



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Employment Land Review

Brecon Beacons National Park Authority

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1.0 Introduction

1.1 This Employment Land Study has been commissioned by Brecon Beacons National Park Authority to inform its forthcoming Local Development Plan (LDP). It is intended to assist the National Park Authority in its assessment of the anticipated future direction of the economy and, in so doing, will inform its decision making process regarding the identification and development of land in order to achieve its economic aspirations and to meet future employment requirements.

1.2 The key aims of the study are to:

- 1 Review the existing employment stock within Brecon Beacons National Park and consider its role, quality, fitness for purpose and its current and potential future contribution to the local economy;
- 2 Review the key (existing and anticipated) economic sectors within Brecon Beacons and discuss the land and property requirements arising from these activities;
- 3 Consider the National Park's future employment land and premises requirements over the period to 2022; and,
- 4 If necessary, identify the scale, location and type of additional sites that are needed to meet the future requirements of Brecon Beacons National Park.

1.3 In the absence of Welsh guidance, the starting point for this study has been the advice contained within the 2004 (then) DCLG Employment Land Review Guidance Note. However, the detailed methodology that we have adopted has been amended to reflect latest thinking in relation to employment land studies and the specific context of the National Park.

1.4 The traditional scope of employment land reviews is solely limited to those activities contained within the group of B Class uses, as follows:

- 1 B1(a) Offices, not A2 (financial and professional services), (b) Research and development, studio, laboratories, high tech, (c) Light Industry;
- 2 B2: General Industry; and,
- 3 B8 Storage and Distribution: wholesale warehouse, distribution centres, repositories.

1.5 However, Paragraph 7.1 of draft PPW Chapter 7 explains that the Welsh Government defines economic development as the “*development of land and buildings for activities that generate wealth, jobs and incomes*”. It states that it is essential that the planning system considers and makes provision for the needs of the entire economy and that it does not concentrate solely upon traditional employment land uses. This approach is particularly important in the Brecon Beacons, where traditional B Class employment sectors are significantly less important in employment and economic terms than other activities. For this reason, and in order to provide a comprehensive overview of the local

economy within Brecon Beacons, the scope of this study has been expanded to take account of the following non-B Class sectors:

- 1 Tourism;
- 2 Agriculture; and,
- 3 Public sector.

1.6 Our review of these key non-B Class activities is intended to provide an understanding of their relative importance within the local economy and an indication of the likely future changes in their role. It will also consider the implications of these changes upon the economic well-being of the National Park and the achievement of Brecon Beacon's National Park Authority's economic development aspirations. It is not intended to provide a detailed study or analysis in respect of these sectors and is not designed to provide a specific land requirement figure or recommendations in respect of the possible allocation of land for such purposes.

The Implications of the Brecon Beacon's Status as a National Park

1.7 The starting point in any employment land study must be a clear understanding of the character of local area and the extent to which this has shaped – and continues to shape – its economic well-being. A detailed overview of the local context is set out in Chapter 2. At this stage it is important to frame the study within an understanding of the Brecon Beacon's status as a National Park.

1.8 The Brecon Beacons was designated a National Park Authority in 1957 under the 1949 National Parks and Access to the Countryside Act, but their current framework is the Environment Act 1995.

1.9 The Environment Act 1995 places a statutory obligation on the NPA to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park as well as to promote opportunities for the understanding and enjoyment of its special qualities by the public. In order to help guide the achievement of this obligation National Parks Authorities are required to prepare a Management Plan.

1.10 The Vision in the BBNPA Management Plan (2010-2015) seeks to ensure that in 2030 the Brecon Beacons National Park will be:

- 1 Recognised internationally and nationally for its value as a protected area;
- 2 Widely acclaimed for its natural beauty, geodiversity, biodiversity and cultural heritage;
- 3 A sought-after destination providing an outstanding variety of sustainable opportunities for all to understand and enjoy its tranquillity, rural character, Welsh way of life, sense of remoteness and other special qualities;
- 4 Resilient, open and responsive to change;

- 5 Less dependent upon external supply chains;
- 6 A living landscape where people can earn a living from the land in an innovative and sustainable manner;
- 7 Managed sustainably through active partnerships among the Park's stakeholders so that it continues to be a source of inspiration and enjoyment for future generations; and
- 8 Monitored over the long term to improve future policy and management practice.

1.11 This vision is augmented by a number of specific aims. In respect of the economic and social well-being of Communities, the Management Plan includes the following aims:

“LC1 The Park’s people, Welsh language and heritage and rich economy will continue to thrive, supporting healthy communities and the environment whilst providing a welcome for visitors.

