

LDP2 **Ceredigion**

**Replacement Local Development Plan
2018 - 2033**

**Topic Paper: Rural Economy and Employment
Update for Preferred Strategy 2019**



Cyngor Sir
CEREDIGION
County Council

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Note for Reader

The update Topic and Background Papers for the Local Development Plan (LDP) Deposit were published at the same time (December 2010) and are still available on the Council website or in paper copy by request.

The purpose of this Background Paper Update is predominantly to demonstrate whether, since the Deposit of the LDP was published and subsequently the LDP adopted in April 2013, there has been any change in; relevant guidance, policies or strategies; information and evidence; or issues highlighted through the Annual Monitoring Report (AMR) or appeals; that suggests the issues addressed in the adopted LDP have changed or are not fully being addressed by the policies.

Each paper will provide a summary table of any issues raised since the Deposit and whether these trigger the need for further investigation as to whether a change is required as part of the LDP review, or further explanation as to why a change is not required. If there is further discussion required this will be incorporated within the update paper.

1. Executive Summary

1.1.1 This Topic Paper outlines the main policies and guidance that have been released since the last Economy Topic Paper and what material impact they have on the policies in the LDP.

1.1.2 What this has demonstrated is that the main change to the rural economy of Ceredigion is the emerging plans of the Growing Mid Wales (GMW) framework and how these early plans need to be accounted for in the plan and evidence base but as yet the policies can only be made flexible and permissive (which we have established the existing ones are) as no allocations are ready on these strategies.

2. Introduction

2.1.1 The Rural Economy and Employment Topic Paper (December 2011) considered the role retail, agriculture, tourism and other associated economic activities has to play in Ceredigion in terms of known current economic needs, current employment elements in place and opportunities that exist for economic development.

2.1.2 This information was then used to determine the key issues which could be addressed by the LDP, strategy objectives and finally in the development of policies.

2.2 Role of this paper

2.2.1 This paper looks at what has changed since the previous Update Topic Paper was released and whether a more detailed update is required to discuss any issues raised. If so the more detailed update will be incorporated within this paper.

3. Update table

3.1.1 The table below provides a summary of changes that have occurred or issues that have been raised in relation to Rural Economy and Employment. These may be from changes in/new Policies, Strategies etc., changes in/new evidence or information or issues raised in the AMR or appeals.

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
New economic development strategy for Wales released in 2010 - Economic Renewal: a new direction.	Welsh Government - Economic Renewal: a new direction	2010	No Further policy consideration required	New approach to economic development is outlined and considerations for review of planning policy with regards to economic development. See changes implemented through PPW and TAN 23.	No
TAN 6 Practice Guidance Note released.	Rural Enterprise Dwellings - Technical Advice Note 6 Planning for Sustainable	Dec 2011	No Further policy consideration required	The objective of this guide is to assist applicants for planning permission and local planning authorities to understand and interpret this particular aspect of the	No

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
	Rural Communities			rural housing policy.	
The latest regeneration framework set out by the Welsh Government - Vibrant and Viable Places	Vibrant and Viable Places	2013	No Further policy consideration required	The strategy outlines a number of national outcomes to achieve its aims and considers three key principles for regeneration. All of which have been accounted for in the existing LDP strategy and enacted through the amended PPW and TAN 23	No
TAN 23 Economic Development was developed and released, along with a Planning Policy Wales 10 Update	Technical Advice Note 23	2013	Further investigation required	These updates are to make sure that the planning system facilitates economic renewal in Wales in the current economic climate to the best they can. The development of a new TAN23 is significant for future economic development planning applications. The new TAN 23	Yes

Review Issue / Proposed Change	Source / Trigger	Date (Month/Year)	Action	Further comments	Review Topic Paper Required?
				requires local authority undertake Employment Land Review's and forecast future requirements. A new methodology has been proposed for undertaking the work.	
In July 2013, a task and finish group was set up by the Welsh Government to consider the possibility of a Local Growth Zone (LGZ) in the Teifi Valley. In Nov 2014, a further group was created to oversee the implementation of recommendations.	Teifi Valley Local Growth Zone	July 2013	No Further investigation required	The task group was set up to assess policy options to provide support in the Teifi Valley with regards to the economy and jobs. 26 recommendations were considered. Recommendation 23 is important as it outlines the need for further monitoring with regards to making sure that the LDP and policies are in line with the LGZ Report. The Teifi Valley Group was disbanded in 2016 following limited progress of a Local	No

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
				Growth Zone.	
Single Integrated Plan for Ceredigion was released – which presents an agreed vision for the County.	Ceredigion for All: Single Integrated Plan (SIP)	2013	No Further Investigation is Required	‘Ceredigion for All’ – the Single Integrated Plan sets out the key issues and actions that the Council and partner organisations will be working together to deliver over the next four years, 2013 – 2017. The aims and principles of the plan are in line with the strategy of the Ceredigion LDP.	No
Growing Mid Wales Partnership was formed to establish more regional strategies	Growing Mid Wales Partnership (2015)	2015	Further Investigation Required	Growing Mid Wales is a regional partnership and engagement arrangement between the private and public sectors, and with Welsh Government. The initiative seeks to present the region’s interests and priorities for improvements to our	Yes

Review Issue / Proposed Change	Source / Trigger	Date (Month/Year)	Action	Further comments	Review Topic Paper Required?
				local economy. Research projects have been undertaken to produce evidence based reports on the strategic economic priorities in the Mid Wales Region. These are discussed in the relevant sections below – but whilst ambitious are at any early stage of conception and therefore no formal allocations can be made.	
Latest transport policy has been released in the form of the Mid Wales Join Local Transport Plan 2015	TraCC the Mid Wales Join Local Transport Plan 2015	Jan 2015	Further policy consideration required	This plan looks to cover a detailed programme of framework and schemes with regards to Transport in Mid Wales for the next 5 years and beyond.	Yes
Wales Rural Development	Welsh Government Rural	May 2015	No change	Objective set out within this programme are in line with	No

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
Programme 2014 – 2020 document released	Communities Wales Rural Development Programme 2014 – 2020 (2015)			Ceredigion's LDP.	
Ceredigion Council adopted its new Regeneration Strategy in June 2015.	Ceredigion for All: Our Livelihoods, Our Economic Regeneration Strategy 2014-2020	June 2015	No change	The aim of the Strategy is to address some of the key challenges evident within the county. It does not currently create a need to amend the LDP itself.	No
Practice Guidance released for Building and Economic Development Evidence Base to Support LDP.	Building and Economic Development Evidence Base to Support LDP	August 2015	No Change	This provides advice on how to build an evidence base with regards to employment and economy.	No

