



Galileo 03 Ltd.

Mynydd Ty-talwyn Energy Park - Environmental Statement Volume II

Main Written Statement – Chapter 13: Population

Project Reference: 663870

This chapter is summarised within the Non-Technical Summary in Volume I of this Environmental Statement. A Welsh translation of the Non-Technical Summary is also available as part of the application.

Crynoir y bennod hon yng Nghrynodeb Annhechnegol y Datganiad Amgylcheddol hwn. Mae cyfieithiad Cymraeg o'r Crynodeb Annhechnegol hefyd ar gael fel rhan o'r cais

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This work has been undertaken in accordance with the quality management system of RSK Environment Ltd.

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13 POPULATION

13.1 Introduction

- 13.1.1 This chapter presents an assessment of likely significant effects arising from the construction, operation and decommissioning of the Proposed Development upon population in the local area and Wales.
- 13.1.2 This chapter is supported by the following appendices presented in the **Environmental Statement (ES) Volume III**:
- **Appendix 13.1: Outline Access Management Plan.**
- 13.1.3 This chapter is supported by the following figures presented in **ES Volume IV**:
- **Figure 13.1: Public Rights of Way.**
- 13.1.4 This chapter should be read in conjunction with the following chapter in **ES Volume II**:
- **Chapter 8: Landscape and Visual.**

13.2 Consultation and Scope

Scoping Direction

- 13.2.1 The scope of this assessment has been established through an ongoing scoping process. This has involved the production of an EIA Scoping Report (provided in **ES Volume III, Appendix 1.1: EIA Scoping Report**), which was submitted to Planning and Environment Division Wales (PEDW) on 27 November 2023. Further information on the scoping process can be found in **ES Volume II, Chapter 4: Approach to the EIA**.
- 13.2.2 The Scoping Direction, a copy of which is included in **ES Volume III, Appendix 1.2: Scoping Direction**, was received on 11 April 2024. **Table 13.1** summarises the key Scoping Direction comments related to this assessment and sets out how these have been addressed.

Table 13.1 Summary of Scoping Direction comments Relevant to this Population Assessment

ID no.	Issue	Comment Raised	Applicant Response
5.9	Population and human health-Socio-economics	Comments received from Bridgend County Borough Council (BCBC) and Neath Port Talbot Council (NPTC) stated that due to the scale of the Proposed Development, project specific socio-economic elements must be considered. Therefore, PEDW advised that project specific information should be included in the assessment and for socio-economic impacts to be scoped in to the ES in a proportionate manner.	Potential socio-economic impacts have been scoped into the assessment.
5.9	Population and human health-Land use and public access	The EIA Scoping Report referenced the potential for temporary or permanent diversions of Public Rights of Way (PRoW) as a result of the Proposed Development. Therefore, PEDW directed that impacts to public access should be considered fully in the ES.	Potential impacts to public access have been scoped into the assessment and an Outline Access Management Plan is provided at ES Volume III, Appendix 13.1: Outline Access Management Plan .
5.10	Population and human health-Human health	PEDW agreed with the approach to human health as outlined in the EIA Scoping Report, whereby human health is scoped into the ES but not as a standalone chapter. NPTC also recommended that Public Health Wales should be consulted and their views used to inform human health matters.	Human health matters have been addressed in the following ES documents: • ES Volume II, Chapter 8: Landscape and Visual; • ES Volume II, Chapter 9: Noise and Vibration; • ES Volume II, Chapter 12: Traffic and Movement; and • ES Volume III, Appendix 4.3: Air Quality Assessment.

ID no.	Issue	Comment Raised	Applicant Response
			Whilst Public Health Wales was not consulted directly, the Proposed Development is in accordance with Public Health Wales strategies, particularly through the contribution towards the development of renewable energy infrastructure which assists in addressing potential health impacts associated with climate change.

Additional Consultation

- 13.2.3 No additional consultation has been undertaken in support of the preparation of this assessment outside of the EIA Scoping process.

Statutory Pre-application Consultation (PAC)

- 13.2.4 **Table 13.2** provides a summary of the responses received, in relation to population, following the statutory PAC process, and the necessary action taken to update the assessment, where relevant. Where appropriate, the PAC responses have been summarised. The full consultee comments are set out in the standalone **Pre-application Consultation Report**, which is submitted as part of the DNS Application.

Table 13.2 PAC Comments and Responses

Consultee	Summary of Consultee Comments	Applicant Response
BCBC	The Rights of Way team noted that the public rights of way across the Site have clearly been considered throughout the development process and acknowledge the meetings held between the Applicant and the Rights of Way team. BCBC confirm that the Proposed Development will not require the permanent diversion of any of the on-site routes. BCBC note that a financial contribution via a s.106 Agreement for enhancements to the rights of way network across the Site is proposed, as is a detailed Access Management Plan via condition. With these measures in place the Rights of Way team confirm that they would have no objection to the Proposed Development.	As further detailed in Section 13.7 a detailed Access Management Plan would be produced and secured via condition. ES Volume III, Appendix 13.1: Outline Access Management Plan provides the outline framework for the future detailed Access Management Plan. The comment has not required any changes to the assessment.

Scope of the Assessment

- 13.2.5 The technical scope of this assessment has been established through the ongoing scoping process and comprises:
- Public rights of way (PRoW);
 - Tourism;
 - Businesses;
 - Employment; and
 - Spending and Gross Value Added (GVA)¹.
- 13.2.6 It should be noted that the potential for impacts on recreation use within the surrounding area resulting from construction, operational and decommissioning traffic, which could affect community severance, road safety and vulnerable road users, including walkers and cyclists, is assessed in **ES Volume II, Chapter 12: Traffic and Movement**.
- 13.2.7 Indirect impacts on walkers, cyclists and horse riders caused by visual disturbance during construction, operation and decommissioning, which could affect amenity and enjoyment of nearby walks, is assessed in **ES Volume II, Chapter 8: Landscape and Visual**.

13.3 Methodology

- 13.3.1 This assessment has been undertaken with regard to the following planning policy, advice, guidance and evidence base. It should be noted that this chapter does not assess the compliance of the Proposed Development against relevant planning policy. Such an assessment is presented in the **Planning, Design and Access Statement**, which is submitted as part of the DNS Application.

Legislation

- The Wellbeing of Future Generations (Wales) Act 2015. This provides Welsh Government policy direction which seeks to improve the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales; several of these are linked to the environment, climate change and a low carbon society:
 - Goal 1: A prosperous Wales, aims for “An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change)”;
- Goal 2: A resilient Wales, aims for Wales to adapt “*to change (for example climate change)*”; and
- Goal 7, A Globally Responsible Wales aims for “a nation which, when doing anything to improve the economic, social, environmental and cultural well-

¹ GVA is a measure of economic productivity that quantifies the contribution of an entity (company, industry or area) to an economy, producer or sector.

being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being”.

National Planning Policy

- Prosperity for All: The National Strategy (Welsh Government, 2017). This Strategy sets out a number of key themes, within which are a series of objectives. One objective includes an aim to *“Drive sustainable growth and combat climate change”* and states that *“Low carbon energy generation and greater use of renewable energy sources, including community energy schemes have the potential to cut carbon emissions while benefiting local areas”*;
- Prosperity for All: Economic Action Plan, Welsh Government, 2019. This Plan highlights areas where funding support will be provided, such as on businesses that align with the government’s decarbonisation objectives, support skills development and provide high quality employment. The Plan seeks to *“benefit from the opportunities arising from the shift from a fossil fuel to a low carbon based economy and for this transition to support a transformation in our prosperity, health and well-being”*;
- Future Wales: The National Plan 2040 (Welsh Government , 2021)
 - This is the national development framework to guide the direction of development in Wales. The Plan refers to the Economic Action Plan (detailed above), and with relevance to the Proposed Development states that it *“supports a low carbon economy and the decarbonisation of industry, and the growth of sustainable and renewable energy recognises the importance of key future sectors such as advanced engineering, renewable technologies, Artificial Intelligence, transport, automation and digital innovation supports infrastructure development, including transport, energy, and digital communications”*;
- Planning Policy Wales (Welsh Government Llywodraeth Cymru, 2024).
 - This provides a framework for the effective preparation of development plans by Local Planning Authorities. Planning Policy Wales recognises that to achieve sustainable development, *“it must reconcile the needs of development and conservation, securing economy, efficiency and amenity in the use of land, ensuring the sustainable management of natural resources and protecting, promoting, conserving and enhancing the built and historic environment”*;
- Technical Advice Note 23: Economic Development (Welsh Government / Llywodraeth Cymru, February 2014)). Planning Policy Wales is supplemented by a series of Technical Advice Notes (TANs). TAN23 provides detail on the importance of measuring economic benefit when appraising planning applications. It states that *“where economic development would cause environmental or social harm which cannot be fully mitigated, careful consideration of the economic benefits will be necessary”*; and

- Welcome to Wales: Priorities for the visitor economy 2020 – 2025 (Welsh Government, 2020). This document sets out the importance of the tourism industry in Wales. It highlights that *“It is one of the country’s fastest growing sectors and benefits many rural areas as the main driver of the economy and source of employment”*. The main goal is to *“harness the potential for tourism to improve the wider economic wellbeing of Wales”*.
- Clean Energy Jobs Plan (UK Government , 2025). As part of the UK’s Industrial Strategy, this plan identifies how the UK Government intends to work with the devolved governments to bolster skills and employment opportunities in the ‘clean energy’ sector.

