would be home-based i.e. drawn from a pre-existing residential population in the area. The remaining workforce would be non-home-based – though are

anticipated to move permanently to the area (as jobs are permanent) and would therefore become local residents.

9.7.253 In addition, it is estimated that there would be up to 200 contract workers working on the operational station at any one time; these are more likely to be from outside the local area, and many may be NHB.

9.7.254 This workforce is included in the overall Workforce Profile described in **Appendix 9A** of this volume, and begins to build up from year five of the Sizewell C Project. The precise levels of local recruitment at any one point are likely to vary depending on a variety of factors including the operational requirements at the time and SZC Co.'s overall workforce management strategy in relation to its nuclear fleet. There is likely to be some fluidity between the different station workforces.

9.7.255 When operational, Sizewell C would cause an increase of 36% in jobs within energy generation sector in Suffolk (based on 2018 ONS BRES data which shows there are currently 2,500 jobs in SIC 351: Electric Power Generation, Transmission and Distribution). This would represent a beneficial effect in terms of the policy aspirations of the local authorities, LEP and the sub-regional economy. This would be a moderate beneficial effect at the local level which would be **significant**.

Outages

9.7.256 During the operational phase, there would be a number of planned outages, which would require a short-term, temporary additional workforce at the Sizewell C site at regular intervals.

9.7.257 The outages would occur every 18 months or so per unit, and on average last up to two months.

9.7.258 A short-term, temporary workforce of approximately 1,000 would be required in addition to the 900 operational staff per outage. It is estimated that the majority of the annual temporary outage workforce would be recruited from outside the local area (around 85%), and that there would be some continuity of employment between the current (Sizewell B) and future (Sizewell C) outage teams – thereby minimising any additional new employment, but increasing the frequency for current contractors.

9.7.259 Sizewell B is due to be decommissioned in 2035[10], however may be subject to a lifetime extension, in which case there may be a period where outages would be required for both stations.

[10] https://www.edfenergy.com/energy/power-stations/sizewell-b

9.7.260 It is therefore anticipated that around 850 outage workers would be non-local and require accommodation in the area. There is likely to be an impact on local accommodation, including tourist accommodation. A small proportion would take up spare rooms in houses (latent accommodation) based on previous experience, and – at Sizewell B - this is usually facilitated by people advertising in local shops, at the power station itself, and in newspapers.

9.7.261 Survey information from a recent (2016) outage at Sizewell B (Ref 9.49) identified that:

- Around 85% of workers were staying in temporary accommodation, of which:
  - 22% had a private rented tenancy (though these may be more likely to be short-term agreements for use of spare rooms, rather than an assured shorthold tenancy);
  - 15% were renting spare rooms; and
  - 63% were in tourist accommodation (split evenly between self-catering and serviced accommodation).
- Around 59% shared accommodation.

ii. Wider economic effects

9.7.262 It is anticipated that Sizewell C power station operational employment would be attractive to the local workforce as a result of the traditionally high level of wages in energy generation. Stakeholders are keen to develop the external image of Suffolk as an advanced economy meeting the wider economic aspirations of the Energy Coast initiatives within NALEP, to diversify the economic base, address pockets of deprivation, improve the skills base in the long-term (especially in engineering and construction) and attract and retain more workers (especially younger workers, and those who have left Suffolk to go to university elsewhere who may not otherwise return to the area).

9.7.263 The operational Sizewell C power station would provide a long-term continuation of a substantial quota of skilled and secure jobs for local people with a major energy sector employer.

9.7.264 At full operation, the indirect employment effects and the increase in the level of income in the local economy would be of a more permanent nature.

9.7.265 Indirect economic benefits would be generated through:

- earnings of operational staff; and
- local contracts placed during operation.

Local indirect employment

9.7.266 The average earnings of Sizewell C power station employees (both construction and operational) would be substantially above the average for the area and would give a major boost to local average earnings, and to local services.

9.7.267 Figures for earnings generated by the Sizewell C power station may be of the order of £44.5 million per annum. Previous studies suggest additional local indirect employment of about 60% of direct employment, which would be in the order of approximately 360 jobs for the proposed operational Sizewell C station.

9.7.268 The approximately 1,000 outage workers would also be likely to have multiplier expenditure and employment impacts, proportionately more akin to those for un-accompanied NHB construction workers.

9.7.269 The combined indirect economic effect of earnings and expenditure by operational staff and outage workers is anticipated to be a moderate beneficial effect which would be **significant**.

Business and supply chain

9.7.270 The Sizewell C Project would provide opportunities for business growth, both directly associated with contracts, and also indirectly in supporting sectors.

9.7.271 Overall the development is likely to contribute to longer term economic stability in the area. It should also provide opportunities for the development of local firms with both nuclear construction and operational phase supply chain links, which would help to raise the skill level and presence of energy sector activity in the area.

9.7.272 Overall this should lead to growth in a key sector that is complementary to more traditional sectors (e.g. manufacturing) in the region, offering high quality employment and opportunities for local businesses through an intensive construction period and a prospective operating lifetime of around sixty years.

9.7.273 The indirect economic effect of supply chain and procurement of goods and services for the operational power station is anticipated to be a moderate beneficial effect which would be **significant**.

iii. Accommodation

9.7.274 It is SZC Co.'s existing policy that all operational permanent staff should live within 25 miles of the station. As set out above, information from the 2011 Census shows that around 61% of the workforce in the workplace zone in which Sizewell B is located live in the former SCDC, and around 23% live in the former Waveney District – the remaining 16% live in Ipswich (5%), Great Yarmouth (2%), Mid Suffolk (2%), South Norfolk (2%) or further afield.

9.7.275 It is similarly envisaged that the non-local outage workforce would be accommodated in the same area for the duration of their activities.