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
Update to TAN 4	Welsh Government Technical Advice Note 4: Retail Centre Development (2016)	November 2016	No change	The update is broadly in line with the adopted LDP. As no policies were created specifically relating to B1, B2 and B8 uses as a result of this specific TAN. Implications of this TAN are therefore discussed in more detail in Topic Update Paper: Retail.	No
Green Growth is becoming a new focus in the Welsh Government and could be something to consider with regards rural economy. New document release for consultation.	Green Growth Wales: Investing in the Future	Nov 2015	Further policy consideration required	Sustainable use of our natural resources can create a new economic model that will deliver wealth creation and economic growth both today and in to the future.	Yes
Ceredigion Economic	Ceredigion	2015	New	An internal employment land review	Not at this

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
Needs Assessment 2008; 2009; 2010 is out of date and will need to be renewed	Economic Needs Assessment (and revisions) 2008; 2009; 2010		assessment to take place	has been undertaken and the Council are working with regional partners on a larger than local employment needs assessment which investigates the reasons for the lack of uptake of some employment allocations and considers what the demand is for the future allocations in new evidence.	stage
New Sustainability Appraisal coming 2019	Sustainability Appraisal	2019	New SA to take place	The Sustainability Appraisal Report contains a list of potential indicators that may be used to monitor the success of the LDP policies. They largely relate to the overall economic function of the county (once refined) these will need to be updated and	Not at this stage

Review Issue / Proposed Change	Source / Trigger	Date (Month/ Year)	Action	Further comments	Review Topic Paper Required?
				reviewed.	
The latest AMR indicators conclude that the targets are currently being met and there are no concerns over the implementation of the policies	Local Development Plan Annual Monitoring Report 2018	October 2018	No change	AMRE01-04 and AMRQ02 all conclude that there are currently no concerns about the implementation of the LDP's policies.	No
An update of Planning Policy Wales has been published	Planning Policy Wales Edition 10	December 2018		There is a focus on Productive and Enterprising Places that discusses the economic concepts of placemaking. There is a focus on increasing the economic activity across all sectors and scales to create a Prosperous Wales.	

3.2 Conclusion

- 3.2.1 As noted in the table above, changes in policy/guidance/evidence/issues have resulted in the need for more detailed discussion with regards to this topic paper.
- 3.2.2 New national policy should be taken into account when considered in line with the LDP policies.
- 3.2.3 It is advised that a further update of this topic papers occurs once the Economic Needs Assessments have been completed

4. Local Context

4.1 Background

- 4.1.1 The Topic Papers written at Preferred Strategy and Deposit set out more detail in relation to the rural economy within the County. That detail remains relevant and is not therefore repeated here. However, the following section summarises how information in the 2010 paper has influenced the content and production of the LDP.
- 4.1.2 From the evidence base, a number of issues were identified that may be able to be addressed, at least in part, by the LDP. These were (Note: Further issues and description can be found in the 2011 topic paper):
- a. Sufficient opportunity is needed for the County's economy to grow as this will assist in retaining young people. This in turn should assist the language as this is the age group that will have benefited from compulsory Welsh language education. Sufficient accessible housing and community facilities also have a role to play.
 - b. Rural poverty' is a big issue, with incomes being considerably less in rural areas than in urban areas. The needs of the rural area will need to be met flexibly if rural areas are to be sustained.
 - c. The County has high levels of home working coupled with a high degree of long distance commuting. There are also high levels of self-employment and part time working within the county. An aging population will influence the level and type of workforce available in Ceredigion.
 - d. Good ICT is critical in order to maximize the productivity of the workforce given the characteristics of the population and the Rurality of the County
 - e. Public services, education, tourism, leisure and agriculture dominate the employment structure within the County. Many of these employment generators cannot be accommodated on business or employment sites
 - f. In terms of uses that should be encouraged to locate on business or employment sites future growth is likely to be fuelled by indigenous

business growth and medium to small scale inward investment projects with a requirement for prestige or high quality sites. The portfolio of sites should offer a range of types of sites.

4.1.3 These issues were researched and then drawn into the Key Issues and Objectives, and then addressed where possible, within LDP Policies. No proposed changes have been made to the rural economy key issues in LDP 2

4.2 Current Position

4.2.1 The LDP was adopted in April 2013 and the first review was completed in 2017. This identified a range of issues that needed addressing in the writing of the replacement plan – that were mainly concerned with the strategy. Other than ensuring the work of Growing Mid Wales was fully captured in LDP 2 no other rural economy issues were identified as not adequately addressed in the existing policies.

4.2.2 There have been five Annual Monitoring Reports (AMRs) produced which monitor the effectiveness of the LDP against what was said it would do. 5 targets have been incorporated that monitor the effectiveness of the economy (and others) policies

Indicator	Conclusion
AMRE01	The target is currently being met and there are no concerns over the implementation of the policies.
AMRE02	The 2018 target has not been achieved however there are no concerns over the implementation of the policies. The LDP review will consider the updated Economic evidence base currently being prepared which is considering future employment land needs and reviewing employment allocations.
AMRE03	The amount of allocated employment land is sufficient to cover the plan period. The targets are currently being met

	and there are no concerns over the implementation of the policies.
AMRE04	The indicator is being met. There are currently no concerns about the implementation of the LDPs policies.
AMRQ02	Residential and Economic Permissions targets are being met. Other Development permissions have exceeded the target. Notwithstanding, an analysis of the other developments suggests that they are appropriate in scale and in their given locations and therefore there are currently no concerns about the implementation of the LDP's policies.
Sustainability Objective 8a	Whilst there has been a notable drop in numbers for staying visitors this does not appear to be Ceredigion specific. The suite of tourism policies in the LDP are considered to support the objective and the LDP continues to promote, develop and improve opportunities for sustainable and environmentally friendly tourism, leisure and recreation facilities within Ceredigion.
Sustainability Objective 9a	There are no concerns over the LDP Strategy and policy in relation to the objective.
Sustainability Objective 12a	There are indications of a mixed picture regarding growth in the economy and job market within Ceredigion. However, it is too early to tell whether or not this is a long term trend and whether or not it is in any way causally linked to the implementation of LDP. Despite these uncertainties, there is no evidence to suggest that the LDP is having a negative effect on the local economy and therefore, within the context of the SA/SEA, the overall effect of the LDP does not raise any concerns at the present time.