Local Planning Policy

Bridgend Replacement Local Development Plan (LDP) 2018-2033 (Bridgend County Borough Council, 2024)

- 13.3.2 The LDP identifies key applicable national and regional issues. Those considered relevant to the Proposed Development include:
- *“The valleys, whilst facing economic and social challenges should aim to become attractive yet affordable places...”(NR4); and*
 - *“The need to tackle the climate emergency and contribute towards meeting national renewable and low carbon energy generation targets, taking advantage of the County Borough’s topography... The Replacement LDP needs to identify appropriate locations to support opportunities for district heating, local renewable and low carbon energy projects, as well as to encourage an element of local ownership.” (NR5)*
- 13.3.3 A series of local issues and drivers are also identified. Those considered relevant to the Proposed Development include:
- *“Future Wales identifies Pre Assessed Areas for Wind Energy to help meet future energy needs. Whilst the principle of developing renewable and low carbon energy from all technologies is supported, there is a need to consider the increasing development pressure for wind farms in Valleys areas in the context of appropriate siting and design to minimise visual impacts on scenic landscapes” (LS3);*
 - *“The economy of Bridgend County Borough is more relatively reliant on the manufacturing sector than Wales as a whole. There is a need to safeguard and support the existing economic and employment base across the County Borough. Equally, there is a need to attract inward investment, secure sustainable economic growth and enable diversification of the employment sector” (LS17); and*
 - *“There is a need to grow and diversify the County Borough’s visitor economy beyond the predominant ‘one day visit’ by capitalising on the area’s natural, historic and built environment to enable tourism related developments” (LS24).*

Bridgend County Borough Economic Strategy (BCBC 2022)

- 13.3.4 The Economic Strategy intends to set out a “*path to a sustainable recover that can yield economic, social and environmental returns*”.
- 13.3.5 The Strategy sets out four broad areas of focus. Of relevance to the Proposed Development are the following:
- Business Support and Workforce Development: within this area of focus the Strategy sets out that Bridgend County can “*upskill its workforce to take advantage of the economic opportunity*” that the low carbon economy presents; and
 - Low Carbon Economy: as well as upskilling its workforce, the Strategy recognises that “*green infrastructure is also an attractive economic investment and can provide places with the necessary economic engine to spur growth and job creation in the wake of the pandemic*”.

Bridgend County Borough Council Destination Management Plan 2018 – 2022

- 13.3.6 The aim of the BCBC Destination Management Plan is to “*Develop a thriving visitor economy in Bridgend which celebrates the unique strengths of the place, supports jobs, generates business opportunities and improves the range of amenities available for visitors and local people*”. BCBC is aiming for a 2 % overall growth per annum in the sector.
- 13.3.7 The Management Plan is supported by an Action Plan, which sets out a series of specific actions to assist in bringing the Management Plan to fruition.

The Neath Port Talbot County Borough Council Local Development Plan (2011-2026) (Neath Port Talbot Council , 2016)

- 13.3.8 The NPTC LDP sets out a vision for development plans over 2011-2026. The LDP highlights economic growth as being a key issue and specifies that “*in order to address the key issues of NPT, wealth creation through job growth is fundamental to achieving the LDP vision*”.
- 13.3.9 The LDP highlights that tourism has become a significant contributor to the local economy and has provided a variety of opportunities, especially within the valley areas. The strategy and policies seek to support this industry by taking a flexible approach to new tourism proposals and resisting, where possible, the loss of existing facilities.

Neath Port Talbot County Borough Council Destination Management Plan 2015-2020

- 13.3.10 The aim of the Destination Management Plan is “*To maximize the potential for growth in the Neath Port Talbot visitor economy, through the adoption of a strategic approach to the management and maintenance of a high quality visitor experience*”.

- 13.3.11 Objectives include: increasing the contribution that visitor spending makes to NPT economy; establishing NPT as a high-quality visitor experience; and developing partnerships between key tourism stakeholders.

Swansea Bay City Region Economic Regeneration Strategy (2013-2030)

- 13.3.12 This provides a framework to support south-west Wales and its future economic development. The framework intends to “*enhance the long-term prospects of the City Region economy, its business and communities*”.
- 13.3.13 The strategy recognises skills development as a fundamental part of the strategy, following the region’s struggle with unemployment since the 2008 recession. Skills, and ambition for long-term success, learning and employability are key strategic aims of the strategy.
- 13.3.14 The Strategy identifies energy as being a key sector that could drive productivity gains and boost the region’s economic competitiveness. It specifies the City Region as becoming a leading UK centre for renewable energy.

Guidance

- 13.3.15 The primary assessment guidance utilised within this assessment is the Design Manual for Roads and Bridges (DMRB) ‘LA 112 Population and Human Health’ (National Highways , 2020). It is recognised that DMRB ‘LA 112 Population and Human Health’ is primarily used when assessing transport-related developments. However, DMRB LA 112 gives direction for assessing the impacts of a development on population and health and, in the absence of other applicable guidance, DMRB LA 112 has been used and adapted as a recognised basis for undertaking population assessment.

Evidence Base

Renewable Energy and Tourism

- 13.3.16 A literature review suggests that overall research supports the premise that wind farm development has not tended to result in a serious negative economic impact on tourism and could even have wider positive impacts.
- 13.3.17 The most recent research on the economic impact of wind farms on tourism was published by BIGGAR Economics in 2021 (BIGGAR Economics, 2021). The research showed that, from an analysis of 44 wind farm case studies in Scotland, there was no correlation between wind farm development and trends in tourism employment. Indeed, the research showed that the tourism economy in local authorities that has seen the largest increase in onshore wind activity had performed the same, if not better, than other areas in Scotland.
- 13.3.18 In a 2014 position statement on wind farms (Visit Scotland, 2014), Visit Scotland highlighted that “*tourism is crucial to Scotland’s cultural and economic well-being and sustains a great diversity of businesses throughout the country*”. However, they confirmed their support for the “*drive for renewable energy*” and referred to research (Scottish Government, 2008) suggesting that wind farms have a limited

impact on visitors' decisions to go on holiday in Scotland and *“the Scottish Parliament’s Energy Committee also found no evidence that wind farms have a negative effect on the tourism industry.”*

- 13.3.19 Similarly, a study undertaken in 2013 on the impact of energy farms on visitors in Cornwall, 71 % of people stated that wind farms had no impact on their visit to Cornwall, 19 % said wind farms had a positive impact on their visit and 10 % stating they had a negative impact on their visit (Good Energy and The South West Research Company Ltd, 2013)
- 13.3.20 The results of this research are supported by a recent UK tracker survey (Official Statistics , 2021) which outlined that support for renewable energy is high, with 87 % expressing support for the use of renewables, whilst opposition to renewables was very low at 1 %. More specifically to onshore wind, the national tracker found that 80% supported onshore wind, with only 4 % opposing it. The national tracker also found that 90 % of respondents supported solar energy, with only 1 % opposing it.
- 13.3.21 Specific to Wales, the Welsh Government commissioned a study in 2014 (Regeneris , 2014) into the potential effects of onshore wind farms on the visitor economy of Wales. Case studies of local tourism in Wales found that wind farms did not have any significant impact on tourism, with the few local studies undertaken showing more visitors are positive or indifferent about wind farm developments.

Renewable Energy and Economic Impact

- 13.3.22 Research and studies have shown wind farms to have an indirect economic impact on an area through economic activity and employment generated by their supply chain. A study commissioned by Renewable UK in 2012 (Renewable UK, 2012) calculated that for every megawatt (MW) of wind energy constructed, approximately £7,500 is spent in the local area on accommodation and food and drink by workers involved in these projects.
- 13.3.23 It is estimated by Renewable UK that the renewable sector contributes more than £100 million to the Welsh economy, in terms of expenditure on staff, goods and services and sub-contracting to the Welsh Economy. When combined with the indirect impact referred to above, it is estimated that the total contribution of the sector is over £150 million to the Welsh economy (Renewable UK).
- 13.3.24 Renewable solar developments help to support economic activity during the construction, operational and maintenance phases. In 2024, solar developments contributed approximately £1.3 billion of Gross Value Added to the UK economy and supported 13,000 jobs (Solar Energy UK, 2025).
- 13.3.25 A RenewableUK Cymru poll highlighted that Welsh respondents expressed significant worry about energy costs. 90% of people in Wales stated that the advancement of renewable energy should be a “crucial consideration” for the government to reduce future energy bills (Renewable UK).

Rent and Rates Payable

- 13.3.26 Renewable energy projects result in rent and rates that can benefit the local and/or regional economy. In Wales, business rates are collected by local authorities and paid into a national “pool” administered by the Welsh Government. They are then redistributed to Welsh local authorities for the provision of services (Welsh Parliament, 2024). Wind farms in Wales pay approximately £10,000 per annum per 1 MW installed capacity in business rates.

Baseline Characterisation

Extent of the Study Area

- 13.3.27 The potential impacts of the Proposed Development have been assessed at varying spatial scales to reflect the nature of the potential effects considered and the geographical reach of any impacts.

Walkers, Cyclists and Horse Riders

- 13.3.28 The assessment of potential effects to walkers, cyclists and horse riders as a result of impacts to the PRow network is limited to the location where users are likely to experience any disruption in terms of travel time and/or routing. The study area is therefore confined to land within the Site and a radius extending 500 m beyond.

Businesses

- 13.3.29 The assessment of potential impacts to businesses is focused on land within the Site and a radius extending 500 m beyond, where business owners have the potential to experience a change in revenue or customer footfall due to any potential noise and visual changes.