...

LC4 The Park will be supported by an exemplar sustainable tourism industry which contributes to the public’s enjoyment of the area’s special qualities and to the local economy.

...

LC6 A mixture of farming, small rural businesses, traditional land-use businesses, land management organisations, local services and sustainable tourism industries will maximise the economic potential of the Park’s special qualities whilst promoting resource conservation.

LC7 Individuals will have access to employment opportunities and modern amenities appropriate to the context of the Park’s purposes and duty.

...

LC13 Everyone will understand and appreciate how the planning process helps to achieve the Park’s purposes and duty.

LC14 All those with an interest in the Brecon Beacons National Park will understand and embrace the vision of this special place and work together to sustain it.”

1.12 Importantly, the requirements of the Environment Act do not serve to preclude development within any National Park but do establish an obligation that any such development should not conflict with the statutory purposes or duty of the National Park Authority. The status of the Brecon Beacons as a National Park is central to all activities that are undertaken by the Authority and all functions, including those relating to the promotion and enhancement of the local economy, must be viewed in the context of these primary objectives. However, there can be a clear synergy between the promotion of the economy and the enhancement of the local environment.

1.13 This conclusion was drawn out in the 2006 report *“Valuing our Environment: Economic Impact of the National Parks of Wales”*. This recognised that *“given*

the special nature of the (National) Parks the range and type of economic activity is limited. As a result the internal economy is different from the wider economy not only in scale but also in shape". However, it notes that economic activity linked to the environment in the National Parks make a considerable contribution to the economy of Wales. This is quantified at 11,926 jobs across the three Welsh National Parks and incomes amounting to £177 million.

- 1.14 In order for economic development in the Brecon Beacons to be sustainable, all activities should aim to enhance the quality of the environment and the quality of life for the local communities and visitors alike. Economic development is not viewed as an overriding aspiration in itself but is viewed in the context of providing a mechanism by which the National Park Authority's environmental and social goals might be achieved. This reality was highlighted by the *Valuing our Environment* report which states that whilst 17% of Welsh jobs are linked to the environment, a total of 38% of jobs in the three Welsh National Parks are linked to the environment. Much of this difference is seen in the dominance of those sectors that use the environment (mainly agriculture) and those which depend upon the quality of the environment (mainly tourism related sectors).
- 1.15 Like all other elements of the Brecon Beacons LDP evidence base, the Employment Land Review must fit within this local context. It should recognise that future economic growth must respect the quality of the local environment and take account of the implications of Brecon Beacon's geographical location. Whilst the economy is likely to experience change over the LDP period, its structural bases will be retained. It is likely to continue to be characterised by micro businesses and the close connection between the environment and the economy is also likely to be preserved. This will impact upon opportunities that exist and the types of activity that can be undertaken in the local area.

Methodology

- 1.16 The overall approach that we have adopted in undertaking this Employment Land Review is set out below. The purpose of the Employment Land Review is to build upon the current context in the Brecon Beacons and to provide a basis for the future enhancement of its economy. It must therefore be rooted in an appreciation of the current demographic, economic and physical context and the ways in which these matters impact upon the scale and direction of future growth. A detailed review of the current context is therefore a key initial stage of the study. However, the fact that economic, demographic and social trends do not respect administrative boundaries can create difficulties in the collection and interpretation of data. Large amounts of information are collected on a district level but Brecon Beacons is not a local authority and its position – straddling parts of Powys, Monmouthshire, Carmarthenshire, Rhondda Cynon Taff, Merthyr Tydfil, Blaenau Gwent and Torfaen – means that this data is not specifically available for Brecon Beacons National Park. Where possible, we have sought to overcome this challenge by reviewing data at a parish and by ward level or identifying alternative sources of data.

- 1.17 A key input into the study was engagement with various stakeholders. The consultation strategy drew a number of elements together, as follows:
- 1 **Discussions with local agents.** Rather than including a single agent within the project team, our preferred approach has been to adopt a 'portfolio' approach and to liaise with a number of agents that are active in the local market. Detailed discussions were undertaken with a number of local agents in order to ascertain their views on the strength of the local market and the likely requirements for land and premises to sustain growth in the future.
 - 2 **Stakeholder Consultation.** Additional discussions were held with some local businesses, key inward investors, developers and economic development representations from most of the National Park's constituent Local Authorities. This involved predominantly telephone interviews and sought to gain people's views on the current and emerging employment land needs within the local area.
- 1.18 Other key inputs included an assessment of existing business premises and locations. NLP developed a site assessment matrix which was used to inform our site-surveys and to judge the quality and the fitness for purpose of existing business premises within the National Park. Our survey of business locations was based upon a list of premises that was provided by the National Park Authority. Although it was not possible to survey each individual business unit within the National Park, our approach did provide a detailed overview of existing employment sites.
- 1.19 In addition, a review of recent trends in the local property market and demand for different types of employment space was undertaken, based upon a review of published statistics relating to levels of development, business enquiries and activity levels. This process helped to inform our assessment of the need for additional space for business purposes which also relied upon employment forecasts which have been undertaken by Experian Business Strategies Limited specifically for this study.