9.7.276 In terms of accommodation sectors, studies at a number of power stations show that permanent employees in the electrical supply industry have higher rates of owner-occupation than the national average. Ownership rates are particularly high for staff employees. In the absence of any public sector provision, it is anticipated that most of those not buying would rent in the private sector. As such, the approximate tenure mix at full operation is estimated to be around 80% owner occupation, and around 20% private rented.

9.7.277 The anticipated demand in total for owner-occupied sector and PRS accommodation is low in comparison with the construction phase, and as the demand is likely to be spread over a number of years, coinciding with the rundown of construction (and the release of some accommodation previously used by construction workers), it is not expected that there would be any adverse effects in meeting the accommodation demands associated with the operational phase.

9.7.278 **Table 9.51** provides an estimate of the geographical distribution of operational staff accommodation, based on the premise that the pattern would be similar to that for the current operational Sizewell B.

Table 9.51: Estimated geographical distribution of the operational workforce, by accommodation type – at full operation

Geography	Owner-occupied		Rented		Total	
	%	Number	%	Number	%	Number
Local Authority District						
East Suffolk	68%	609	17%	152	85%	761
Suffolk Coastal	49%	441	12%	110	61%	552
Waveney	19%	168	5%	42	23%	210
Ipswich	4%	34	1%	8	5%	42
Great Yarmouth	2%	16	0%	4	2%	20

Geography	Owner-occupied		Rented		Total	
	%	Number	%	Number	%	Number
Mid Suffolk	2%	16	0%	4	2%	20
South Norfolk	2%	14	0%	4	2%	18
Broadland	1%	6	0%	1	1%	7
Elsewhere	3%	29	1%	7	4%	36
Total	**80%**	**720**	**20%**	**180**		**900**

9.7.279 Based on existing supply and frictional capacity set out in **Appendix 9D** of this volume, there would be a negligible effect on local accommodation demand which would be **not significant**.

iv. Public Services

9.7.280 The operational workforce would have become established over the time of the construction period and become part of the permanent population of the area. Any impacts on education and public services would therefore have already been mitigated during the construction phase. As occupants of PRS or owner-occupied sector accommodation, the workforce would be council taxpayers and entitled to public services in common with other residents.

9.7.281 As such, the impact of the net additional operational workforce on demand for public services is considered to be negligible and **not significant.**

v. Community cohesion and integration

9.7.282 SZC Co. recognises that there may be challenges in integrating a workforce with specific characteristics and needs into an existing community and would work with stakeholders, service providers and contractors, to ensure that the workforce can as closely as possible integrate with the existing community, and vice-versa.

9.7.283 The build-up in operational workforce would commence in year five and peak at year 12, with a relatively shallow build up over time that would be well within average annual turnover. Some residents would be recruited locally, of which some may transfer from Sizewell B, and some would be new to the area.

9.7.284 Given the scale of change, the potential effects on community cohesion and integration are assessed as negligible and **not significant.**

d) Inter-relationship effects

i. Construction

9.7.285 Where relevant, the socio-economic assessment inherently includes inter-relationship effects on receptors related to other environmental aspects – for example, effects on emergency service provision refers to the socio-economic effects of the workforce, along with changes to response times reported in the **Transport Assessment** (Doc Ref 8.5).

9.7.286 As such, where relevant, primary and tertiary mitigation developed for the socio-economic assessment includes measures that cross-cut environmental aspects as described in **section 9.6** of this chapter, for example primary and tertiary measures set out in the **Community Safety Management Plan** (Doc Ref 8.16), the **Code of Construction Practice** (Doc Ref. 8.11) and the **Traffic Incident Management Plan** (Doc Ref. 8.6), **Construction Traffic Management Plan** (Doc Ref. 8.7), and the **Construction Worker Travel Plan** (Doc Ref. 8.8).

9.7.287 The **Community Impact Report** (Doc Ref 5.13) sets out where receptors will experience one or more significant effects across different environmental topics on a local community basis, and signposts to the full assessment (and subsequent development of mitigation).

ii. Operation

9.7.288 No further inter-relationship effects have been identified.

9.8 Mitigation and monitoring

a) Introduction

9.8.1 Where possible, mitigation measures have been proposed where a significant effect is predicted to occur. Primary and tertiary mitigation measures which have already been incorporated within the design of the proposed development are detailed in **section 9.6** of this chapter.

9.8.2 This section describes the proposed secondary mitigation measures for the socio-economic assessment within, and in the vicinity of, the proposed development. Where other mitigation is required to reduce or eliminate a significant effect, this is referred to as secondary mitigation. Secondary mitigation measures have not been incorporated into the design of the proposed development and would therefore not appear on any development plans.

9.8.3 This section also describes any required monitoring regimes, including monitoring of specific receptors/resources, or monitoring the effectiveness

of a mitigation measure. The requirements, scope, frequency and duration of a given monitoring regime are also set out, as far as possible.

b) Mitigation (and enhancement)

9.8.4 For the purpose of this assessment, mitigation measures have been proposed where there is an adverse impact of greater than minor significance and the impact magnitude, spatial scope, and temporal nature make it appropriate to do so.

9.8.5 Across the socio-economic assessment, SZC Co. has adopted a best practice precautionary approach to ensure that all evidenced impacts described in this assessment would be addressed through mitigation where practicable and that a monitoring system would be in place to address the sensitivities described in the impact assessments. The relevant strategies for mitigation and monitoring are listed and cross referenced below along with their key points. Where possible, enhancements have been identified which could bring additional benefits to the area.

9.8.6 Relevant mitigation and enhancement measures are listed and cross referenced below. These mitigation and enhancement measures would be implemented during the construction phase of the Sizewell C Project.

i. Employment, skills and education effects

9.8.7 The economic effects of the Sizewell C Project on skills, employment, and labour market and supply chain are substantial and beneficial in terms of the creation of new jobs, effects on unemployment and economic inactivity, generation of business activity in the supply chain, and indirect and induced benefits of earnings and spending of workers.