Tourism and Recreation

- 13.3.30 Whilst evidence base documents show that there is no demonstrable correlation between the development of wind energy and negative impacts on tourism the assessment considers effects on large scale tourist attractions and small-scale tourism facilities such as overnight accommodation providers. Given intervisibility, noise and traffic and transport impacts are perceived to be the most likely causes of effect, a radius extending 20 km is considered to represent the limit within which any potential significant effects might occur (further detail is provided in **ES Volume II, Chapter 8: Landscape and Visual**).
- 13.3.31 Direct recreational effects have only been assessed for receptors within the Site, while recreational impacts occurring outside the Site are deemed indirect and are considered within a 5 km study area from the Site boundary.

Employment, Spending and GVA

- 13.3.32 Construction employment is highly mobile, and travel to work patterns are typically far wider than average within the construction sector. Research from a Construction Industry Training Board (CITB) survey suggests that the Proposed Development would draw the greatest proportion of its construction staff from within Wales. Therefore, 'Wales' has been used as a study area to consider impacts to employment, spending and GVA.
- 13.3.33 It is noted that workers are not spread evenly over this study area, with a greater propensity for workers to live closer to their place of work. This is important to focus the activity of where skills development, local investment and increased daily expenditure may be expected as a result of the Proposed Development. As such, Neath Port Talbot Council (NPTC) and Bridgend County Borough Council (BCBC) local planning authority areas have been used as the 'local area' for assessment purposes as it accords with administrative geographies with a statutory interest in economic development.

Desk Study

- 13.3.34 In order to establish the baseline conditions within the study area, data has been obtained from the following sources:
- Bridgend County Borough Council (2022). Destination Management Plan;
 - Bridgend County Borough Council (2024). Adopted Replacement Local Development Plan 2018-2033;
 - Bridgend County Borough Economic Strategy;
 - Construction Industry Training Board (2023). Workforce Mobility and Skills in the UK Construction Sector 2022;
 - HM Treasury (2024). The Green Book;
 - Homes and Community Agency (2014). Additionality Guide. Fourth Edition;
 - Long Distance Walkers Association (2025). Ogwr Ridgeway Walk/ Taith Fford Las Ogwr;
 - Neath Port Talbot (2025). The Dramatic Heart of Wales;
 - Neath Port Talbot Council (2016). Adopted LDP (2011-2026);
 - Neath Port Talbot (2023). Destination Management Plan 2023-2028;
 - Nomis (2023). Business Register and Employment Survey; and
 - Nomis (2024). UK business counts.

Field Study(s)

- 13.3.35 Beyond general site and area familiarisation, there has been no additional specific site visits or primary surveys undertaken to inform the existing baseline conditions.

Assessment Methodology

- 13.3.36 Consideration has been given to the presence and number of receptors identified within the respective study areas through the creation of a baseline socio-economic profile. Where receptors are absent from the study area, no further consideration has been given to the potential for significant effects to occur.

- 13.3.37 For each receptor that is present, professional judgement has been used to consider the likely effects that the Proposed Development would have and to determine if the effect is likely to be beneficial, neutral or adverse. The effect is then quantified with regard to the nature of the impact, the probability of the impact and the duration, frequency and reversibility of the impact.
- 13.3.38 For any level of adverse impact identified through this process, consideration is given to the implementation of additional mitigation measures in order to remove, reduce or minimise the level of effect. For any beneficial impacts identified, consideration is given to the measures that could be implemented in order to enhance the level of effect.
- 13.3.39 The residual effects are then assessed taking into account any additional mitigation measures proposed.

Assessment Criteria

Receptor Value (Sensitivity)

- 13.3.40 Criteria to determine the value (sensitivity) of each receptor to change are presented in **Table 13.3**. These criteria are based on DMRB LA 112 (National Highways, 2020) and professional judgement.

Table 13.3 Receptor Value (Sensitivity)

Receptor Value (Sensitivity)	Description
Very High	Businesses: - Existing employment sites (excluding agriculture) >5 ha. PRoW: - National trails and routes likely to be used for both commuting and recreation that record frequent (daily) use. Such routes connect communities with employment land uses and other services with a direct and convenient walkers, cyclists and horse riders route. Little/no potential for substitution; or - Routes regularly used by vulnerable travellers such as the elderly, school children and people with disabilities, who could be disproportionately affected by small changes in the baseline due to potentially different needs. Tourism, Employment, Spending and GVA Receptors: - Has no capacity to absorb or respond to change without noticeable socio-economic loss or gain.
High	Businesses: Existing employment sites (excluding agriculture) covering >1 –5 ha. PRoW:

Receptor Value (Sensitivity)	Description
	- Regional trails and routes (e.g. promoted circular walks) likely to be used for recreation and to a lesser extent commuting, that record frequent (daily) use. Tourism, employment, spending and GVA receptors: - Has limited capacity to absorb or respond to change without noticeable socio-economic loss or gain; or - Is of high socio-economic, land use, recreational, or tourism value; or - Is of national or international importance; or - Is accorded priority in national policy; or - Has no alternatives with available capacity within its study area; or - Is a destination in its own right (as regards tourism and visitor attractions).
Medium	Businesses: - Existing employment sites (excluding agriculture) covering <1ha; or - Small local business. PRoW: - Public rights of way and other routes close to communities which are used for recreational purposes (e.g. dog walking), but for which alternative routes can be taken. These routes are likely to link to a wider network of routes to provide options for longer, recreational journeys. Tourism, Employment, Spending and GVA Receptors: - Has some capacity to absorb or respond to change and may result in some perceptible noticeable socio-economic loss or gain; or - Has moderate capacity to absorb change without fundamentally altering its present character; or - Has a moderate socio-economic, land use, recreational or tourism value; or - Is of regional importance; or - Is accorded priority in local policy; or - Has some alternatives with available capacity within its study area; or - Is a destination for people already visiting the area (as regards tourism and visitor attractions); or - Forms a cluster of low sensitivity receptors.

Receptor Value (Sensitivity)	Description
Low	Businesses: - Proposed development on unallocated sites providing employment with planning permission/ in the planning process. PRoW: - Routes which have fallen into disuse through past severance or which are scarcely used because they do not currently offer a meaningful route for either utility or recreational purposes. Tourism, Employment, Spending and GVA Receptors: - Has the capacity to absorb or respond to change with hardly perceptible socio-economic loss or gain; or - Is tolerant of change without detriment to its character; or - Is of low socio-economic, land use, recreational or tourism value; or - Is of local importance; or - Is accorded low priority in policy; or - Has a choice of alternatives with available capacity within its study area; or - Is an incidental destination for people already visiting the area (as regards tourism and visitor attractions).
Negligible	Businesses: N/A PRoW: N/A Tourism, employment, spending and GVA receptors: - The socio-economic receptor has the capacity to absorb or respond to change with no socio-economic loss or gain; or - The receptor is resistant to change and is of low socio-economic, land use, recreational or tourism value; or there is a wide choice of alternatives with available capacity within its study area.

Magnitude of Impact (Change)

13.3.41 Criteria for determining the magnitude of impact (change) for each receptor are detailed in **Table 13.4**. These criteria are based on DMRB LA 112 (National Highways , 2020) and professional judgement.

- 13.3.42 The magnitude of impact (change) upon each receptor has been determined by considering the change experienced from the baseline conditions, subject to the consideration of embedded mitigation.

Table 13.4 Magnitude of Impact (Change)

Magnitude of Impact (Change)	Typical Description
Major	Businesses: • Loss of resource and/or quality and integrity of resource; severe damage to key characteristics, features or elements. E.g., direct acquisition and demolition of buildings and direct development of land to accommodate highway assets; and/ or • Introduction (adverse) or removal (beneficial) of complete severance with no/full accessibility provision; and/ or • Major loss or improvement to key elements/features of the baseline conditions such that post development character/composition will fundamentally change. PRoW: • 500 m increase (adverse)/ decrease (beneficial) in walker, cyclists and horse riders journey length; or • An impact that would be expected to cause a major restriction of access to or availability of assets in the study area or would result in a major change to existing patterns of use. Tourism, employment, spending and GVA: • Substantial change to the socio-economic receptor in terms of employment levels, output or productivity; and/ or • An impact that would dominate over baseline tourism and visitor economy conditions; and/ or • A substantial change to socio-economic loss or gain in the area of impact affecting a large number of people (100+) and/or businesses; and/ or • (30+) to the extent of changing the business and employment structure.
Moderate	Businesses: • Partial loss of/damage to key characteristics, features or elements, e.g. partial removal or substantial amendment to access or acquisition of land compromising viability of property, businesses, community assets or agricultural land holdings; and/or

Magnitude of Impact (Change)	Typical Description
	• Introduction (adverse) or removal (beneficial) of severe severance with limited/moderate accessibility provision; and/ or • Loss or improvement to key elements/features of the baseline conditions such that post development character/composition will noticeably change. PRoW: • 250 m - 500 m increase (adverse) or decrease (beneficial) in walkers, cyclists and horse riders journey length; and/ or • An impact that would be expected to have a moderate restriction of access to or availability of assets in the study area or would result in a moderate change to existing patterns of use. Tourism, employment, spending and GVA: • Notable changes to the socio-economic receptor in terms of employment levels, output or productivity; and/ or • An impact that would be expected to result in a moderate change to baseline tourism and visitor economy conditions; and/ or • A partial change to socio-economic loss or gain in the area of impact affecting a sizeable number of people (20-100) and/or businesses (10-30) to the extent of adjusting business operations and employment.
Minor	Businesses: • A discernible change in attributes, quality or vulnerability; minor loss of, or alteration to, one (maybe more) key characteristics, features or elements, e.g., amendment to access or acquisition of land resulting in changes to operating conditions that do not compromise overall viability of property, businesses, community assets or agricultural holdings; and/ or • Introduction (adverse) or removal (beneficial) of severance with adequate accessibility provision; and/or • Changes to key elements/features of the baseline conditions will be detectable but not material such that post development character/composition will be similar to pre-development conditions. PRoW:

Magnitude of Impact (Change)	Typical Description
	• 50 m - 150 m increase (adverse) or decrease (beneficial) in walkers, cyclists and horse rider's journey length; and/ or • An impact that would be expected to have a small restriction of access to or availability of assets in the study area or would result in a small change to existing patterns of use. Tourism, employment, spending and GVA: • Slight/hardly perceptible change to the socio-economic receptor in terms of employment levels, output or productivity; and/ or • An impact that would be expected to result in a perceptible difference to baseline tourism and visitor economy conditions; and/ or • A small change to socio-economic loss or gain in the area of impact affecting a group of people (<20) and/or businesses (<10) to the extent of influencing business activities and employment opportunities.
Negligible	Businesses: • Very minor alteration to one or more characteristics, features or elements. e.g. acquisition of non-operational land or buildings not directly affecting the viability of property, businesses, community assets or agricultural holdings; and/or • Very minor introduction (adverse) or removal (beneficial) of severance with adequate accessibility provision. PRoW: • Less than 50 m increase (adverse) or decrease (beneficial) in walkers, cyclists and horse riders journey length; and/ or • An impact that would be unlikely to result in a noticeable difference to assets in the study area. Tourism, employment, spending and GVA: • No perceptible change to the socio-economic receptor in terms of employment levels, output or productivity; and/ or • An impact that would not be expected to result in a measurable variation from baseline tourism and visitor economy conditions; and/ or

Magnitude of Impact (Change)	Typical Description
	No change to socio-economic loss or gain in the area of impact affecting no people and/or businesses permanently and very few people (<10) and/or businesses (<5) temporarily (for less than 1 year).
No change	Businesses/ PRow: - No loss or alteration of characteristics, features, elements or accessibility; no observable impact in either direction. Tourism, employment, spending and GVA: - No change to the socio-economic receptor in terms of employment levels, output or productivity.

Significance of Effect

- 13.3.43 The significance of effect is determined by combining the value (sensitivity) of the affected receptor and the magnitude of the impact (change). **Table 13.5** shows how the significance of effects has been determined, the criteria for which are based on DMRB LA 112 (National Highways , 2020) and professional judgement.

Table 13.5 Significance Criteria

Receptor Value (Sensitivity)		Magnitude of Impact (Change)				
		No change	Negligible	Minor	Moderate	Major
	Very High	Neutral	Slight	Moderate or large	Large or very large	Very large
	High	Neutral	Slight	Slight or moderate	Moderate or large	Large or very large
	Medium	Neutral	Neutral or slight	Slight	Moderate	Moderate or large
	Low	Neutral	Neutral or slight	Neutral or slight	Slight	Slight or moderate
	Negligible	Neutral	Neutral	Neutral or slight	Neutral or slight	Slight

- 13.3.44 Residual effects that are within the moderate, large or very large categories are considered significant, whilst residual effects that are neutral or slight are considered not significant.
- 13.3.45 Where the significance matrix indicates a range for the effect significance (e.g. 'slight or moderate'), professional judgement can be applied to select one option (which would be justified by evidence, as appropriate), or an effect significance range can be applied.

- 13.3.46 Where a range for the effect of significance means that the effect could be either significant or not significant, professional judgement has been applied to define the significance (for example with the range 'slight to moderate', where slight would be not significant, but moderate would be significant). Where both categories within the range fall within either 'significant' or 'not significant', the range has not been adjusted to a single descriptor (for example if the range is 'neutral or slight', as both effects are considered to be not significant; or if the range is 'large or very large', as both effects are considered to be significant).

13.4 Baseline Conditions

Existing Baseline

Current Land Use within the Site

- 13.4.1 The Site is dominated by fields bordered by hedgerows, mixed woodland, gorse and bramble scrub and fen marsh and swamp. Areas of grassland are actively grazed by both sheep and cows, with areas also being mown for silage. Four residential properties and their associated farmsteads are dispersed across the Site.
- 13.4.2 The topography of the Site falls in multiple directions from localised high points at Mynydd Baeden and Mynydd Ty-talwyn.

Basis of Population Profile

- 13.4.3 The Proposed Development is located across the BCBC and NPTC local planning authorities and therefore the baseline characteristics of the population profile has been informed by population data from these local authority areas (hereafter the 'local area').

Demographic Background

- 13.4.4 2021 Census data estimated that the population of the local area was around 287,800. The population of the local area has increased since the 2011 Census. The population increase of the local area between 2011 and 2021 was greater than the average population increase for Wales (Office for National Statistics , 2022).
- 13.4.5 Data taken from the 2021 Census shows an age profile of the local area compared against the age profile of Wales (see **Table 13.6** below). The age profile of the local area (Office for National Statistics , 2023) is comparable to the average for Wales (Office for National Statistics, 2023). The age profile of the local area and Wales shows a generally ageing population.

Table 13.6 Age Profile of the Local Area and Wales

Age	Local Area (%)	Wales (%)
Aged 15 years and under	17.8	17.6
Aged 16 to 24	9.8	10.6

Age	Local Area (%)	Wales (%)
Aged 25 to 35	12.5	12.3
Aged 36 to 49	18.1	17.6
Aged 50 to 64	20.9	20.5
Aged 65 and over	20.9	21.3

Economic Activity, Employment and Unemployment

- 13.4.6 **Table 13.7** provides the labour market profile of the local area (Office for National Statistics, 2024) and Wales (Office for National Statistics, 2024).
- 13.4.7 The economically active population comprises individuals aged 16 and over that contribute to the supply of labour for the production of economic goods and services. People that are typically 'economically inactive' include individuals that are retired, looking after home or family, disabled or long term sick or a student.
- 13.4.8 Economic activity rates are marginally lower within the local area when compared to Wales.
- 13.4.9 The local area has a greater number of individuals that are economically inactive due to long-term sickness or disability when compared against the average for Wales. There are fewer economically inactive individuals that are students within the local area than across Wales as a whole. The proportion of other denominators of economic inactivity are broadly similar across the local area and Wales.

Table 13.7 Economic Activity Rates in the Local and National Study Areas

Measure	Local	Wales
Total working age residents	236,664	2,559,416
Economically active population, Census 2021 (%)		
Economically active	52	53.5
Economically inactive	45.1	43.4
Unemployed	2.9	3.1
Economic inactivity, Census 2021 (%)		
Retired	55.2	56.8
Student	10.4	13.1
Looking after home or family	10.2	9.9
Long-term sick or disabled	16.6	13.6
Other	7.6	6.7

Employment

- 13.4.10 The latest employment estimates for the study areas are for 2023. At that time, there were an estimated 108,750 jobs in the local area (Nomis, 2023).

Construction Employment

- 13.4.11 There were around 6,555 jobs within the construction sector across the local area (Nomis, 2023)² and 72,025 construction jobs across.

Table 13.8 Employment by Industry in the Construction Sector 2023

Construction SIC Code Industries	Local area	Wales
TOTAL	6,805	77,025
Construction Jobs as a proportion of Total jobs	6.26 %	5.69 %

- 13.4.12 When analysing the data from 2023, the concentration of construction jobs is marginally higher in the local area and Wales.

Critical Employers

- 13.4.13 There are a small number of critical strategic employers in the local area including most notably Tata's Port Talbot Steelworks. Until recently (September 2024), Tata Port Talbot Steelworks employed approximately 4,000 staff directly, with significant indirect employment in supporting businesses.
- 13.4.14 In 2011, estimates highlighted Tata Steel contributed 8 % of Welsh industrial and extractives economic output and 3 % of total Welsh economic output. This made it the largest private sector contributor to economic output in Wales.
- 13.4.15 Tata Steel agreed a joint investment package with UK Government to facilitate conversion of the works to electric arc furnace steelmaking, resulting in the loss of up to 3,000 jobs. This recently received planning permission (NPTC planning reference: P2024-0711).

Economic Activity

- 13.4.16 In 2024, there were approximately 6,860 enterprises within the local area, 105,235 in Wales and 2,724,770 in the UK (nomis, 2024). Of those, there are approximately 1,090 construction businesses within the local area comprising approximately 15.9 % of all enterprises, which is slightly higher than the proportion of construction enterprises across Wales at 14.2 % and the UK at 14.4 %.
- 13.4.17 **Table 13.9** sets out the estimated Gross Value Added (GVA) (current price) and sectoral GVA in 2022 within the construction sectors in the local area and Wales (Office for National Statistics , 2024).