5. Review Issues (Triggers)

5.1.1 Table 1 in Section 3 summaries the analysis of the AMR, new/updated legislation/guidance/policy and new/updated evidence. Where issues have

been highlighted, more information is provided below. Note: All strategy/guidance/policy changes have been outlined in this section.

AMR Indicators

- 5.1.2 The 2018 ARM indicates that there are currently no issues with regards to LDP policy and economic development. The Economy and Retail Targets are predominantly being achieved and there are no significant concerns of the implementation of these policies.
- 5.1.3 AMRE01 – A gross gain of 1.7ha of B1, B2 and B8 class development was permitted during the monitoring period. This figures compares to +0.57ha (2017), +0.14ha (2016), +1.94ha (2015) and +0.14ha (2014). Employment gains (+1.7ha) relates to 6 planning applications in various urban and rural locations across the county. This target is currently being met and there are no concerns over the implementation of the policies. .
- 5.1.4 AMRE02 – The target of 83% of allocated sites should be permitted or completed by 2018 has not been achieved with only 75.3% (permitted) and 58.1% (completed). It is noted that in 2018 no permissions were granted on Employment Allocations and although there were completions on allocated sites they were not on previously undeveloped parts of the site. It is noted that most of the completions recorded were completed prior to adoption of the LDP as many of the LDP's employment allocations have been identified in order to allow for the co-ordinated redevelopment and/or rationalisation of their existing uses. Whilst the identified target for 2018 has not been met there are no concerns over the level of employment development in general which in recent years has experienced a general slowdown in the economy which supports a likely reduced overall requirement for employment land.
- 5.1.5 AMRE03 - According to Ceredigion's economic needs assessment (DTZ, 2010); around 63% of the jobs projected to be created over the LDP period do not require an allocated employment site to operate. Consequently, it is expected that a high proportion of economic development will take place at off-site locations. However, for both permissions and completions, all targets for this indicator have been met, indicating that at present the LDP's

allocated sites are operating as desired. An update of the economic needs assessment is considering the amount of employment land likely to be needed in the future. The targets are currently being met and there are no concerns over the implementation of the policies as the amount of allocated employment land is sufficient to cover the plan period.

- 5.1.6 AMRE04 – Being a rural county with little brownfield land available for development, greenfield land will inevitably contribute towards a high proportion of total developable land. More than 30% of all economic development permitted and completed has been on brownfield land since the start of the LDP process with 58% permitted (9.61ha) and 43% (5.1ha) completed. The target has therefore been met and there are no concerns about the implementation of the LDP policies.
- 5.1.7 An analysis of relevant planning applications indicates that the cause for this failure is the lack of delivery in relation to the outline permission for the Capel Bangor Business Park (A031074), which is allocated in the LDP as E0305. The planning consent has now expired. The LPA has not received a new planning application prior to the permission expiring, therefore this allocation's inclusion within the plan will be re-considered on grounds of deliverability. However, the Capel Bangor Business Park is one of Ceredigion's largest employment sites and its existence is important in facilitating Ceredigion's economic growth. This site was identified as the only suitable location for a business park of this nature and its benefits have therefore been deemed to outweigh the loss of greenfield land. Work on the larger than local employment study across the Growing Mid Wales region will consider this issue in detail and recommendations will be made accordingly.
- 5.1.8 Consequently, it is considered that although the indicator's target is not being met in full with regard to permitted development, the reasons are clear and further dialogue will be instigated during the year to consider future deliverability of Capel Bangor. Therefore there are no concerns over the implementation of the policy as yet.

- 5.1.9 AMRQ02 - Being a rural county with little brownfield land available for development, greenfield land will inevitably contribute towards a high proportion of total developable land and the indicator's targets were designed to reflect this.
- 5.1.10 The 75% threshold set for residential development has not been met for development permitted, or development completed, with 81% of permissions and completions being located on greenfield land. The difficulty with this indicator is that the LA has no control over the planning permissions once granted. Many of those permissions now being completed would have been granted prior to adoption of the LDP and therefore prior to the LPA being able to influence the location of development in favour of brownfield sites.
- 5.1.11 The targets for economic development permissions have been met, with 24% of development permitted however 46% of economic development was completed, on greenfield land. To counter this, the target for other types of development has been exceeded. This is due to a few significant applications including a retail and community development in Cardigan and three school developments. Such developments, by their nature, are unusual events and therefore they are not considered to represent a threat to long term achievement of the LDP's objectives.
- 5.1.12 The target for other development has been exceeded but given the community/economic benefit realised in relation to 'other development' it is not considered cause for concern.
- 5.1.13 In summary, the majority of targets identified for this indicator are being met. Those development targets not being met are not considered cause for concern.

Sustainability Objective 8a Promote, develop and improve opportunities for sustainable and environmentally friendly tourism, leisure and recreation facilities within Ceredigion

5.1.14 For detailed consideration of tourism please see the tourism topic paper 2019, but in brief:

5.1.15 There has been no significant changes in total visitor numbers or visitor types in recent years and a slight increase in the economic impact of tourism is evident. The levels of visitor numbers both staying and non-staying have fluctuated marginally over the past 10 years but have consistently been around the figures presented below. However, the levels of economic benefit of tourist visits continues to steadily increase.

5.1.16 The latest information is for the 2016 calendar year and is the latest information available:

1,231,000 Total Staying Visitor including:

- 202,970 persons staying in Serviced Accommodation
- 913,210 persons staying in Non-Serviced Accommodation
- 115,280 persons staying with Friends or Relatives
- 1.48 million day visitors.

5.1.17 Whilst there has been a notable drop in numbers for staying visitors this does not appear to be Ceredigion specific. The suite of tourism policies in the LDP are considered (with the minor changes proposed in the tourism topic paper) to support the objective and the LDP continues to promote, develop and improve opportunities for sustainable and environmentally friendly tourism, leisure and recreation facilities within Ceredigion.

Sustainability Objective 9a Increase opportunities to build the Ceredigion education and skills base

5.1.18 The LDP strategy continues to promote growth in sustainable locations. Changes due to schools modernisation will be factors into the LDP Review.