9.8.8 SZC Co. has set out the overall economic benefits of the Sizewell C Project in the **Economic Statement** (Doc Ref. 8.9), which includes measures to enhance the benefits of the Project, which are embedded into the assessment of significance (see **Section 9.6**).

9.8.9 As the proposed development results in beneficial effects on skills, employment, labour market, and supply chain, these effects do not require additional mitigation.

ii. Tourism

Tourism Fund

9.8.10 SZC Co. recognises that there may be potential for the tourist economy to be adversely affected as a result of the Sizewell C Project, in some locations and under some conditions.

9.8.11 SZC Co. recognises that there is inherent uncertainty in whether and where such adverse effects may occur. SZC Co. also recognises that there is an opportunity to tackle perceived changes to certain sensitivities that existing and potential visitors to the area may be concerned about, and to ensure that the residual effect of the Sizewell C Project on tourism is not negative, and is potentially positive.

9.8.12 As such, SZC Co. will make available a Tourism Fund to develop mitigation measures to reduce this risk and promote the area in order to reduce the risk of perceived changes in visitor behaviour from materialising. This Tourism Fund, along with its the governance, scale, and application, will be secured by the Section 106 Agreement (see **draft Section 106 Heads of Terms**). This Tourism Fund could be used to deliver initiatives such as:

- Development of or support for a tourism strategy/action plan.
- Marketing and promotion activities for the Suffolk coast and specific attractions and events within it, which can demonstrate a strong return on investment.
- Supporting local projects including capital and revenue investment.
- Undertaking future visitor surveys.
- Providing information about public transport and travel.
- Supporting existing tourist information centres.
- Responding to effects on particularly sensitive attractions/locations within the AONB.

iii. Agricultural economy

9.8.13 On completion of the construction phase, the land outside of the permanent development site would be restored to agricultural use and ecological habitat creation.

9.8.14 As the proposed development results in negligible effects on the local agricultural economy, these effects do not require additional mitigation.

iv. Accommodation

9.8.15 Although the construction phase assessments predict a negligible or minor adverse effect on the accommodation market at the wider scale, there are

predicted to be localised effects, which would be of major adverse significance and therefore require additional mitigation.

9.8.16 As such, mitigation has been proposed as part of an **Accommodation Strategy** (Doc Ref. 8.10) submitted with the application and summarised below.

9.8.17 The **Accommodation Strategy** (Doc Ref. 8.10) contains measures to specifically target hard to reach and vulnerable groups that may experience difficulties accessing or retaining housing as a result of the Sizewell C Project's effects on the lower end of the PRS – see **Accommodation Strategy** (Doc Ref. 8.10), and Housing Fund (secured through the Section 106 Agreement).

Housing Fund

9.8.18 SZC Co. is proposing additional support for housing in the local area by establishing a Housing Fund, linked to the **Accommodation Strategy** (Doc Ref 8.10).The Housing Fund would be informed by the scale of the workforce, likely accommodation sector demand, and existing supply and characteristics of the local housing market.

9.8.19 This support will particularly focus on the PRS, and the lower end of that sector where there is the greatest potential for workers to seek the same type of accommodation that local residents with housing need rely on.

9.8.20 The Housing Fund would be capable of delivering additional capacity and providing resilience in the build up to peak demand and during the peak, and may have the potential to leave a lasting legacy in terms of improvements to the existing housing stock.

9.8.21 The Housing Fund would provide financial support to a range of initiatives which would help to:

- Develop supply through a range of measures including:
  - supporting rent/deposit guarantee schemes – interventions to make the market work better, and support rent deposits for people at risk of homelessness;
  - providing equity loans to residents to enable them to secure suitable accommodation and free up homes/rooms in the PRS;
  - providing equity loans to residents in the social rented sector to help them access owner-occupied and rented property and rationalise the supply and occupancy of social rented homes as a result;

  - supporting empty homes back into use;
  - providing loans/grants/guaranteed lets, e.g. renovation grants;
  - helping to deliver the East Suffolk Housing Strategy (2017) (Ref 9.17) pledge to work with housing associations to explore opportunities for mixed schemes of private sale and affordable housing to generate profits to replace grant funding; and
  - tackling under-occupation.

- Provide funding for resilience – to support and provide resilience to services, staffing, advice and short-term response such as temporary accommodation and the use of bed and breakfast accommodation.

- Support growth in the tourist accommodation sector through support with planning, licensing and development, and funding for increases in capacity or re-design of sites.

9.8.22 This Housing Fund, along with its the governance, scale, and application, will be secured by the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

Accommodation management system

9.8.23 In order to help manage the distribution of workers and avoid or reduce potential adverse effects on accommodation capacity in local areas in a responsive way, SZC Co. would work with partners to develop mechanisms that:

- allow local landlords, tourism businesses and residents to register accommodation available for workers; and

- enable SZC Co. and its contractors to signpost workers towards this accommodation and provide information to accommodation providers.

9.8.24 The implementation of the accommodation management system will be secured through the Section 106 Agreement (see **draft Section 106 Heads of Terms**) and will include the following components:

- Monitoring of the workforce (see part (c) of this section), contractors and local housing market (see information management and database/portal below).

- Provision of information to workers, contractors and accommodation providers, and working with providers to help them understand opportunities to support the Sizewell C Project's workforce.

Information management and database/portal

9.8.25 SZC Co. would collect, manage, and hold information about the local accommodation market (including registrations from providers with accommodation) that can be used to provide contractors and workers with a means of finding the most suitable accommodation and location.