Table 13.9 Estimated Construction Industry GVA

GVA	Local Area	Wales
Construction	£466 million	£4,746 million
Total GVA (All Sectors)	£6,302 million	£74,545 million

² Employment jobs within the following SIC codes: SIC 281, SIC 282, SIC 284, SIC 289, SIC 411, SIC 412, SIC 421, SIC 422, SIC 429, SIC 431, SIC 432, SIC 433, SIC 439 and SIC 712

Qualifications and Apprenticeships

- 13.4.18 Approximately 27.9 % of the population of the local area, have Level 4 or equivalent qualifications (certificate of higher education, higher apprenticeship, higher national certificate, level 4 award, certificate, diploma or NVQ); this is slightly lower than the average for Wales at 31.5 %. The proportion of the local area with no qualifications is also higher than the national average (Office for National Statistics , 2023).

Occupational Skills

- 13.4.19 The 2021 Census data suggests that 16.9 % of employed residents in the local area are recorded to be employed in a 'professional' occupation; this is slightly lower than the proportion of people employed in professional occupations across the Wales (Office for National Statistics , 2024).
- 13.4.20 Despite this, the proportion of residents working in skilled trade occupations in the local area is recorded to be marginally lower than the proportion within Wales.
- 13.4.21 When analysing the proportion of low-skilled occupations (sales and customer service, process, plant and machine operatives and elementary occupations) within the local area against the national average, the concentration of low-skilled occupations is slightly higher in the local area than the Wales, as shown in **Table 13.10**.

Table 13.10 Workforce by Occupational Skill

Occupation	Local Area		Wales	
	No.	%	No.	%
Managers, directors and senior officials	11915	9.7	143938	10.5
Professional occupations	20823	16.9	249466	18.2
Associate professional and technical occupations	14770	12.0	161273	11.8
Administrative and secretarial occupations	12509	10.2	128116	9.4
Skilled trades occupations	14339	11.6	166613	12.2
Caring, leisure and other service occupations	14594	11.8	153029	11.2
Sales and customer service occupations	10561	8.6	114559	8.4
Process, plant and machine operatives	10537	8.6	107475	7.9
Elementary occupations	13125	10.7	143982	10.5

PRoW

- 13.4.22 The recreational resources within the study area comprise a variety of public footpaths, byways, bridleways and walking trails.

13.4.23 The Owgr Ridgeway Walk (Taith Fford Las Ogwr), a local promoted walk, crosses the Site in an east-west alignment. The walk forms part of a longer ridge walk across South West Wales, connecting the Taff-Ely Ridgeway Walk with the Coed Morgannwg Way (Long Distance Walkers Association , 2025)

13.4.24 There are 22 PRoW within the Site:

- Public Footpaths (FP):
- Llangynwyd Lower (LDL) – FP 3, 4, 5, 8, 9, 10, 11, 12, 13 and 14; and
- Llangynwyd Middle (LDM) – FP 4, 5, 6, 7, 21, 22, 23, 24, 25 and 41.
- Neath Port Talbot – 9/64.PT/3
- Bridleway (5 Llangynwyd Middle (BW 5 LDM)).

13.4.25 There are also multiple PRoW and bridleways located within 500 m of the Site.

Tourism and Recreation

13.4.26 In 2021, the economic impact of the tourist economy in Bridgend equated to approximately £225.14 million and welcomed approximately 2.08 million visitors, 85 % of which were day visitors to the area. The Bridgend tourist economy supports approximately 2,482 jobs (Bridgend County Borough Council , 2022) equating to approximately 3.82 % of the total workforce.

13.4.27 In 2019³, £129.3 million was generated from the Neath Port Talbot visitor and tourist economy with approximately 1.51 million annual tourism visits, 76 % of which were day visitors. The Neath Port Talbot visitor economy supported approximately 1,626 full time equivalent jobs (Neath Port Talbot Council , 2023) equating to approximately 2.47 % of the total workforce.

13.4.28 Both BCBC and NPTC have current 'Destination Management Plans' (Bridgend County Borough Council , 2022) (Neath Port Talbot Council , 2023), which highlight the importance of the tourism industry as a growing economy and outlines the intention to develop the industry further across both local planning authorities.

13.4.29 There are several large-scale tourism projects such as the Afan Valley Adventure Park and the Rheola House Projects, as well as Neath Port Talbot Council's own initiatives based around Margam Country Park, Afan Forest Park and Glyncorrwg Mountain Bike Centre, and the Aberavon Seafront in the local area.

13.4.30 The Visit Bridgend website (Visit Bridgend , 2025) describes that Bridgend appeals to visitors due to the area's local scenery, beaches and historic sites. The main visitor attractions include golf, The Valleys, local beaches, local heritage and nature reserves. Potential tourist attractions have been identified using the Visit Bridgend website and are as follows:

- Bridgend Town Centre (located approximately 5 km south from the Site);
- Maesteg Historic Town Centre (located approximately 3.6 km north from the Site);

³ 2019 data is used in the Neath Port Talbot Destination Management Plan to reflect the pre-COVID 19 tourism economy.

- Pencoed (located approximately 9 km southeast from the Site); and
- Porthcawl seaside town (located approximately 8.8 km from the Site);

13.4.31 There are 37 main tourist attractions listed on the Visit Bridgend website and on the Discover Neath Port Talbot website (Discover Neath Port Talbot, 2025) lie within 20 km of the Site. These can be grouped as follows:

Table 13.11 Tourist Attractions within the 20 km Study Area

Distance	Tourist Attraction
0-5 km	14
5-10 km,	16
10-20 km	7

13.4.32 One area of growth in the local area has been the development of small scale tourism facilities, with a number located within the communities that surround the Site. These can take the form of overnight accommodation as well as companies which support the growing walking and particularly cycle related activities.

13.4.33 Attractions relating to sport and leisure, art galleries, visitor centres/gift shops and museums have been discounted from further assessment as the main features of these attractions, which provide the majority of their tourism amenity value, relate to indoor experiences or activities centered on the immediate environment; therefore, they could not be substantially visually impacted by the Proposed Development in a way that could cause a significant effect.

13.4.34 Attractions relating to historical sites could be visually impacted by the Proposed Development. However, the findings of **ES Volume II, Chapter 7: Cultural Heritage** indicate that there would be no significant effects on cultural significance of any of the historical sites, so these have been discounted from further assessment.

Businesses

13.4.35 There is one business located within the Site:

- Cefn Park Motocross Track is located towards the south of the Site, west of Ffordd-Y-Gyfraith and is a cross track suitable for all abilities.

13.4.36 A further eleven local businesses have been identified within the 500 m study area, which are deemed sensitive to changes in their existing environment. These are shown in **Table 13.12**.

Table 13.12 Business's within the 500 m Study Area

Local Business	Distance to Site
Falconry Services	This business is located approximately 40 m south of the Site and specialises in bird and pest control.
Wiggleys Fun Farm	This business is located approximately 335 m south of the Site and approximately 1.65 km west of the proposed Site access point.

Local Business	Distance to Site
Brynhfryd Campsite	The campsite is located approximately 460 m south of the Site and approximately 1.52 km west of the proposed Site access point.
Ty Gwyneth Glamping Holidays	This 'glamping' site is located approximately 500 m south of the Site boundary and 1.5 km west of the proposed Site access point.
The Perch Ffordd Y-Gyfraith	This holiday home is located approximately 500 m south of the Site and 1.5 km west of the proposed Site access point.
Dogs unleashed	This dog park business is located adjacent to the Site boundary.
The Cabin in the Woods	This holiday home facility is located adjacent to the south of the Site.
Risca Prog Lodge	This business is located adjacent to the south of the Site and is a self-contained recording studio, which operates Saturdays and Sundays between 9am and 5pm.
Sŵn y Nant	This holiday home is located adjacent to the Site and approximately 345 m west of the proposed Site access.
Fairfield Motorsports	This business is located approximately 480 m north of the Site and is a vehicle movement company. The company access is off the A4063 Maesteg Road.
WEPA UK Ltd	WEPA UK Ltd is located approximately 385 m north of the Site and is a paper mill operating 24 hours, 7 days a week.

Sensitive Receptors

13.4.37 **Table 13.13** sets out the receptors scoped into the assessment and their assigned value (sensitivity).

Table 13.13 Sensitive Receptors

Receptor	Discussion	Value (sensitivity)
PRoW	PRoWs within the study area are mostly used for recreational purposes. The Ogwr Ridgeway Path is a promoted long-distance walk and forms part of a wider walking route across south-west Wales. There are also numerous local PRoWs in the study area.	High - Medium
Tourism	The tourism industry within the study area is currently being managed through local	Medium - Low

Receptor	Discussion	Value (sensitivity)
	planning policy with the intention to increase and develop the local tourist economies. As the industry is currently being managed by the local authorities, the receptor has little capacity to absorb or respond to change.	
Businesses	There are 12 small private businesses within the study area, employing a small number of staff.	Medium
Employment and Labour Market – local area	The labour market area is large in scale, with a higher than average concentration of employment and a range of skills.	Low
Employment and Labour Market – Wales	The labour market is large in scale, with a marginally higher than average concentration of employment within the sector.	Low

Future Baseline in the Absence of the Proposed Development

- 13.4.38 In the absence of the Proposed Development, the land would likely continue to be managed for agricultural and grazing purposes.
- 13.4.39 It is possible that the level of tourism in the area, the level of employment and subsequent GVA and the level of educational attainment might increase in line with local policy to promote the area for tourism.

13.5 Mitigation Embedded into the Design

- 13.5.1 This assessment has been based on the principle that measures have been ‘embedded’ into the design of the Proposed Development to remove potential significant effects as far as practicable, for example by the considered placement of infrastructure, good practice measures in regards to traffic management, control of noise and dust, signage and provisions for maintaining access for walkers.