5.1.19 In Ceredigion the numbers achieving NVQ qualifications has decreased for all NVQ and other qualifications and a slight increase in no qualifications has

been realised. When comparing Ceredigion to the Wales averages the Ceredigion population have higher levels of NVQ Qualifications and lower levels of Other Qualifications. Further, only 7.6% of the Ceredigion population have no qualifications compared to the Wales average of 8.7%.

5.1.20 There are no concerns over the LDP Strategy and policy in relation to the objective.

Sustainability Objective 12a Encourage a vibrant and diversified economy

5.1.21 While the economic recessions caused the numbers in employment to drop from 69.6% in 2010 to 61.3% in 2011/2012, since then there has been a steady rise in numbers in employment. This monitoring period shows an increase in the proportion of economically active persons in employment from 69% (2016) to 69.7 (2017). The proportion of economically active persons in employment may seem low, being lower than the Wales (76%) and UK (78.4%) average but Ceredigion has a relatively high student population, which contributed to a significant percentage of those individuals not in employment.

5.1.22 Gross weekly pay for full time employees has not varied significantly since the LDP was adopted. Further, given that the Ceredigion figures are derived from survey data for a small area, the year on year change may be more the result sample variability than evidence of an actual change in income. Notwithstanding, wages in Ceredigion continue to be lower than the Welsh and UK averages and the assumed growth is also below the average annual rate of inflation for this period.

5.1.23 In relation to the development of the LDP's allocated employment sites, 49% of their area is now committed for development and 52% of the units have been completed. Most of the completions recorded were completed prior to the adoption of the LDP as many of the LDP's employment allocations have been identified in order to allow for the co-ordinated redevelopment and/or rationalisation of their existing uses. This is a satisfactory situation at this point in the Plan period.

- 5.1.24 Shop vacancy rates are highly variable between Town Centres. The average shop vacancy rate within Ceredigion's Town centres is 14.9%. This figure compares to 13.6% (2017), 7.6% (2016), 9.1% (2015) and 11.9% (2014). This is on a par with the UK vacancy average, which according to the Local Data Company (was 12.3% in June 2015). Therefore, with the exception of Llandysul (28.6%) and Tregaron (21.4%) all town centres are performing better than the national average and overall, the situation is an optimistic one, particularly as Aberystwyth, which is by far Ceredigion's largest shopping centre, has a vacancy rate of just 9.9%.
- 5.1.25 Ceredigion's Primary and Secondary retail frontages, which exist only in Aberystwyth and Cardigan, also offer a varied picture. See Retail Topic Paper 2018 for further information. But in brief in Aberystwyth Primary Frontages, the proportion of retail uses varies from between 88.9% to 42.9%; while it's Secondary Frontages vary between 76.9% and 26.7%. In Cardigan Primary Frontages, the proportion of retail is 76% in both of the primary retail frontage areas while it's Secondary Frontages vary between 90.9% and 28.6%.
- 5.1.26 It should also be noted that the indicator monitors the performance of A1 uses only. Policy LU21 defines retail as A class and not A1 specifically and the policy is applied as such. If you were to consider A class use (and not only A1) all Primary and Secondary retail frontages in both Aberystwyth and Cardigan could be well in excess of the 75% and 50% requirement.
- 5.1.27 When considering A class uses (including A1, A2 and A3), primary frontages in Aberystwyth range from 80-100% (combined 91.4%) and in Cardigan 95.8-100% (98% combined) and secondary frontages in Aberystwyth range from 80-100% (combined 89.2%) and in Cardigan range from 71.4-100% (combined 89.3%). This picture indicates that all frontages are all exceeding required policy targets.
- 5.1.28 Footfall surveys have been conducted in Aberystwyth annually since 2012. It is noted that not all locations were recorded this year and last year, however, of the locations that were recorded and totals of footfall remain similar to

previous years. The total footfall recorded in 2017 (12,351), was positive, (especially as the clock tower locations were only monitored for half the time than usual due to lack of surveyors), being higher than that recorded in 2016 (10,144) and 2015 (9886). Notwithstanding this positive result, given the relatively short period over which the survey has been conducted, it is not possible to draw any major conclusions to date. It was expected that the opening of both Tesco Super Store and Marks and Spencers (the Mill Street Development) has the potential to impact on footfall patterns in Aberystwyth and the significant increase in footfall measures across the town appears to bear this out.

- 5.1.29 There are indications of a mixed picture regarding growth in the economy and job market within Ceredigion. However, it is too early to tell whether or not this is a long terms trend and whether or not it is in any way causally linked to the implementation of LDP. Despite these uncertainties, there is no evidence to suggest that the LDP is having a negative effect on the local economy and therefore, within the context of the SA/SEA, the overall effect of the LDP does not raise any concerns at the present time.

5.2 Changes to / New Policy / Legislation

- 5.2.1 Since the LDP went to deposit the following legislation/policy/guidance has been released or updated.

Legislation Changes

Well-being and Future Generations (Wales) Act 2015

- 5.2.2 This Act now requires that all projects, policies and plans consider the four pillars of sustainability – the social, economic, environmental and cultural well-being of Wales.
- 5.2.3 This Act looks at the long-term goals and makes public bodies recognise the importance of working together with people and communities, along with each other to create a more joined-up approach and limit problems. It puts in place the ‘sustainable development principle’ that considers that: “the body must act in a manner which seeks to ensure that the needs of the present

are met without compromising the ability of future generations to meet their own needs.”

5.2.4 There are seven well-being goals established:

- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities
- A Wales of vibrant culture and thriving Welsh Language
- A globally responsible Wales

5.2.5 This reinforces the policies within the LDP and doesn't at this stage require any changes to the LDP.

National Policy

Economic Renewal: a new direction (2010)

5.2.6 This is the latest economic strategy that sets out to make Wales "one of the best places in the world to live and to work". It replaced the *Wales: A Vibrant Economy* policy document published in 2005.

5.2.7 There are five key priorities outlined within the strategy:

- Investing in high-quality and sustainable infrastructure
- Making Wales a more attractive place to do business
- Broadening and deepening the skills base
- Encouraging innovation
- Targeting the business support we offer

5.2.8 This strategy also set out to review planning policy for economic development to ensure the success of economic development with regards to PPW.