This report is structured as follows:

- An overview of the current economic conditions and recent trends in the Brecon Beacons National Park (Chapter 2);
- An overview of the key planning and economic development policies that are relevant in the Brecon Beacons (Chapter 3);
- An assessment of the current stock of employment space in the National Park (Chapter 4);
- A summary of the consultation process that informed this study (Chapter 5);
- A review of existing employment sites in the Brecon Beacons in terms of their quality and adequacy to meet current and anticipated future needs and the scope for their potential release or redevelopment (Chapter 6);
- An assessment of the level of employment land that is required to meet future needs (Chapter 7);
- A review of potential sites that could come forward to meet the identified level of future need (Chapter 8);
- A review of the role of non-B Class sectors within the local economy (Chapter 9); and,
- Conclusions and recommendations (Chapter 10).

2.0 Local Context

- 2.1 Planning Policy Wales (PPW) and the LDP Manual emphasise the importance of ensuring that LDPs are appropriately supported by a robust evidence base of their local circumstances. On this basis, this chapter sets out the existing geographical, social and economic context of Brecon Beacons National Park.
- 2.2 Some area specific contextual information is not available for the National Park. In order to address this issue, consideration has also been given to the published statistics for the component Local Authorities which make up the Brecon Beacons National Park and also to the individual wards within the National Park. A comparative assessment has been undertaken of the National Park in relation to Wales in order to achieve a clearer understanding of the local economic performance of the Brecon Beacons National Park.
- 2.3 The analysis in this section examines the range of indicators relating to employment, economic activity and the labour market. It concludes by setting out the main strengths and weaknesses of the National Park.

Geographical Context

- 2.4 Brecon Beacons extends to 520 square miles (1,344 square kilometres) and stretches as far as Ffairfach (Carmarthenshire) in the west and Llanfihangel Crucorney (Monmouthshire) in the east.
- 2.5 The National Park occupies a unique location between rural Mid Wales and the industrial South Wales Valleys. It lies at the junction of a number of Spatial Plan Areas – Swansea Bay, South-East Capital Region and Central Wales. Figure 2.1 below shows the geographic extent of the BBNPA.