13.6 Assessment of Likely Effects (Without Additional Mitigation)

Construction

PRoW

- 13.6.1 There could be temporary direct impacts affecting accessibility on the recreational routes within the Site and surrounding area during construction activities, such as the requirement to temporarily divert or temporarily close the PRoW in some locations (which would be subject to the necessary consents being obtained from the local highway authority).

Tourism

- 13.6.2 Throughout the construction phase, the Proposed Development would benefit the local economy through expenditure on the purchasing of temporary accommodation, food, drink, fuel and other services of personal welfare needed to sustain a construction workforce.
- 13.6.3 However, there is the potential for short term temporary adverse impacts on small scale tourism facilities caused by visual disturbance, traffic and transport and construction noise effects during the phase of construction.

Businesses

- 13.6.4 During construction, there may be some temporary adverse impacts to customers accessing businesses within the study area as a result of an increase in traffic numbers and heavy goods vehicles within and in close proximity to the Site.
- 13.6.5 Furthermore, there is the potential for impacts upon local businesses caused by visual disturbance, and construction noise effects during the phase of construction. However, as above, any such impacts would be temporary in nature.

Employment, Skills and Labour Market

- 13.6.6 The construction phase includes preparation of the Site, manufacturing and installation of the turbines, solar panels and balance of plant. There will be a significant investment during the construction phase over a 24-month period. The Proposed Development will provide job opportunities during the construction phase.
- 13.6.7 Where possible, materials for the construction works will be sourced from local suppliers. There may also be opportunities for local manufacturers to supply services during the construction phase.

Workforce Spending and GVA

- 13.6.8 The Proposed Development will provide direct and indirect job opportunities in the local area. During the construction phase, the Proposed Development is also likely to influence local expenditure due to an increase in temporary employment levels. It is also possible that the construction phase will lead to an increase in the number of people staying in the area overnight and therefore using local accommodation services, potentially for an extended period of time.

Operation

PRoW

- 13.6.9 It is not proposed to temporarily or permanently divert any existing PRoW during the operational phase. The existing routes through the Site would continue to be accessible for recreational users. A permissive route is proposed along part of the new on-site access tracks, which should provide a better surface which can be used more easily in inclement weather.

Tourism

- 13.6.10 Research, listed in **Section 13.3** above, has concluded that there is little evidence that renewable energy developments have any long term detrimental impacts on tourism; studies in Scotland show that the tourism economy in areas with the largest increase in wind developments have either performed the same or better since construction. Thus it is considered highly unlikely for any adverse impacts on trends in tourism employment or small scale tourism facilities in the local area or the wider tourism economy across the study area as a result of the Proposed Development.

Businesses

- 13.6.11 The potential operational effects of the Proposed Development primarily relate to changes in the visual environment. Dependant on the extent of the visual changes to the environment and the nature of the business, there may be the potential to impact local businesses.

Employment, Skills and Labour Market

- 13.6.12 The Proposed Development will support employment over the operational phase. The employment supported would include electrical engineering roles likely to require higher level skills and qualifications, as well as Site management, administrative and process/elementary occupations including security and maintenance.

Workforce Spending and GVA

- 13.6.13 The Proposed Development is expected to create jobs during its operational life which will result in a long-term increase in the amount of money being spent within the local area across services of all types. The operational phase of the Proposed Development will generate an increase in GVA.

Decommissioning

- 13.6.14 As decommissioning is likely to constitute a reversal of the activities undertaken during the construction phase, it is considered that the likely temporary effects on recreation and tourism would be the same or less. Following decommissioning, the Site would be returned to a state similar to its current condition.
- 13.6.15 In relation to employment and economic effects, there is still an absence of data regarding the likely decommissioning expenditure involved to be able to assess quantitatively.

13.7 Additional Mitigation Measures

- 13.7.1 **ES Volume III, Appendix 13.1: Outline Access Management Plan** includes measures to manage and enhance the PRoW within the Site so that users can continue to enjoy and use the PRoW during the construction and operational phase of the Proposed Development. By improving the PRoW, through enhanced signage, better access gates and a permissive route, local residents and tourists from the area are more likely to utilise these links as they are more accessible.

- 13.7.2 The Applicant seeks to limit and minimise interference with existing PRowS through implementing appropriate management measures during construction. Notices would be placed in prominent locations around the Site to outline areas of restricted access. Measures would be taken to ensure public safety during construction and periods of exclusion would be kept to the minimum necessary for safe working. Recreational users would be informed of the construction work proposed and directed into safe areas where there would be no conflict with the plant and machinery.
- 13.7.3 The Applicant is committed to maximising local supply chain opportunities. The Applicant is further committed to giving local businesses every possible opportunity to share in the financial and employment benefits of the construction and operation of the Proposed Development. If consented and constructed, the Proposed Development will offer opportunities for local businesses such as accommodation providers, hire companies, fencing contractors, tradesmen, etc. to maximise revenue through the use of an online supplier's portal. The Applicant will hold a number of "Meet the Buyer" events, providing an opportunity for local businesses and trades people to understand the opportunities associated with the construction of the Proposed Development.

13.8 Assessment of Residual Effects (With Additional Mitigation)

Construction

PRow

- 13.8.1 Any temporary direct impacts affecting accessibility on the recreational routes within the Site and surrounding area during construction activities will be managed through the measures presented in **ES Volume III, Appendix 13.1: Outline Access Management Plan**.
- 13.8.2 The value (sensitivity) of users of the Ogwr Ridgeway Walk that runs through the Site as receptors is **high**. The magnitude of impact (change) would be **minor** given the commitment to minimise disruption which would result in a small change to existing patterns of use. Therefore, there is likely to be a **temporary slight adverse** residual effect on walkers, cyclists and horse riders, which is considered to be **not significant**.
- 13.8.3 The value (sensitivity) of users of recreational routes in the wider study area as receptors is **medium** and the magnitude of impact (change), following additional mitigation to minimise disruption is **negligible**. Therefore, there is likely to be a **temporary slight adverse** residual effect on walkers, cyclists and horse riders which is considered to be **not significant**.

Tourism

- 13.8.4 Throughout the construction phase, the Proposed Development would benefit the local tourism economy through expenditure on the purchasing of overnight accommodation, food, drink, fuel and other services of personal welfare needed to sustain a construction workforce.

- 13.8.5 There is the potential for short term adverse impacts on small scale tourism facilities such as overnight accommodation providers in the local area caused by visual disturbance, traffic and transport and construction noise effects during the period of construction. However, any temporary losses that may occur in the event that tourists are deterred from visiting the local area during construction could be offset by demand for overnight accommodation by construction workers.
- 13.8.6 37 main attractions listed on the Visit Bridgend website and on the Discover Neath Port Talbot website (Discover Neath Port Talbot, 2025) lie within 20 km of the Site. With distance any potential impacts associated with visibility of the Proposed Development, construction traffic or noise disturbance will diminish.
- 13.8.7 The value (sensitivity) of small-scale tourism facilities as a receptor is **low**. The magnitude of impact (change) expected during construction is **minor** given the potential slight change in visitor numbers. Therefore, there is likely to be a **neutral** residual effect on the local tourist economy, which is considered to be **not significant**.
- 13.8.8 The value (sensitivity) of main tourist attractions within 20 km of the Proposed Development as a receptor is **medium** and the magnitude of impact (change) expected during construction would be **negligible** as any impact would be hardly perceptible. Therefore, there is likely to be a **neutral** residual effect on the main tourist economy, which is considered to be **not significant**.

Businesses

- 13.8.9 There is one business (Cefn Park Motocross Track) located within the Site and a further 11 local businesses were identified within the 500 m study area. **Table 13.14** considers the potential effects.

Table 13.14 Residual Effects to Businesses within the Study Area During the Construction Phase

Local Businesses	Potential Construction Effects
Cefn Park Motocross Track Risca Progl Lodge WEPA UK Ltd Falconry Services Wiggles Fun Farm	Due to the nature of these businesses, it is anticipated that construction related activities will not adversely affect these businesses.
Brynhfryd Campsite Ty Gwyneth Glamping Holidays The Perch Ffordd Y- Gyfraith The Cabin in the Woods Sŵn y Nant	Any visual amenity and/or noise construction impacts may adversely impact the enjoyment of users during the construction phase. These would be temporary effects, with construction only occurring during daytime hours.
Dogs unleashed	During the construction of the southern access track and solar area adjacent to the business there may be the potential for short term

Local Businesses	Potential Construction Effects
	disturbance to users enjoyment of the dog facility.
Fairfield Motorsports	Due to the nature of this business, it is anticipated that construction related landscape and visual or noise impacts will not influence customer/visitor numbers.

- 13.8.10 It is considered that six businesses may be affected by the construction of the Proposed Development through impacts relating to visual change, noise emissions and/or traffic change. Relevant mitigation measures are presented within **ES Volume II, Chapter 8: Landscape and Visual**, **ES Volume II, Chapter 9: Noise and Vibration** and **ES Volume II, Chapter 12: Traffic and Movement** respectively.
- 13.8.11 The value (sensitivity) of these businesses is **medium** and the magnitude of impact (change) following additional mitigation is **minor**. Therefore, there is likely to be a **direct, temporary, slight adverse** residual effect to businesses following the implementation of additional mitigation measures which is considered to be **not significant**.