9.8.26 In addition, information would be provided to prospective or existing landlords that could help ensure they are providing accommodation that meets safety and quality standards. This would help to avoid the risk of landlords being unaware of rules and regulations that apply to letting property, or new providers entering the market with accommodation of an unacceptably low standard.

9.8.27 The Accommodation Management System would serve to raise understanding of applicable regulations, and sources of further information for prospective accommodation providers.

9.8.28 SZC Co. will run a series of 'one-stop-shop' open events for providers of tourist accommodation and particularly caravan sites close to the Sizewell C Project, along with ESC, in order to:

- Inform them of the likely scale of demand from workers, how this changes over time, and the likely accommodation requirements and characteristics of the workforce.
- Set out expected safety and quality standards, as well as planning and licensing that may be required to provide accommodation to workers, for example amendments of residency criteria for caravan sites.
- Respond to any concerns that accommodation providers may have about NHB construction workers, including how the Sizewell C Project uses the Worker Code of Conduct to enforce high standards of behaviour both on and off-site.
- Explain what providers can/cannot expect from the Sizewell C Project based on lessons learnt from Hinkley Point C, e.g. the Sizewell C Project will not reimburse unpaid rent and – due to the large number of people on-site – can only enforce the Worker Code of Conduct if accommodation providers collect a full name/contractor name from tenants.

9.8.29 Through a 'look-ahead' with contractors and SZC Co.'s workforce delivery team, spikes in worker demand may be mitigated through a proactive approach to identifying suitable accommodation.

9.8.30 The Sizewell C Project would also be able to provide information about the key activities of the construction phase, facilities and build-up of the workforce back to the market, which would help providers understand more about the likely demand and plan for it. This may include location of project infrastructure such as park and ride sites, and pick-up points for buses for example.

9.8.31 It is anticipated that the measures funded by the Housing Fund and implemented as part of the accommodation management strategy would result in residual effects reducing to **not significant** (negligible to minor adverse) at all scales.

v. Public services and community facilities

Education

9.8.32 The assessment considers that effects on physical provision of educational facilities are negligible at the 60-minute, district and county scales, although there are uncertainties around the likely location of the workforce, and available school capacity in the future which could create minor adverse effects in localised areas.

9.8.33 SZC Co. would employ workforce monitoring and surveys as part of the mitigation of effects on accommodation. This monitoring would provide information to estimate the number and locations of workers who bring dependent children to the area temporarily. SZC Co. would provide this information to SCC and, with them, identify potential effects on education capacity.

9.8.34 Periodically, if a potential effect was identified through the information, SCC would be able to draw down on a Public Services Contingency Fund to expand provision in locations with limited capacity where the net additional effect of the workforce exceeds capacity. The establishment of this Public Services Contingency Fund will be secured through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

9.8.35 Should the need arise, the public services contingency fund could also contribute to funding a support teacher or member of staff who could co-ordinate any additional activities required to integrate children into the local school system.

9.8.36 This would ensure that residual effects are negligible at all spatial levels.

Social care

9.8.37 SZC Co. is aware of the risks that the Sizewell C Project may pose to the delivery of social services. The Sizewell C Project's implementation plans, secured through obligations in the Section 106 Agreement (see **draft Section 106 Heads of Terms**), have been developed to limit potential effects on the delivery of social care.

9.8.38 **Section 9.6** sets out embedded (primary) and tertiary measures that contribute towards reducing risks associated with the provision of social care services.

9.8.39 Overall, the following additional mitigation activities would indirectly contribute to reducing the risk of adverse significant effects on social care and the beneficiaries of the service:

- Specifically targeting hard to reach and vulnerable groups that may experience difficulties accessing or retaining housing as a result of the Sizewell C Project's effects on the lower end of the PRS – see **Accommodation Strategy** and Housing Fund (Doc Ref. 8.10).

- Working bilaterally with those organisations closest to the Sizewell C Project that raise safeguarding concerns to identify practical and effective solutions, as set out in the **Community Safety Management Plan** (Doc Ref. 8.16).

- Providing community information to workers and contractors, and workforce information to communities, community groups and accommodation providers in order to promote integration and awareness of the Sizewell C Project and its effects, and the characteristics of the communities in the local area. This information would be provided through mechanisms secured in the **Accommodation Management System** which would be implemented in addition to the tertiary mitigation communication measures set out in the **CoCP** (see **Section 9.6**) (Doc Ref. 8.11).

- Managing workforce accommodation through the **Accommodation Management System.** The implementation of the Accommodation Management System would be secured through an obligation in the Section 106 Agreement (see **Section 106 Head of Terms**).

9.8.40 SZC Co. acknowledges the risks that the Sizewell C Project may pose to the delivery of social services as identified by stakeholders and has therefore proposed a Public Services Contingency Fund to be secured through the Section 106 Agreement to mitigate potential effects, and

respond to effects related to the Sizewell C Project as they arise. The establishment of this Public Services Contingency Fund will be secured through an obligation in the Section 106 Agreement (See **draft Section 106 Heads of Terms**).

9.8.41 The proposed mitigation would ensure that the residual effects of the Sizewell C Project on social services would be negligible at all scales.

Recreation, sport and leisure

9.8.42 The impact on demand for additional formal sport and leisure service provision is likely to be limited due to the demographic characteristics of the workforce, its temporary nature, its relatively short peak effects, and its propensity to use existing facilities based on demographics and market segmentation.

9.8.43 Any adverse effects would be avoided by primary mitigation, including the sports and leisure provision at Leiston set out at **Section 9.6.**

Regulatory and environmental services

9.8.44 Impacts on regulatory and environmental services are identified as negligible at the district level, with the potential to be minor adverse at the local (ward) level.

9.8.45 The proposed approach to mitigating accommodation impacts described above would mitigate the impact on the main regulatory service functions. The residual effects would therefore be negligible at the district and local levels.