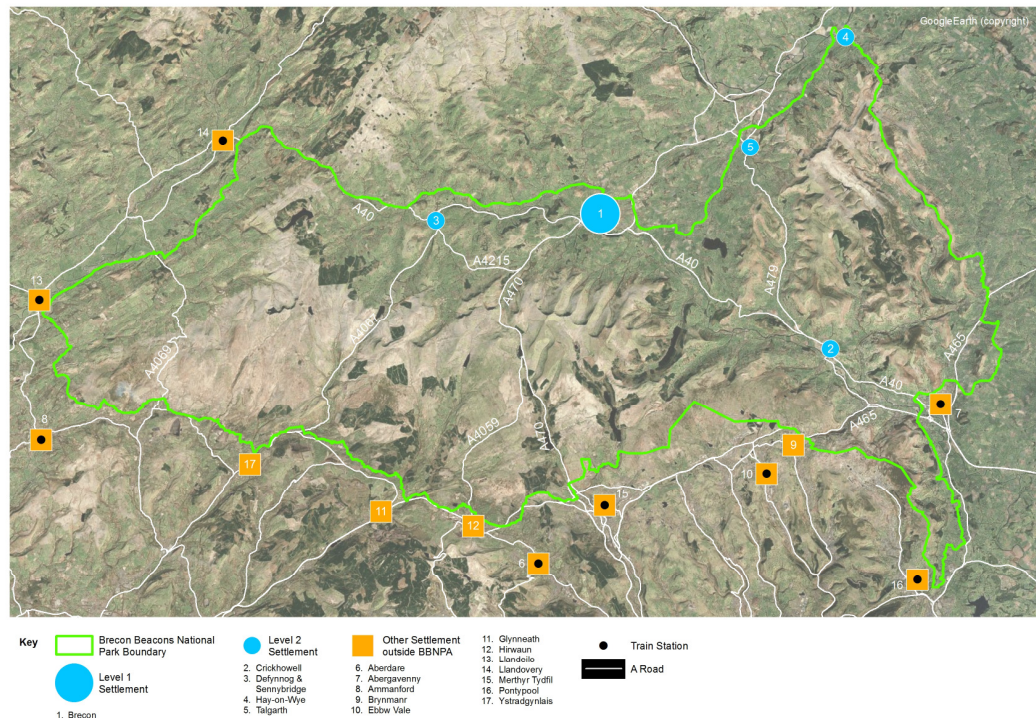
Settlement geography

- 2.6 The National Park's primary key settlement is Brecon. This is located on the northern boundary of the Site, at a key junction between the A470 and the A40 and is the spatial hub for the BBNPA. Other identified key settlements within the National Park are Talgarth, Crickhowell and Hay-on-Wye which are located in the North East of the National Park and form the BBNPA Cluster. This is identified as having an important strategic function in serving the surrounding communities.
- 2.7 Sennybridge and Defynnog is the most westerly key settlement within the National Park. These four identified key settlements serve both their residential population and surrounding settlements. Other smaller settlements are focused around the north of the National Park and along the A40 route between Brecon and Abergavenny.
- 2.8 Figure 2.1 also shows the close proximity of many large settlements such as Merthyr Tydfil, Abergavenny and Llandeilo which are located just outside of the National Park boundary.

Accessibility

- 2.9 Although there are no railway stations within the National Park, a number of services are located close to the National Park boundaries at e.g. at Merthyr Tydfil, Abergavenny and Llandovery. Brecon also acts as the main hub for bus travel.
- 2.10 In terms of vehicular routes, the A470 presents a key north/south transportation link which dissects the National Park into two halves. The Heads of the Valleys Road (A465) is located close to the southern boundary of the National Park and provides a key west/east linkage connecting many settlements such as Merthyr Tydfil, Hirwaun and Glynneath. The A40 also provides another key transportation link which is located along the northern boundary to the west of Brecon then passes through the National Park between Brecon and Abergavenny.
- 2.11 Key cycle routes are provided in north/south directions between Merthyr Tydfil and Brecon, Abergavenny to Hay-on-Wye and Hay-on-Wye to Built Wells.

Figure 2.1 Geography of Brecon Beacons



Local Authority composition

- 2.12 The Brecon Beacons National Park straddles nine Local Authority boundaries (see Figure 2.2 overleaf), although two of these Local Authorities have a very small level of population within the National Park.

Table 2.1 Brecon Beacons National Park Population in relation to individual Local Authorities