TAN 6: Practice Guidance Note (2011)

5.2.9 This Practice Guide provides further information about TAN 6. The objective of this guide is to assist applicants for planning permission and local planning authorities to understand and interpret this particular aspect of the rural housing policy.

5.2.10 Key points and changes raised by the guidance note include:

- There is a longstanding policy of general restraint on sporadic development in the countryside.
- Exceptions to the restraint policy to meet particular needs have been extended from farming and forestry to a wider range of rural enterprises as part of a comprehensive policy to deliver a supply of affordable housing commensurate with identified needs.
- New rural enterprise dwellings remain exceptions to general policy and require particular justification. The testing of essential functional needs and economic sustainability remains the basis of the exception.
- In parallel with the wider scope of the policy exception, there is an extension of the control measures over the future occupation of permitted dwellings to secure them for the continued benefit of the rural community.

Vibrant and Viable Places (2013)

5.2.11 Vibrant and Viable Places is the latest regeneration framework set out by the Welsh Government. The vision is that: “everybody in Wales should live in well-connected vibrant, viable and sustainable communities with a strong local economy and good quality of life.”

5.2.12 The strategy outlines a number of national outcomes to achieve its aims, including:

- improved levels of economic activity and more jobs;
- strong and diverse local economies with private, public and third sectors working together;
- well-connected communities supported by transport and broadband connections;
- sustainable use of the natural environment for local energy and food production;
- a thriving private sector and social enterprise;
- successful town centres and coastal communities; and

- a well-managed historic and natural environment contributing to the distinctiveness of Wales' landscape and settlements with heritage and historic character conserved, valued and sustained.

5.2.13 Additionally, there are three key principles for regeneration.

- Partnership, involving effective communication and joint working between and across all sectors, which embraces good practice, equality and innovation;
- Strategy, underpinned by evidence-based programmes and combining dynamic leadership with robust governance, including monitoring and evaluation, to ensure value for money; and
- Sustainable development, the Welsh Government's central organising principle, enabling long-term investment through locally conceived and delivered projects, within a shared overarching strategy.

5.2.14 Three key urgent priorities for targeted investment: Town centres serving 21st Century towns, Coastal communities and Communities First clusters.

5.2.15 The strategy considers retail directly in the section titled "Town centres serving 21st Century towns". The strategy considers that we need to support our town centres to explore and discover a different future, an alternative future. Considering that:

- The next 10 years will be about the diversification of our high streets and standing up and making tough decisions.
- It will also be about the reinforcement of what makes them special.
- Our towns will no longer be able to depend on retail alone; we need to develop our towns into destinations for living, for working and for leisure.
- Our towns need to respond strongly to the challenges. We can no longer see the Internet as a threat. It needs to be considered as an opportunity, to embrace and exploit.
- Our towns need to discover a niche, unique selling points, a reason for people to visit.

- This will include a more diverse and vibrant night-time economy, and ensuring that services, such as health and education, are increasingly delivered from within town centres.

5.2.16 Finally, part of the Vibrant and Viable Places framework's support for town centres includes a £5m Town Centre Loans Fund to aims to help support town centre regeneration across four local authorities, including Ceredigion, Pembrokeshire, Powys and Monmouthshire – with each receiving a loan of £1.25m. This loan fund was used to acquire the Arriva depot site, which has since been packaged with adjoining council land and marketed as a development opportunity. Further funding being used for future town centre projects – to be determined / revealed.

Technical Advice Note (TAN) 23 Economic Development and Planning Policy Wales Chapter 7 Update (2014)

5.2.17 TAN 23 provides advice on the national planning policy on economic development set out in Planning Policy Wales (PPW). The TAN provides guidance for local planning authorities on:

- developing high level economic planning objectives
- assessing the economic benefits of new development
- economic development and the rural economy
- preparing an evidence base for a Local Development Plan
- creating an economic development vision for a Local Development Plan
- determining employment land supply.

5.2.18 The economic benefits associated with development may be geographically spread out far beyond the area where the development is located. As a consequence it is essential that the planning system recognises, and gives due weight to, the economic benefits associated with new development.

5.2.19 PPW advises that planning for economic land uses should aim to provide the land that the market requires, unless there are good reasons to the contrary. Where markets work well, this will help maximise economic efficiency and growth.

- 5.2.20 Market failures can result in situations where market forces undermine environmental and social objectives to an unacceptable degree. The planning system should work to correct or mitigate these failures.
- 5.2.21 Such instances can be widespread and PPW highlights corrections in many places. Among other things, the policy advises that planning should guide development so that it benefits disadvantaged communities, concentrates people-intensive activities in town centres and aligns jobs with housing and infrastructure. Market forces on their own do not necessarily deliver these sustainable objectives.
- 5.2.22 Further information, including planning considerations can be found in the TAN.

Wales Rural Development Programme 2014 – 2020 (2015)

- 5.2.23 The Welsh Government Rural Communities – Rural Development Programme 2014-2020 was adopted by the European Commission on Tuesday 26th May 2015.
- 5.2.24 It is a 7 year investment programme, which aims to improve resilience and promote transformational change in agriculture, forestry and rural communities. Bringing nearly a billion pounds to rural Wales, it will support a wide range of activities which:
- improve competitiveness in the agriculture and forestry sector
 - safeguard and enhance the rural environment
 - foster competitive and sustainable rural businesses and thriving rural communities.
- 5.2.25 There are six Rural Development Priorities and this framework is in line with these:
- fostering knowledge transfer and innovation in agriculture, forestry, and rural areas
 - enhancing competitiveness of all types of agriculture and enhancing farm viability

- promoting food chain organisation and risk management in agriculture
- restoring, preserving and enhancing ecosystems dependent on agriculture and forestry
- promoting resource efficiency and supporting the shift towards a low carbon and climate resilient economy in agriculture, food and forestry sectors
- promoting social inclusion, poverty reduction and economic development in rural areas.

Planning Policy Wales Edition 10

5.2.26 The Welsh Government (WG) has published Edition 10 of Planning Policy Wales (PPW).

5.2.27 *PPW 10 states that policies should encourage a diversity of uses in centres. There is a large emphasis on vibrant and viable centres. In order to achieve these, they should be distinguished by a diversity of activity and uses which should contribute towards a centres well-being and success, whilst also reducing the need to travel. LDP policies should include policies describing the types of use that are likely to be acceptable in primary and secondary areas. In order to achieve a diversity of uses and activities, a flexible planning approach may be required.*

5.2.28 The Ceredigion LDP is broadly in line with what is proposed therefore, whilst no major changes are required to comply with these revised policies, at such time of the preferred strategy of the LDP, changes will be required from the retail policies in order to reflect the changes proposed in the Retail topic paper which set out the redundancy of primary and secondary frontages in a Ceredigion context.