Emergency services

9.8.46 SZC Co. has been working with service providers (including district and county councils, Suffolk Constabulary, Suffolk Fire and Rescue Service, and East of England Ambulance Service, as discussed in **Volume 2, Chapter 28** of the **ES**, Health and Wellbeing) to address any potential community safety impacts arising from the Sizewell C Project.

9.8.47 Effects identified range from negligible or minor adverse at regional scales to moderate adverse at some more local scales across emergency response for fire and rescue, policing and ambulance services.

9.8.48 The assessment sets out that while wider effects may be not significant, engagement with service providers has identified that there may be local factors and service-specific factors that contribute to disproportionate demand which will need to be mitigated through financial contributions secured by the Section 106 Agreement.

9.8.49 Additionally, SZC Co. recognises that in some cases, incidents that may arise may draw on more than one emergency service resource, and that some incidents may be more likely to occur than others due to the demographic factors of the workforce. The implication of these incidents have been considered in the **Community Safety Management Plan** (Doc Ref 8.16), and SZC Co. is working with Suffolk Constabulary to consider all aspects of potential additional demand for resources in order to develop appropriate mitigation via financial contributions secured by the Section 106 Agreement.

Policing services and community safety

9.8.50 The assessment considers that while potential effects on crime levels would be negligible at the Suffolk Constabulary service level, there may be some moderate adverse effects in local wards as a result of the concentration of NHB workers in some areas.

9.8.51 A **Community Safety Management Plan** (Doc Ref. 8.16) has been produced which sets out the overarching approach to ensuring that community safety and emergency services issues are comprehensively addressed, and governance and monitoring arrangements are in place to deal with any particular sensitivities should they arise. This should enable the service providers responsible for community safety to continue to provide existing services without disadvantage to the community caused by the Sizewell C Project.

9.8.52 Where necessary, SZC Co. will address effects on the provision of emergency services through financial contributions towards additional resourcing relevant to the identified net additional level of effect, secured through the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

9.8.53 As a result of the proposed additional mitigation, the residual effects of the Sizewell C Project on policing services and community safety would be negligible at the Suffolk Constabulary scale, and at local (ward) scales.

Fire and rescue services

9.8.54 Impacts on fire and rescue services are likely to be negligible at the Suffolk Fire and Rescue Service level, but there is a risk they could be minor adverse at the local level subject to the types of incidents.

9.8.55 Mitigation is set out in the **Community Safety Management Plan** (Doc Ref. 8.16), and the **Accommodation Strategy** (Doc Ref. 8.10).

9.8.56 Where necessary, SZC Co. will address effects on the provision of emergency services through financial contributions towards additional

resourcing relevant to the identified net additional level of effect, secured through the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

9.8.57 As a result of the proposed additional mitigation, the residual effects of the Sizewell C Project on fire and rescue services and community safety would be negligible at the Suffolk Fire and Rescue Service scale, and at local (ward) scales.

vi. Community cohesion and integration

9.8.58 The Sizewell C Project is likely to lead to significant effects on population and demographics on a temporary basis in Leiston. Perceived changes to community cohesion and integration may arise during this time and SZC Co. has set out measures by which this will be managed.

9.8.59 This would partly be addressed through the mitigation measures for economy and skills, accommodation and public services described elsewhere in this section but SZC Co. also proposes a number of actions to avoid/limit any negative impacts and to mitigate impacts locally.

9.8.60 SZC Co. would work with public service providers and individual facilities (such as schools) to provide them with up-to-date information about the construction workforce, as discussed in section 9.8(i) of this chapter, and management plans to ensure services are aware of potential demand in advance.

9.8.61 SZC Co. are aware of potential effects of the construction workforce on vulnerability to homelessness – proposed mitigation measures are set out in this chapter and in the **Accommodation Strategy** (Doc Ref. 8.9) including measures to ensure that workers are able to access secure and adequate quality accommodation.

Community Safety Management Plan

9.8.62 SZC Co. has developed a **Community Safety Management Plan** (Doc Ref. 8.16) in collaboration with local authorities, emergency services and public services, among other stakeholder groups. It outlines the approach to community safety in the area. It also sets out a range of measures that will contribute to both worker and community safety and health and wellbeing on the Sizewell C Project. Where appropriate, implementation of the measures set out in the **Community Safety Management Plan** will be secured through obligations in the Section 106 Agreement (see **draft Section 106 Heads of Terms**, provided as **Appendix J** to the **Planning Statement** (Doc Ref. 8.4)) or via the **Code of Construction Practice (CoCP)** (Doc Ref. 8.11) (which will itself be secured by requirement).

Additional mitigation measures set out in the **Community Safety Management Plan** include:

- a precautionary approach to manage impacts on community safety, cohesion and public services, with a focus on prevention where possible and measures to raise awareness of the Sizewell C Project's changes/risks to community safety;

- information for accommodation providers in the PRS and tourism sectors, setting out details of the workforce profile and the Worker Code of Conduct (see the **Accommodation Management System** and approach to mitigating accommodation impacts described above);

9.8.63 These would be in addition to the relevant primary and tertiary mitigation set out in **section 9.6** which include:

- a mechanism for the local community to register public concerns, through (for example) a hotline (secured through the **CoCP** (Doc Ref. 8.11));

- provision of occupational health services to reduce pressure on existing facilities and a review of any residual public health care requirements from NHB workers and their families; and

- provision of project-recreational facilities, including off-site sports facilities, helping to manage the demand from workers.

Property (accommodation campus and caravan site)

9.8.64 SZC Co. would ensure the active management of its on-site accommodation. This would include enforcement of expected standards of behaviour from workers, hours of operation, security issues, liaison with emergency services and complaints procedures for local residents. These measures would be included in the **Worker Code of Conduct** (see **Section 9.6**).