Employment, Skills and Labour Market

- 13.8.12 The construction phase includes preparation of the Site, manufacturing and installation of the turbines, solar PV and balance of plant. There will be a significant investment during the construction phase, over a 24-month period.
- 13.8.13 The Proposed Development will provide job opportunities during the construction phase of the development. Based on professional judgement and experience of the delivery of wind and solar projects across Wales, it has been estimated that an Energy Park of this size will create approximately 215 Full Time Equivalent (FTE) jobs in Wales and 145 jobs (direct and indirect) in the local area⁴.
- 13.8.14 The employment supported by the Proposed Development will be in a range of different positions and skillsets across civil construction sectors, electrical and mechanical skills including specialised wind energy installation professionals and some non-construction and supporting roles such as security, process and administrative and transportation roles.
- 13.8.15 Where possible, materials for the construction works will be sourced from local suppliers, which has the potential for an increase in the number of jobs indirectly resulting from the Proposed Development. Should it not be possible to source materials locally, there may be a need to bring in materials from the wider regions. Whilst the wind turbines are most likely to be manufactured outside of Wales, the remaining investment is anticipated to be contained within the local area and Wales.

⁴ Data taken from comparable wind and solar energy developments Mynydd Fforch Dwm Wind Farm (DNS/3255801) and Penpergwm Solar Farm (DNS/3252305).

- 13.8.16 There will be opportunities for local manufacturers to supply services during the construction phase. The Applicant will encourage tenders from local businesses in order for them to become involved in the Proposed Development through their online local contractor portal and also advertise opportunities as part of the consultation process, including “Meet the Buyer” events. Subsequently, it may follow that these businesses may then need to upskill their staff as part of any future work.
- 13.8.17 In this way, the Applicant will utilise local suppliers and manufacturing services to create job opportunities in the local area and support local supply chains where possible.
- 13.8.18 Through utilising the local workforce directly as a result of the Proposed Development, the workforce will reinvest their wage into the local economy and services, helping to sustain jobs across a range of sectors.
- 13.8.19 The local and Welsh labour markets are relatively large, with high concentrations of civils sector employment and a range of skills.
- 13.8.20 The value (sensitivity) of the construction labour market within the local area is **low** and the magnitude of impact (change) following additional mitigation will be **moderate** due to the estimated 145 indirect and direct jobs created/safeguarded during the construction phase. Therefore, there is likely to be a **slight beneficial** residual effect which is considered to be **not significant**.
- 13.8.21 The value (sensitivity) of the construction labour market within Wales is **low** and the magnitude of impact (change) following additional mitigation will be noticeable, which is **major** due to the estimated number of jobs created during the construction phase. Therefore, there is likely to be a **slight beneficial** effect, which is considered to be **not significant**.

Workforce Spending and GVA

- 13.8.22 The Proposed Development will provide direct and indirect job opportunities in the local area. In this way, there may be benefits for the economy more widely due to the increase in disposable income as a result of greater job provision. A greater amount of disposable income or an increase in the number of people spending time in the area is likely to see an increase in the amount of money spent in local shops, car parks, general facilities and other services.
- 13.8.23 Construction employment opportunities generated as a result of the Proposed Development will produce an economic output which can be measured through the generation of GVA.
- 13.8.24 Whilst a detailed economic impact assessment has not been commissioned for this Proposed Development, based on professional judgement and experience of the delivery of wind projects across Wales, it has been estimated that an Energy Park of this size applying the appropriate GVA measures to the direct, indirect and induced employment impact generated by construction phase indicates that an additional £9.5 million in GVA could be generated annually across Wales, inclusive of £1.8 million in GVA across the local area (DNS/ 3255801: Mynydd Fforch Dwm Wind Farm , 2023).

- 13.8.25 During the construction phase, the Proposed Development is likely to influence local expenditure due to an increase in temporary employment levels. The induced effect suggests that income is reinvested into the local economy by employees through the increased use of restaurants, cafés and local shops, which will benefit the local economy due to greater local expenditure and reach of customers.
- 13.8.26 It is possible that the construction phase will lead to an increase in the number of people staying in the area overnight and therefore using local accommodation services – potentially for an extended period of time.
- 13.8.27 Investment in certain sectors results in indirect effects on others in an interconnected economy. This can lead to changes in production, sourcing, and distribution practices, influencing the entire supply chain. As such, it is anticipated that investment will be retained locally and regionally, both within the construction and energy sectors but also outside it.
- 13.8.28 In addition to those jobs supported as a direct effect of the construction of the Proposed Development, further indirect employment will be supported as a result of spin-off and multiplier effects in the supply chain, for example, in the manufacturing and supply of the solar PV panels and associated infrastructure.
- 13.8.29 Construction GVA is substantial at an estimated £9.5 in the Wales inclusive of £1.8M in the local area (DNS/ 3255801: Mynydd Fforch Dwm Wind Farm , 2023)⁵.
- 13.8.30 The value (sensitivity) of the receptor is therefore considered to be **low** at both scales. The magnitude of impact (change) in terms of GVA is considered to be **major** at both scales. Therefore, there is likely to be a **slight beneficial** effect on construction industry GVA at both scales during the construction phase, which is considered to be **not significant**.

Operation

PRoW

- 13.8.31 It is not proposed to temporarily or permanently divert any existing PRoW during the operational phase. The existing routes through the Site would continue to be accessible for recreational users and the Proposed Development. A permissive route is proposed along part of the new on-site access tracks, which should provide a better surface which can be used more easily in inclement weather. Measures presented in **ES Volume III, Appendix 13.1: Outline Access Management Plan** will be implemented during the operational phase.
- 13.8.32 The value (sensitivity) of users of the Ogwr Ridgeway Walk that runs through the Site as receptors is **high**. The magnitude of impact (change) is **negligible** given the Applicant's commitment to maintain and manage the trail during operation. Therefore, there is likely to be a **permanent slight beneficial** residual effect on walkers, cyclists and horse riders which is considered to be **not significant**.

⁵ This is a conservative estimate given that the Mynydd Fforch Dwm Wind Farm reference development has not include solar development.

- 13.8.33 The value (sensitivity) of users of recreational routes in the wider Site and study area as receptors is **medium** and the magnitude of impact (change) is **minor** given the proposed permissive route. Therefore, there is likely to be a **permanent slight beneficial** residual effect on users which is considered to be **not significant**.

Tourism

- 13.8.34 Evidence base referred to in **Section 13.3** above, concludes that the construction of wind farms does not result in negative impacts on tourism during the operational phase. The potential for impacts on tourism is closely linked to the public perception of those visiting an area and the evidence base concludes that over the UK 90% of the population is supportive of onshore wind.
- 13.8.35 The studies show that the overall effect on tourism expenditure and employment would be very limited.
- 13.8.36 The value (sensitivity) of small-scale tourism facilities as a receptor is **low** and the magnitude of impact (change) expected during operation is **negligible** as any impact would be hardly perceptible. Therefore, there is likely to be a **neutral** residual effect on the local tourist economy, which is considered to be **not significant**.
- 13.8.37 The value (sensitivity) of main tourist attractions within 20 km of the Proposed Development as a receptor is **medium** and the magnitude of impact (change) expected during operation is **no change** as any impact would be hardly perceptible. Therefore, there is likely to be a **neutral** residual effect on the main tourist economy, which is considered to be **not significant**.

Businesses

- 13.8.38 The residual operational effects of the Proposed Development primarily relate to potential effects as a result of changes in the visual environment.
- 13.8.39 There is one business located within the Site and a further eleven local businesses were identified within the 500 m study area. **Table 13.15** considers the effects on these businesses within the operational phase of the Proposed Development.

Table 13.15 Residual Effects to Businesses within the Study Area During the Operational Phase

Local Businesses	Potential Operational Effects
Cefn Park Motorcross Track	The Proposed Development has the potential to be visible to these businesses. However, given the nature of these businesses, it is expected that a change to the visual environment will not lead to any significant effects.
Risca Prog Lodge	
WEPA UK Ltd	
Falconry Services	
Dogs unleashed	
Wiggleys Fun Farm	

Local Businesses	Potential Operational Effects
Brynhfryd Campsite	This business is overnight visitor accommodation. The closest solar parcels are located c.650 m away with woodland planting screening proposed in between. The proposed turbines are located c.1.7 km from this accommodation. It is anticipated that from this receptor views would be mainly limited to blade tips, as detailed within ES Volume IV: Figure 8.4: Blade Tip ZTV to 20 km with viewpoints; at this distance the turbines would be minor components in the view, as concluded for residential properties within a similar location in ES Volume III, Appendix 8.4: Residential Visual Amenity Assessment.
Ty Gwyneth Glamping Holidays	This business is visitor accommodation. The business is located opposite Brynhfryd Campsite; it is considered that visual effects would be similar to those discussed above.
The Perch Ffordd Y-Gyfraith	This business is visitor accommodation. Located opposite Brynhfryd Campsite; it is considered that visual effects would be similar.
The Cabin in the Woods	This business is visitor accommodation. The closest solar parcel is located at c.160 m distance with significant existing woodland planting screening. The proposed turbines are located c.2 km from this accommodation. Given the extensive existing landscape screening, views of the turbines are not anticipated.
Sŵn y Nant	This business is visitor accommodation. The closest solar parcel is located at c.90 m distance with filtered mature tree screening. The proposed turbines are located c.2 km from this accommodation. ES Volume III, Appendix 8.4: Residential Visual Amenity Assessment, concludes there would be minor/negligible effects from the proposed turbines at this location.