5.2.29 The proposed amendments should allow greater flexibility in the retail centres and provide local planning authorities with the necessary tools to accept and reject applications in accordance with what is best for the vitality, viability and vibrancy of their retail centres.

Regional Policy

Mid Wales Joint Local Transport Plan (2015)

5.2.30 The Plan aims to address the key issues and opportunities for Mid Wales:

- Difficulties in gaining access to employment and services, particularly for those without a car and because of the need to travel long distances;
- Poor opportunities for passing, pinch point and constraints on the strategic road network lead to increased journey times and reduced journey time reliability for the movement of people and goods within the region and to key destinations outside of Mid Wales
- Increased risks to the resilience of the network through impacts of climate change, including flood risk
- Opportunities to increase mode share by active travel modes and to improve the health and well-being of the local community and to continue to improve the road safety record

5.2.31 The plan looks to develop a transport framework for mid wales, with a detailed programme of schemes until 2030, and a number of aims, including:

- improve access to key destinations and markets,
- enhance access to employment and services,
- improve health and well-being by increasing levels of walking and cycling,
- bring improved safety and security and at the same time bring benefits and minimised impacts on the environment.

5.2.32 It should be noted that the funding situation is constrained and therefore the vision for the plan is limited to what investment does become available.

Teifi Valley Local Growth Zone (2015)

5.2.33 The Teifi Valle Local Growth Zone has been set up as an alternative model to Enterprise Zones for rural communities. A task and finish group has been assigned to consider recommendations for action, with a subsequent group set up in November 2014 to oversee the implementation of the LGZ.

5.2.34 Within the original report, 26 recommendations were considered and outlined. Recommendation 23 is important as it outlines the need for further monitoring with regards to making sure that the LDP and policies are in line with the LGZ Report. This can be achieved through the Annual Monitoring Report.

5.2.35 The task and finish group reported findings but at present none of these have been taken forward and it seems as though the growth zone has been abandoned at present.

Growing Mid Wales Partnership (2015)

5.2.36 Growing Mid Wales Partnership was established in 2015 to progress jobs, growth and the wider economy within the Mid Wales region. The priorities provide an inter-linked programme of activities that are required to deliver sustainable economic growth, more productive jobs and support prosperous communities in Mid Wales by 2033. Mid Wales is a large and predominantly rural region comprising the Local Authority areas of Powys and Ceredigion. It accounts for 39% of the land mass of Wales but only around 7% of the Welsh population. The region has a strong cultural heritage and a high proportion of Welsh speakers.

5.2.37 Mid Wales possesses a number of sectoral strengths that could drive future economic growth. These include:

- Tourism – the Welsh Government’s Strategy for Tourism and the Wales Way initiative highlight the potential of the sector and aspirations to achieve 10% growth in tourism value in Wales by 2020. Opportunities exist to build upon the region’s natural assets in order to diversify and increase the value of the region’s tourism sector.
- Manufacturing – over 6,600 people are employed in the manufacturing sector in Mid Wales, half of which are within the advanced manufacturing sector. The life sciences are a strength within Ceredigion with the presence of companies including Protherics UK Ltd and Aber Instruments.

- Agriculture and the land based economy - this sector is of paramount importance to the Mid Wales economy, employing over 58,000 people and being instrumental to the region's culture and communities. The sector faces significant challenges and uncertainty as a result of BREXIT. Opportunities exist to diversify and add value to the agricultural sector by continuing to support diversification; adding value to agricultural produce; and exploiting the research and development strengths of Aberystwyth University and Food Centre Wales, Horeb.
- Defence and security – Mid Wales is an important location for UK defence operations, capitalising on the region's remoteness and secure sites. The region is home to pioneering defence-related activity, with segregated airspace for Remotely Piloted Aircraft Systems (RPAS) off the coast of Ceredigion (Aberporth). Furthermore, the area is home to advanced manufacturing activity linked to defence and security. It also has academic strengths that provide opportunities to secure Mid Wales' place as a centre of the defence and security industry.
- Foundation sectors – based on the long term demographics of the region, the importance of the foundation economy will grow significantly, the ageing population will likely place increasing pressure on service delivery in the social and healthcare sectors. However, this trend also presents real opportunities to demonstrate positive approaches to services delivery challenges and as a means of harnessing the skills and experience of the older generation within Mid Wales.

5.2.38 With regards to supporting employment opportunities in Ceredigion, it is important to note that the employment sites and premises market differs from adjacent regions. This is due to the majority of demand being from businesses already established in the region. There is a need for a long term targeted programme of investment in employment sites and premises to support future economic growth in the region help address issues of market failure and enable private sector investment. An important example of this in Ceredigion is farm diversification and intensification of farming and the land based economy (see section on the Agricultural Economy). For this reason, it is important that the evolution of agriculture is supported.

Mid Wales SWOT Analysis

5.2.39 Mid Wales has many strengths and weaknesses along with challenges and weaknesses when discussing the economy. Some of these have been highlighted by the Growing Mid Wales Partnership and can be seen below:

Strengths

- Sectoral strengths across the region, particularly in agriculture, food, tourism and advanced manufacturing.
- High quality natural environment which supports key sectors (tourism).
- Abundance of natural resources.
- High quality of life acts as an attractor to the area.
- Home to two universities
- Aberystwyth University has 95% of research of internationally recognised standard or higher.
- Low levels of overall deprivation.

Weaknesses

- Outward migration of young working age people.
- The region's transport network is constrained by slow journey speeds, infrequent services and long distances from major urban centres.
- Lack of physical and digital connectivity – poor coverage of both 3G and 4G in some areas of the region. 78.1% of premises in Ceredigion have fixed line Super Fast Broadband. The UK average is 95%.
- Ageing and declining population.
- Underemployment, low wages, productivity and seasonal employment in key sectors of employment.
- High dependency on public sector employment.