Community Fund

9.8.65 SZC Co. recognises that there would be intangible residual in-combination effects on local communities as a result of combined environmental effects, both perceived and real. In some instances, these cannot be directly mitigated through physical design measures, and require a more reactive approach.

9.8.66 As a result, SZC Co. would offer a Community Fund to be administered on behalf of the community to help mitigate these effects through schemes, measures and projects which promote the economic, social or environmental well-being of those communities and enhance their quality of life. The provision of the Community Fund will be secured through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

9.8.67 The Community Fund may include:

- an ongoing programme of small grants to charities, voluntary groups and social enterprises – awarded for projects, measures or initiatives that help to mitigate impacts felt in the community from the construction of the Sizewell C Project; and
- strategic grants – for example for investment in local facilities or services to enhance the positive and reduce or avoid potential negative impacts on communities.

9.8.68 In general, activities receiving grants should aim to improve the social, economic or environmental wellbeing of the communities affected by the development and be relevant to the Sizewell C Project's effects, either by reducing or removing impacts or by helping the community to take advantage of opportunities presented by the Sizewell C Project.

9.8.69 The Community Fund will recognise that some communities closer to the main development site are likely to experience more and greater effects across a wider range of social, economic and environmental areas.

vii. Inter-relationship effects

9.8.70 As set out above (**part vi** of this section), the Community Fund would seek to mitigate intangible residual in-combination environmental effects on local communities (socio-economic receptors) as a result of combined environmental effects, both perceived and real.

c) Monitoring

9.8.71 This chapter sets out likely significant effects based on the best current knowledge and assumptions about the scale and nature of the Sizewell C Project's construction workforce, the supply of accommodation, and the likely spatial distribution of the workforce.

9.8.72 The spatial distribution of the workforce is itself based on a Gravity Model that has been reviewed by stakeholders.

9.8.73 However, SZC Co. acknowledges that, as with any assumptions, there is some uncertainty and the reality could be different.

9.8.74 SZC Co. has therefore taken a precautionary approach to the assessment of effects and has planned its mitigation based on the peak of construction. It is applying mitigation strategies that are comprehensive in scale and implementation strategies that are flexible and responsive to local variations, related to uncertainty, where they may occur. This is an important element in the adaptive approach to mitigating effects for this major project.

9.8.75 Any differences from the assessed case may or may not lead to different impacts which may or may not require different or additional mitigation. A difference in the size or distribution of the workforce alone may not lead to different impacts. For example, the assessment of accommodation impacts is based on assumptions about the supply of accommodation. If the workforce were more spatially concentrated, and the local accommodation market responded by making more accommodation available, the actual impacts may be largely similar or identical to the assessed impacts.

9.8.76 It is therefore necessary to monitor both the inputs (i.e. the scale, nature and distribution of the workforce), and also the outputs (the effects of the workforce on accommodation markets or public services).

9.8.77 SZC Co. recognises that effects and mitigation set out in this chapter have the potential to be influenced by factors beyond SZC Co.'s control including political, legislative and policy change, economic change and local factors.

9.8.78 In order to plan for this uncertainty, and to help the local authorities manage mitigation effectively, SZC Co. and contractors will work together to develop an effective approach to monitoring of the workforce that will help to inform how mitigation can be best directed to areas, sectors and services that would address any issues as they arise.

i. Workforce monitoring and surveys

9.8.79 Information on the location and type of accommodation being used by workers will be collected throughout the construction period through regular workforce surveys. This will be benchmarked to an overall database that will record any worker who is employed on the Sizewell C Project, and who travels to site. The workforce profile includes all workers who work at the site for five days in any calendar month, or four consecutive days, and therefore captures people likely to seek temporary accommodation in the local area on a medium-to-long-term basis.

9.8.80 The monitoring and workforce survey system will be implemented based on the following principles:

- That workers will be inducted on to the Sizewell C Project and given a unique reference number and site access card that will be used to track their progress on a single database. This will inform SZC Co. of how many people are working on the Sizewell C Project, and how many people travel to site, and how regularly.

- Workers will periodically need to re-induct on the Sizewell C Project, but will retain their unique reference number.

- Regular workforce surveys will be undertaken, fixed to a statistically significant sample size, and with consistent survey questions that can provide longitudinal data.

- Workforce surveys will return information relating to:

  - Whether the workforce is HB or NHB – by asking about the permanent place of residence of if workers do not move to the area for work (i.e. HB workers), and the temporary place of residence if workers do move to the area for work (i.e. NHB workers).

  - The skill/role of the employee.

  - Demographic and housing characteristics of the worker relevant to the assessment, including their age, gender, the type of temporary accommodation they are staying in, and whether they have brought with them any dependent children or adults.

9.8.81 This data will be collected in a single database and reviewed every six months in order to track the scale and potential effects of the workforce to inform the delivery of mitigation measures as set out in this assessment.

9.8.82 SZC Co. will undertake monitoring of the workforce and will use reasonable endeavours to obtain the necessary information from workers and contractors. The implementation of this monitoring will be secured through a Section 106 Agreement (see **draft Section 106 Heads of Terms**).

ii. Monitoring of effects

9.8.83 In some instances, the monitoring of potential effects of the construction workforce is needed to identify where and which mitigation measures need to be enacted. SZC Co. will continue to agree relevant indicators of effects with local authorities responsible for services that may be affected. From time to time, East Suffolk Council and SZC Co. will propose relevant indicators to a Socio-Economic Advisory Group for its approval. The establishment of the Socio-Economic Advisory Group will be secured

through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

Accommodation effects

9.8.84 Local authorities are required to provide a substantial amount of monitoring data to central government in order to monitor the level of service demand, for example in the form returns that monitor demand for services related to housing need, and effectiveness of homelessness prevention services.