- 13.8.40 It is considered that five visitor accommodation businesses have the potential to be affected by the operation of the Proposed Development through a change in views. However, as referred to previously, the potential for impacts on tourism is closely linked to the public perception, and research has shown that public opinion of renewable energy schemes are generally supportive, with 80 % supporting onshore wind and 90 % supporting solar. Further, research in Scotland has concluded that the presence of wind farms had limited impacts on people's choice of holiday location and Welsh specific studies have found that wind farms did not

have significant impacts on the tourism economy, which includes overnight accommodation.

- 13.8.41 The value (sensitivity) of these businesses is **medium** and the magnitude of impact (change) following additional mitigation is **negligible**. Therefore, there is likely to be a **direct, permanent, neutral** residual effect to businesses following the implementation of additional mitigation measures which is considered to be **not significant**.

Employment, Skills and Labour Market

- 13.8.42 The Proposed Development will support employment over the operational phase. The employment supported would include electrical engineering roles likely to require higher level skills and qualifications, as well as Site management, administrative and process/elementary occupations including security and maintenance.
- 13.8.43 It is recognised these roles are likely to be specialised positions and therefore would be expected to appeal to candidates both locally and from a wider geographical area.
- 13.8.44 The total number of workforce staff required during operation is currently uncertain, however, based on professional judgement and experience of the delivery of wind projects across Wales, it has been estimated that an Energy Park of this size will create or safeguard approximately 429 (direct and indirect) FTE jobs Wales and/or the local area over the operational lifetime of the Proposed Development⁶. Should it not be possible to source construction staff locally, there may be a need to bring in staff from the wider regions.
- 13.8.45 Due to the 50-year lifespan of the operational phase of the Proposed Development, these skills can be passed through generations of the local workforce, creating future job security.
- 13.8.46 The local and Welsh labour markets are relatively large, with high concentrations of civils sector employment and a range of skills.
- 13.8.47 The value (sensitivity) of the operational labour market within the local area is **low** and the magnitude of impact (change) following additional mitigation is **moderate** due to the estimated 55 jobs (indirect and direct) that would be created or safeguarded during the operational phase. Therefore, there is likely to be a **slight beneficial** residual effect which is considered to be **not significant**.
- 13.8.48 The value (sensitivity) of the operational labour market within Wales is **low** and the magnitude of impact (change) following additional mitigation is **moderate** due to the estimated 429 jobs (direct and indirect) created or safeguarded across Wales during the operational phase. Therefore, there is likely to be a **slight beneficial** effect, which is considered to be **not significant**.

⁶ Data taken from comparable wind and solar energy developments Mynydd Fforch Dwm Wind Farm (DNS/3255801)

Workforce Spending and GVA

- 13.8.49 The Proposed Development is expected to create jobs during its operational life which will mean that there is a long-term minor increase in the amount of money being spent within the local area across services of all types. It is likely that some local businesses will see a minor increase in the amount of income as a result.
- 13.8.50 Whilst a detailed economic impact assessment has not been commissioned for this Proposed Development, based on professional judgement and experience of the delivery of wind projects across Wales, it has been estimated that an Energy Park of this size will generate up to an additional £522,000 direct GVA annually across Wales, including up to £96,000 in the local area during the operational phase, when applying the appropriate GVA measures (DNS/ 3255801: Mynydd Fforch Dwm Wind Farm , 2023).
- 13.8.51 Investment in certain sectors results in direct effects on others in an interconnected economy. This can lead to changes in production, sourcing, and distribution practices, influencing the entire supply chain ecosystem. As such, it can be anticipated that investment will be retained locally and regionally, both within and outside the energy sector.
- 13.8.52 The value (sensitivity) of the receptor is therefore considered to be **low** at both scales. The magnitude of impact (change) in terms of GVA is considered to be **major** at both scales. Therefore, there is likely to be a **slight beneficial** effect on operational industry GVA at both scales during the operational phase, which is considered to be **not significant**.

Decommissioning

- 13.8.53 As decommissioning is likely to constitute a reversal of the activities undertaken during the construction phase, it is considered that the likely residual effects on recreation and tourism would be the same or less, and following this the Site would be returned to a state similar to its current condition.
- 13.8.54 In relation to employment and economic effects, there is still an absence of reliable data regarding the likely decommissioning expenditure involved in the future to be able to assess residual effects quantitatively.

13.9 Opportunities for Environmental Enhancement

- 13.9.1 A financial contribution for enhancements of the on-site PRowS, to include signage and improved access gates, will be agreed between the Applicant and NPTC and BCBC prior to implementation and secured as a planning obligation (Section 106).

13.10 Difficulties and Uncertainties

- 13.10.1 This assessment has used third party data and statistics, some of which are subject to regular update. However, the Applicant considers that the data and statistics used in this assessment present a robust reflection of the existing baseline conditions. Any changes that may have occurred between the time data

and statistics were collected and the submission of the DNS Application are not considered to have adversely affected the Applicant's ability to undertake the assessment, nor indeed its conclusions.

- 13.10.2 There are no standard technical significance criteria relating to the assessment of socio-economic effects. The assessment has been made against a benchmark of current socio-economic baseline conditions prevailing at, within, or around the appropriate spatial study area for each effect. However, professional judgement and experience of similar schemes has been employed when conducting this assessment and therefore this difficulty has not adversely affected the Applicant's ability to undertake the assessment, nor its conclusions.
- 13.10.3 As with any dataset, baseline data will always change over time. The most recent published data sources have been used in this assessment; however, it should be noted that in some instances this data may be older than the true baseline. This is an unavoidable limitation that is not considered to adversely impact the validity of the assessment undertaken to identify the likely significant socio-economic effects.

13.11 Inter-Project Cumulative Effects

- 13.11.1 The inter-project cumulative effects assessment has been undertaken as detailed in **ES Volume II, Chapter 4: Approach to the EIA** of this ES. For the cumulative assessment, consideration has been given to committed wind developments within 20 km of the application Site and other development within 10 km of the Site. The Zone of Influence (Zoi) has been determined as appropriate for this cumulative assessment as it reflects the distance up to which there is potential for significant theoretical visibility of the Proposed Development. Potential impacts to socio-economic receptors such as businesses and tourism are most likely to be influenced by visual change.
- 13.11.2 **ES Volume II, Chapter 8: Landscape and Visual** sets out the developments that have been considered to have potential for cumulative landscape or visual effects when combined with the Proposed Development. However, while there is a requirement for the assessment reported in **ES Volume II, Chapter 8: Landscape and Visual** to consider existing and approved developments, this assessment has considered the effects of existing developments within the baseline scenario and are not reassessed within this inter-project cumulative effect assessment.
- 13.11.3 **Table 13.16** presents the developments considered within this inter-project cumulative assessment.

Table 13.16 Relevant Cumulative Developments within 20 km of the Proposed Development

Site	Distance and from Site
Foel Trawsant Wind Farm Connection	0.32 km
WEPA Vesta (Paper Machine)	0.12 km
Prosiect Egni Glan Llynfi (Modular Nuclear)	0.8 km
Eirlys Solar Farm	0.92 km

Site	Distance and from Site
Y Bryn (including battery storage)	1.8 km
HyBont Green Hydrogen	2.55 km
Y Bryn Wind Farm Grid Connection	3.7 km
Great Western Avenue, Coity Road Battery energy Storage	4.15 km
Ty'n Y Waun Solar	4.69 km
Metal Processing Facility - Land West of Junction 38 M4	4.83 km
Cefn Gwrgan Road	5.86 km
Foel Trawsnant	6.0 km
Upper Ogmore Grid Connection	6.0 km
Upper Ogmore (including battery storage)	6.7 km
Mynydd Y Gaer Wind Farm	6.7 km
Pant y Wal Extension	8.05 km
Dyfed Reinforcements Riverside Road	8.77 km
Taff Ely (repowering)	9 km
Mynydd Fforch-Dwm	10.83 km
Melin Court	12.87 km
Afon Ddaw Solar and Energy Storage Project	13.61 km
Abergorki	14.75 km
Mynydd y Glyn	15.72 km
Llanwonno Energy	17.45 km
Hirfynydd Renewable Energy Park	18.82 km

Assessment

- 13.11.4 During construction, there may be some temporary, short-term beneficial impacts to employment and GVA due to a greater provision of jobs in the area created by all these wind farms. However, given the temporary nature of construction jobs the cumulative effect on employment and GVA is anticipated to be **not significant**.
- 13.11.5 The Proposed Development and other developments are expected to create jobs during their operational life. However, given the relatively small number of direct operational jobs available as a result of the Proposed Development, the cumulative effect on employment and GVA is anticipated to be **not significant**.
- 13.11.6 The Proposed Development is **not anticipated to result in significant effects** to walkers, cyclists and horse riders via impacts on PRow. Therefore, the Proposed

Development will not contribute to any significant cumulative effects to PRoW within the study area.

- 13.11.7 As detailed in **Section 13.6**, there is little evidence that renewable energy developments have any long-term detrimental impacts on tourism. Therefore, it is anticipated that the Proposed Development and the identified committed developments **will not contribute to any significant cumulative effects** on tourism.
- 13.11.8 Due to the nature of the businesses within the study area only those which are camping and holiday rental businesses and therefore are more closely associated with impacts to visual amenity and landscape character, are considered to have the potential to experience cumulative impacts. However, as set out in **Section 13.8** above, research has shown that the presence of wind farms has limited impacts on people's choice of holiday accommodation and the tourism economy. Therefore, the Proposed Development **will not contribute to any significant cumulative effects** to businesses within the study area.

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