Opportunities

- Adoption of new technologies by businesses e.g. foundation sectors.
- Encourage upward mobility of employees/reduce underemployment.
- A growth in tourism sector and unique selling points such as the high quality natural environment.
- The relative importance of the public sector provides opportunities to maximise the economic development impact of anchor institution procurement.
- Further roll out of mobile and broadband technology across Mid Wales

Threats

- Uncertainty regarding the impact of Brexit on key sectors and funding e.g. agriculture.
- Demographic trends resulting in a low and declining working age population.
- Further cuts to public sector budgets given the importance of the sector.
- Narrow economic base (vulnerable to negative shock).
- Lack of investment in infrastructure to support growth.

5.2.40 The vision for Mid Wales is:

By 2033, Mid Wales will be:

“An enterprising and distinctive region delivering economic growth driven by innovation, skills, connectivity and more productive jobs supporting prosperous and bilingual communities.”

5.2.41 Ceredigion’s unique assets will be built upon through collaborative and integrated working to ensure that the economy is recognised by the following characteristics:

- Enterprising – Mid Wales will be a region that builds on its entrepreneurship to provide the foundations for productivity gains. It will develop new enterprises, support existing businesses that have an appetite for growth and attract new businesses and investment to Mid Wales.
- Distinctive – Mid Wales will be considered a distinctive region in Wales. It is a predominantly rural area with a unique environment and cultural heritage, offering a high quality of life for its residents and has economic strengths in areas such as agri-tech and defence that are unique in Wales. The region also has the potential to be an exemplar for decarbonisation and clean growth in the UK.
- Skills – Mid Wales will build on its academic strengths to develop a skilled workforce that meets the demands of the local economic, ensuring local residents can be retained in the region and exploiting available opportunities.
- Innovation – Mid Wales will act as the test bed for innovation, new products and processes initially based around existing expertise in the agri-food, land-based industry, low carbon energy, manufacturing and defence sectors.
- Connectivity – Mid Wales will have improved transport, energy and digital infrastructure, ensuring access to markets for goods and services. Investment in transport infrastructure and services will address pinch points, improve journey times and frequency. Enhanced energy and

digital connectivity will support the establishment of new businesses, increase the efficiency of Mid Wales' existing business base and improve access to services.

- More productive jobs – Mid Wales will create the conditions to support businesses to generate increased numbers of more productive employment opportunities. Better quality and higher paid jobs will be prioritised. Total productivity will improve, increasing the disposable income of Mid Wales' residents whilst helping to deliver inclusive economic growth.
- Prosperous communities – The benefits of economic growth will wherever possible be retained within the region. Opportunities for wealth and employment generation will be accessible to Mid Wales' residents and will be spread equitably across the region.

Innovation

5.2.42 A large focus is given to innovation as it is the focus of Objective 1: An Innovative and Skilled Mid Wales. This includes the development of new business opportunities, products, services, skills and generates higher value jobs. The objective also includes the establishment of a dedicated and evidence-based skills system for Mid Wales which responds to the needs to employers.

5.2.43 Innovation is central to the GMW Partnership's ambition to deliver economic growth, more productive jobs and prosperous communities. Innovation is a tool for building on the region's key assets to develop new goods and services, promote entrepreneurship, internationalise the region's economy and improve long term economic prospects.

5.2.44 Mid Wales and Ceredigion specifically has a number of R&D and sectoral strengths that can help to drive innovation and regional productivity. These include:

- Agri-tech and bioscience – Mid Wales has leading research and development expertise in the agri-tech and bioscience sectors with world leading research centres such as the Institute of Biological,

Environmental and Rural Sciences (IBERS). Opportunities to further exploit the research strengths of the region's agri-tech and bioscience sector exist. An Agricultural Innovation Centre would help to develop new products and processes to facilitate farm diversification; exploit digital technologies and data analytics and address the skills needs of existing and emerging businesses within Mid Wales' agri-tech and food sector.

- Veterinary science – Mid Wales has existing strengths in veterinary science via the Wales Veterinary Science Centre and the £4.2m Vet Hub development. Further investment in veterinary science is needed and Mid Wales is ideally placed to become a leader in providing services to the agricultural sector and training the next generation of vets, thereby addressing a UK wide challenge of recruiting and retaining vets. An Animal Health Campus would therefore promote innovation and address critical skills shortages within this vitally important agricultural sector.
- Radio Spectrum – Ceredigion is an important location for UK defence operations, offering segregated airspace for Remotely Piloted Aircraft Systems (RPAS) off the coast of West Wales. A National Spectrum Innovation, Engineering and Experimentation Centre (N-SIEEC) offers the potential to promote innovation, develop new product and applications, supporting resilience, integrity and security to place Mid Wales at the centre of UK Government's Spectrum Strategy. The potential applications of Spectrum technology into use of robotics, drones and smart machinery in agriculture. Spectrum developments also provide opportunities to develop an Unmanned Aerial Vehicle and Drone Centre of Excellence with an associated programme of funded research and development.
- Manufacturing – Mid Wales has a significant manufacturing presence with over 6,600 people employed in the sector. The region is home to key manufacturing businesses, with niches in food production, automation and motion, engineering, and emerging technologies such as hydrogen powered vehicles.

5.2.45 Ensuring the right supply and location of employment land and commercial premises to meet business needs is available as a vital component of

supporting the growth and sustainability of the regional economy. An analysis and understanding of the employment sites and premises property market is essential to ensure a strategic and planned approach to supporting future provision. An Employment Land Review (ELR) has been undertaken which identifies employment land in Ceredigion. This document will be updated every 4 years.

5.2.46 Investment in low carbon energy generation and distribution provides a significant opportunity to support economic growth and diversification in Mid Wales. Currently this is hampered by an underpowered transmission and distribution network. Investment in grid infrastructure to increase capacity is critical to support long term growth. The region is well placed to capitalise on low carbon opportunities and manage the transition towards a low carbon future and clean growth. There is considerable expertise in this field across the private, voluntary and public sectors notably the Centre for Alternative Technology and Aberystwyth University. There is currently an NDF in the consultation process which will discuss and refer to these issues, and the economic evidence base will be updated accordingly once the consultation is released.

5.2.47 Existing network capacity for heat and power is a major constraint in Mid Wales, limiting both transmission and distribution potential. The region's rurality means grid access for customers is restricted and the lack of capacity is likely to constrain future growth unless addressed. The Council are undertaking a renewable energy audit and these structural issues will feed into this evidence base which will be ready for deposit of the plan.