9.8.85 SZC Co. and ESC recognise the value of utilising this information as supporting evidence to demonstrate effects. Further details are set out in the **Accommodation Strategy** (Doc Ref. 8.10).

Community safety and community cohesion effects

9.8.86 SZC Co.'s communication, community and stakeholder engagement strategy sets out measures for the community to report incidents and liaise with the Sizewell C Project about concerns with regards to community safety, cohesion and integration as a result of the construction workforce. The strategy also includes measure for the provision of information and is set out in the **Code of Construction Practice** (Doc Ref. 8.11).

9.8.87 Feedback would also be gained via the Community Safety Working Group, further details of which are set out in the **Community Safety Management Plan** (Doc. Ref. 8.16). The establishment of the Community Safety Working Group, will be secured through an obligation in the Section 106 Agreement (see **draft Section 106 Heads of Terms**).

9.8.88 This information would allow SZC Co. to enact the measures set out within its implementation plans, most importantly the measures set out in the **Community Safety Management Plan** (Doc Ref. 8.16), and inform public service providers with responsibilities for community safety of the location and nature of effects.

Supply chain and employment and skills effects

9.8.89 SZC Co. supply chain team will seek to collect data on businesses supplying the Sizewell C Project, most likely utilising a socio-economic reporting tool similar to the one already in use at Hinkley Point C. This will enable reporting of international, UK, and local/regional content and spend, for the purposes of reporting to government and other stakeholders as required.

9.8.90 Tier 1 and Tier 2 suppliers will be encouraged to participate in gathering information which will be used compare and contrast local and regional levels of engagement.

9.8.91 There would also be ongoing review of the effectiveness of the measures set out in the **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9) and the **Supply Chain Strategy** provided in **Appendix B** of the **Economic Statement** (Doc Ref. 8.9), including key performance indicators.

iii. Governance

9.8.92 By monitoring workforce patterns, and through ongoing stakeholder engagement, potential effects arising (on housing, public services or community safety) will be identified.

9.8.93 SZC Co. will work with local authorities and contractors to regularly review and report on monitoring and survey information collected, against the changing background of policy, economic and legislative change that may arise during the Sizewell C Project, and collaboratively decide on how best to release, distribute and track mitigation in order for it to have sufficient time to be implemented, and to make sure it is directed to the areas it is needed most.

9.8.94 This reporting would be undertaken by a socio-economic advisory group, the terms of reference of which would be secured through the Section 106 Agreement (see **draft Section 106 Heads of Terms)**.

9.9 Residual effects

9.9.1 **Table 9.52** presents a summary of the socio-economic assessment. It identifies the receptor/s likely to be impacted, the level of effect and, where the effect is deemed to be significant, the table includes the mitigation proposed and the resulting residual effect.

9.9.2 It should be noted that not all such effects would be adverse and some would be beneficial.

Table 9.52: Summary of effects for the socio-economic assessment

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
Economic Effects – Construction					
Labour market.	Home-based recruitment.	Enhancement through **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9).	Moderate Beneficial **(Significant)** at 90-minute (CDCZ) scale.	None	Moderate Beneficial **(Significant)** at CDCZ.
Labour market (workless i.e. unemployed or economically inactive).	Effects on unemployment and economic inactivity.	Enhancement through **Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9).	Moderate/Major Beneficial **(Significant)** at CDCZ scale.	None	Moderate/Major Beneficial **(Significant)** at CDCZ scale.
Labour market (Employed).	Effects on labour market churn and 'displacement'.	**Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement** (Doc Ref. 8.9).	Negligible **(Not Significant)** at CDCZ scale.	None	Negligible **(Not Significant)** at CDCZ scale.
Local/regional	Business and supply chain.	**Supply Chain**	Moderate Beneficial **(Significant)**	None	Moderate Beneficial

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
economy.		**Strategy** provided as Appendix B of the **Economic Statement** (Doc Ref. 8.9).	at local and regional scale.		**(Significant)** at local and regional scale.
Local/regional economy.	Wages/spending and additionality.	None	Moderate Beneficial **(Significant)** at local and regional scale.	None	Moderate Beneficial **(Significant)** at local and regional scale.
Local/regional economy.	Effects on tourism economy.	None	Potential for Minor to Moderate Adverse **(Potentially Significant)** effect at the local (Suffolk coast) scale[11].	Tourism Fund.	Negligible **(Not Significant)** at the local (Suffolk coast) scale
Local/regional economy.	Effects on agricultural economy.	None	Negligible **(Not Significant)** at Suffolk (county) scale.	None	Negligible **(Not Significant)** at Suffolk (county) scale.
Local/regional economy.	Effects of transport on business.	None	Negligible **(Not Significant)** at Suffolk (county) scale.	None	Negligible **(Not Significant)** at Suffolk (county) scale.
Accommodation Effects - Construction					
Tourist accommodation sector.	Effects on capacity and operation of the tourist accommodation sector.	Accommodation Campus and Caravan Site.	Minor Beneficial **(Significant)** at 60-minute area scale. Minor to Major Adverse **(Significant)** at local scale (wards).	Housing Fund. Accommodation Management System.	Minor Beneficial **(Not Significant)** at 60-minute area scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).
Private rented	Effects on capacity and	Accommodation	Negligible **(Not Significant)** at 60-	Housing Fund.	Negligible **(Not Significant)** at

[11] SZC Co. recognises that there is inherent uncertainty about the extent to which this may occur, and there is an opportunity to tackle perceived changes to certain sensitivities that existing and potential visitors to the area may be concerned about

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
accommodation sector.	operation of the private rented accommodation sector.	Campus and Caravan Site.	minute area scale. Minor to Major Adverse **(Significant)** at local scale (wards).	Accommodation Management System.	60-minute area scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).
Owner occupied accommodation sector.	Effects on capacity and operation of the owner-occupied accommodation sector.	Accommodation Campus and Caravan Site.	Negligible **(Not Significant)** at 60-minute area scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).	None	Negligible **(Not Significant)** at 60-minute area scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).
Population Dynamics – Construction					
Population	Population change and dynamics.	None	Negligible or Minor **(Not Significant)** at 60-minute area scale. Moderate to Major **(Significant)** at local scale (wards).	None	Negligible or Minor **(Not Significant)** at 60-minute area scale. Moderate to Major **(Significant)** at local scale (wards).
Public Services Effects – Construction					
Pre-school provision and childcare services.	Effects on demand for childcare against existing capacity.	None	Negligible **(Not Significant)** at District and County scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at District and County scale. Negligible **(Not Significant)** at local scale (wards).
Primary school capacity.	Effects on demand for primary education against existing capacity.	None	Negligible **(Not Significant)** at 60-minute area, District and County scale. Negligible to Minor/Moderate Adverse **(Not Significant)** at local scale (wards).	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at 60-minute area, District and County scale. Negligible **(Not Significant)** at local scale (wards).

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
Secondary school capacity.	Effects on demand for secondary education against existing capacity.	None	Negligible **(Not Significant)** at 60-minute area, District and County scale. Negligible to Minor Adverse **(Not Significant)** at local scale (wards).	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at 60-minute area, District and County scale. Negligible **(Not Significant)** at local scale (wards).
Social Services provision / capacity.	Effect on provision of social services (Demand from workers' families).	None	Negligible **(Not Significant)** at 60-minute area and County scale.	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at 60-minute area and County scale.
Social Services provision / capacity.	Effect on provision of social services (Construction workforce).	**Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement**. Occupational Healthcare Service.	Negligible **(Not Significant)** at County scale. Minor Adverse **(Not Significant)** at local scale (wards).	Welcome Packs. Housing Fund. Community Fund. Additional measures set out in the Community Safety Management Plan Public services contingency fund.	Negligible **(Not Significant)** at County scale. Minor Adverse **(Not Significant)** at local scale (wards).
County Council-run services.	Effects on demand for / capacity of other county-level services.	None	Negligible **(Not Significant)** at County scale.	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at County scale.
Provision and capacity of formal sports facilities.	Demand for formal sports and leisure facilities from construction workforce.	On-site recreation and leisure facilities within Accommodation Campus.	Major Beneficial **(Significant)** at all scales.	None.	Major Beneficial **(Significant)** at all scales.

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
		Off-site recreation and leisure facilities in Leiston (3G pitch and MUGA).			
District Council services (waste, cleaning, environmental and public health).	Effect of the construction workforce on demand for regulatory and environmental services.	Sizewell C Waste Management Strategy.	Negligible **(Not Significant)** at District scale.	None (though may draw on public services contingency fund).	Negligible **(Not Significant)** at District scale.
Policing services and community safety.	Effect of the construction workforce on crime and policing.	Accommodation Campus and Caravan Site.	Negligible **(Not significant)** at Suffolk Constabulary scale. Moderate Adverse **(Significant)** at local (ward) scale.	Additional measures set out in the Community Safety Management Plan Financial compensation.	Negligible **(Not significant)** at Suffolk Constabulary scale.
Fire and rescue services.	Effect of the construction workforce on provision of fire and rescue services.	Accommodation Campus and Caravan Site. Trasport Incident Management Plan.	Negligible **(Not significant)** at Suffolk Fire and Rescue Service scale. Minor Adverse **(Not Significant)** at local (ward) scale.	Additional measures set out in the Community Safety Management Plan Accommodation Management System. Financial compensation.	Negligible **(Not significant)** at Suffolk Fire and Rescue Service scale.
Community cohesion / integration.	Effect of the construction workforce community cohesion and integration.	Various – See Table 9.49.	Minor Adverse **(Not Significant)** at all scales.	Various – See Table 9.49.	Negligible or Minor Adverse **(Not Significant)** at all scales.
Inter-relationship Effects – Construction					
Communities,	Effect of socio-economic	Various inherently	Negligible	Community Fund	Negligible

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
community facilities and homes	effects combined with other environmental e.g. transport effects	cross-aspect – see Section 9.7 (d) (vi)			
Operational Effects					
Labour Market.	Effect on local direct employment.	**Employment, Skills and Education Strategy** provided in **Appendix A** of the **Economic Statement**	Moderate Beneficial **(Significant)** at County scale.	None	Moderate Beneficial **(Significant)** at County scale.
Labour Market.	Effect on local indirect employment / economic effects.	None	Moderate Beneficial **(Significant)** at County scale.	None	Moderate Beneficial **(Significant)** at County scale.
Local / regional economy.	Effect on business and supply chain through procurement of goods and services.	None	Moderate Beneficial **(Significant)** at Regional scale.	None	Moderate Beneficial **(Significant)** at Regional scale.
Private rented accommodation sector.	Effects on capacity and operation of the private rented accommodation sector.	None	Negligible **(Not Significant)** at all scales.	None	Negligible **(Not Significant)** at all scales.
Owner occupied accommodation sector.	Effects on capacity and operation of the owner-occupied accommodation sector.	None	Negligible **(Not Significant)** at all scales.	None	Negligible **(Not Significant)** at all scales.
Public services.	Effects on net additional demand for public services.	None	Negligible **(Not Significant)** at all scales.	None	Negligible **(Not Significant)** at all scales.

Receptor	Impact	Primary or Tertiary Mitigation	Assessment of Effects	Additional Mitigation	Residual Effects
Community cohesion / integration.	Effects on population change, community cohesion and integration.	None	Negligible **(Not Significant)** at all scales.	None	Negligible **(Not Significant)** at all scales.
Inter-relationship Effects – Operation					
Communities, community facilities and homes	No impact	None	Negligible	None	Negligible

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