Harbours

5.2.48 The Mid Wales coastline is home to a network of harbour facilities that add to the image and future potential of the region. Aberaeron harbour provides the town with a distinct visual identity and acts as a major draw for visitors and tourists. New Quay harbour supports a thriving tourism trade based upon the quality of its natural marine habitat whilst Cardigan has a history of shipping and commerce. Significant opportunities exist to attract investment

in the region's harbours as a way to diversify the tourism offer and increase its return and contribution to economic growth in Mid Wales.

Local Policy

Ceredigion for All: Our Livelihoods, Our Economic Regeneration Strategy 2014-2020 (2015)

5.2.49 The Council adopted its Ceredigion for All: Our Livelihoods, Our Economic Regeneration Strategy in June 2015. The aim of the Strategy is to address some of the key challenges evident within the county, namely:

- Inaccessibility,
- An ageing population,
- A significant reduction in the number of VAT registrations and an increase in VAT de-registrations,
- The lowest proportion of knowledge intensive businesses in the whole of Wales,
- Low productivity levels,
- Low wages, and
- A lack of strong leadership and clarity of direction

5.2.50 This strategy seeks to identify and integrate its key assets in a bid to turn these socio-economic issues into opportunities for the county. While the Strategy has taken into account the contents of the LDP and recognised that the LDP can help facilitate its aims, it does not currently create a need to amend the LDP itself.

5.3 Evidence

5.3.1 Since the LDP went to Deposit, the following evidence has been released/updated.

5.3.2 An employment Land Review of Ceredigion has been completed assessing the quantitative and qualitative features of employment land countywide. Further discussion of the results is discussed below. This work has established, where and how much employment land is available, including if it is built, committed, or available. The study will feed into the ongoing work on the larger than local employment study being undertaken under the

auspices of Growing Mid Wales due to be completed late 2019, results of which will feed into the Deposit plan.

Labour Force Survey (2015)

- 5.3.3 The results of the national Labour Force Survey can be found here:
<https://www.nomisweb.co.uk/reports/lmp/gor/2013265930/report.aspx>

Superfast-Cymru (2016)

- 5.3.4 The rollout of broadband in Ceredigion is ongoing. Approximately 50% of premises across the county have access to superfast broadband.
- 5.3.5 Most Ceredigion exchanges have been enabled, with the three remaining to be enabled this year (2016). Work is ongoing to increase the number of premises connected. Further information can be found on superfast-cymru.com

Employment Land Review (2019)

- 5.3.6 For the 2016 survey a comprehensive review of nationally published guidance and best practice was conducted and a site assessment methodology developed. The purpose of this review was to ensure the Employment Land Review was in conformity with Welsh Government planning guidance. In particular it was a reflection of the requirements of:
- Planning Policy Wales Edition 9 November 2016;
 - Technical Advice Note 23 on Economic Development (2014); and
 - Practice Guidance on Building an Economic Evidence Base to support a local Plan (2015)
- 5.3.7 An ELR has been completed in April 2019. The report represents the first analysis of the base data from the 2016/17 survey. Since the base data, Planning Policy Wales (PPW) Edition 10 has been published in December 2018. However, this has had no impact on the methodology previously used for the survey. For the purposes of the report employment land uses are taken to include those in Use Classes B1, B2, B8, A2 (office) and Unique uses that closely relate to B class uses. The 2016/2017 ELR covers:

- All Ceredigion County Council LDP Employment and Mixed Use allocated sites.
- Windfall employment sites of more than 0.5 ha in the County.
- All potential employment sites of over 0.5 ha in the County.

5.3.8 Of the review undertaken, there is 220.89 ha countywide of existing employment stock (developed) and a further 62.37 ha of undeveloped land committed for employment uses either by allocation or planning consent. It is important to note that the distribution of employment land demonstrates that the greatest opportunity lies in the most sustainable locations, with the largest share in the regionally important Aberystwyth.

5.3.9 The ELR assessed the qualitative factors that affect countywide employment land. These include the quality of the environment and transport links associated with the site and whether the site had positive or negative adjoining uses. From this, it has been found that 90% of surveyed sites are considered high quality; 75% being considered as not being impacted on by amenity issues; only 15% of the available employment land having off-putting neighbouring uses; 80% of employment land is located or is highly visible to an A road and 85% of countywide employment land is only partially constrained or is unconstrained.

6. Analysis (Options for addressing the Issue)

6.1.1 There are a number of issues to consider in relation to the rural economy, many of which are awaiting further evidence including the larger than local employment study and the Renewable Energy Audit all due to be completed in late 2019. But in brief the key issues are:

- Consideration of future land allocations for employment sites given the availability of land countywide as described in the Employment land review, in particular what the future direction of the Capel Bangor Site Allocation is which will most likely be conclusions drawn from the Larger

than Local Employment Study being conducted with GMW results anticipated toward the end of 2019..

- Having investigated the types of employment sites countywide and the availability of land across the settlement group's, consideration of whether we need to Introduce a safeguarding policy for existing employment sites needs to be undertaken.
- Further consideration of the acceptability of leisure uses on employment sites is required given the often received queries through the development management service for gyms and soft play centres in areas safeguarded for B uses.
- Finally consideration of ways in which we can support the Agricultural Economy and the emerging plans of the GMW framework for supporting and diversifying the rural economy.

7. Conclusions / Recommendations

7.1.1 There are no specific policy changes to emerge from this topic paper as the changes to the retail policy have been discussed in the retail topic paper. However what this paper has done is draw attention to the fact there are emerging focuses for growth across the region and the policies have been reviewed to ensure that they are as permissive as possible without compromising their effectiveness to allow for the proposed growth. This is because at present the plans are not firm enough that specific allocations can be made. This paper has also confirmed the importance of the growing evidence base and highlighted that the economy policies need to be kept under review for deposit in light of the emerging Larger than Local Employment Study, further work around Growing Mid Wales and the Renewable Energy Audit.

7.1.2 Ceredigion is not an employment growth led county, much of the allocated employment land takes a significant amount of time to be developed as is the case in most rural areas. It is likely that not much further land will be required beyond that expected to be carried forward from allocated employment sites across the county. Largely jobs growth occurs on non-

allocated sites, often in home based businesses and therefore can't be planned for; What we have established is our policies are capable of flexibility and supporting growth wherever sustainable it occurs as has happened in the preceding plan period and are able to accommodate the emerging plans of GMW which have been outlined in this paper.

DRAFT