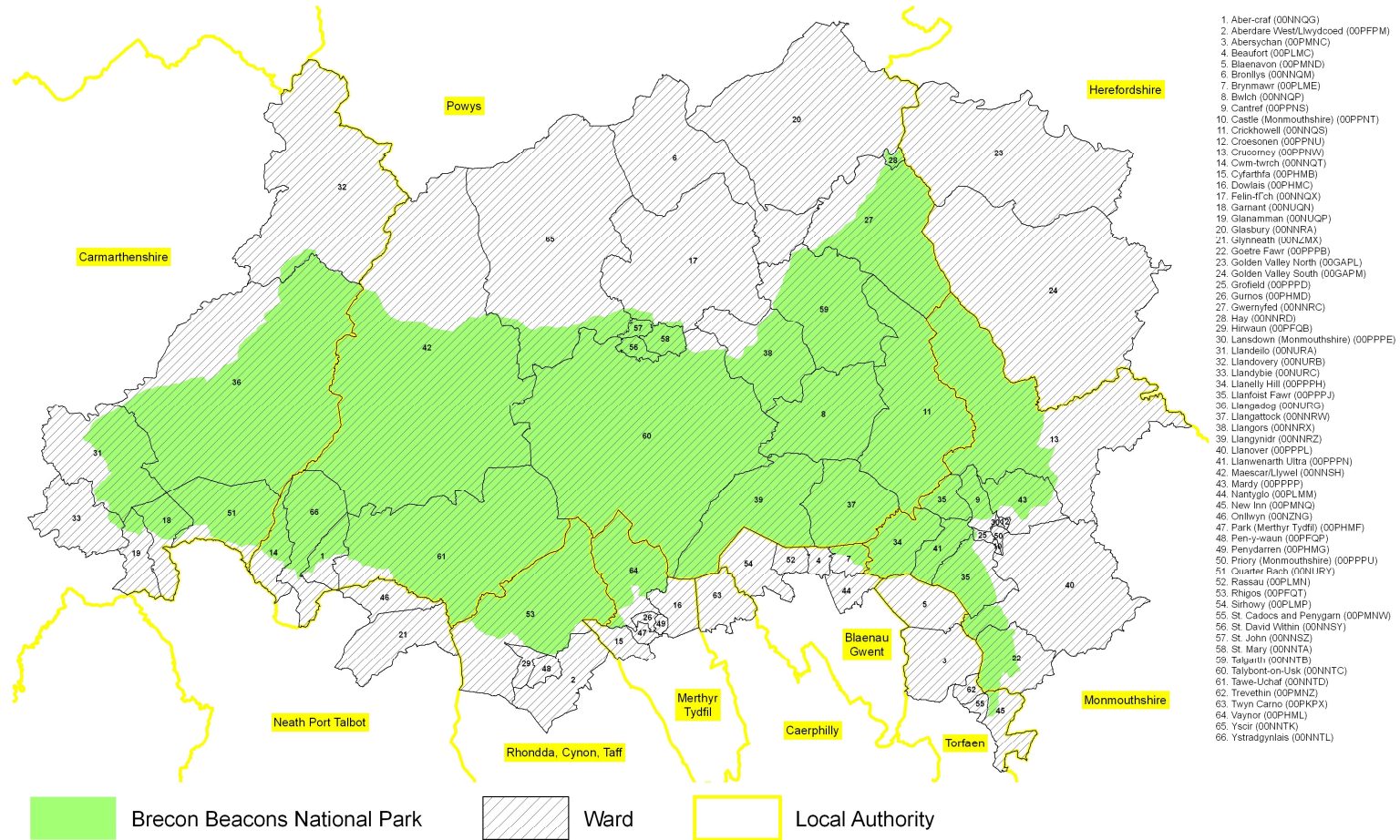
Local Authority	Population within BBNP	Share of BBNP Population (%)	Share of respective LA Population (%)
Powys	23,130	70.2	17.5
Monmouthshire	6,803	20.7	7.7
Carmarthenshire	1,694	5.1	0.9
Rhondda Cynon Taff	836	2.5	0.4
Merthyr Tydfil	408	1.2	0.7
Blaenau Gwent*	54	0.2	0.08
Torfaen*	18	0.1	0.02
TOTAL	32,943	100	3.88

Source: NLP analysis based on ward population proportions supplied by BBNPA

2.13

The National Park status does not mean that all the land within the Park is within the Park is within public ownership. The National Park Authority owns 14.3% of the Park with the majority of the Park being privately owned by estate owners, farmer and householders as well as large public and charitable landowners.

Figure 2.2 Context of the Brecon Beacons National Park



1. Aber-eraf (00N1CG)
2. Aberdare West/Llwydcoed (00PFPM)
3. Abersychan (00PMNC)
4. Beaufort (00PLMC)
5. Blaenavon (00PMND)
6. Bronllys (00N1GM)
7. Brynmawr (00PLME)
8. Bwlch (00N1QP)
9. Cantref (00PPNS)
10. Castle (Monmouthshire) (00PPNT)
11. Crickhowell (00N1GS)
12. Croesonen (00PPNU)
13. Cruosney (00PPNW)
14. Cwm-twrch (00N1GT)
15. Cyfartha (00PHME)
16. Dowlais (00PHMC)
17. Felin-fach (00N1GX)
18. Gaimant (00L1GH)
19. Glanamman (00N1QP)
20. Glasbury (00N1RA)
21. Glynneath (00N1MX)
22. Goetre Fawr (00PPFB)
23. Golden Valley North (00GAPL)
24. Golden Valley South (00GAPM)
25. Grofield (00PPPD)
26. Gurnos (00PHMD)
27. Gwernyfed (00N1RC)
28. Hay (00N1RD)
29. Hirwaun (00PFQB)
30. Lansdown (Monmouthshire) (00PPPE)
31. Llandello (00N1RA)
32. Llandovery (00N1UR)
33. Llandybie (00N1UR)
34. Llanelly Hill (00PPPH)
35. Llanelst Fawr (00PPPL)
36. Llangedog (00N1UR)
37. Llangatock (00N1RW)
38. Llangors (00N1RX)
39. Llanyrni (00N1RZ)
40. Llanover (00PPPL)
41. Llanwenarth Ultra (00PPPN)
42. Maescarllyswel (00N1SH)
43. Mardy (00PPPF)
44. Nantyllo (00PLMM)
45. New Inn (00PMNQ)
46. Onilwyn (00N1ZG)
47. Park (Merthyr Tydfil) (00PHMF)
48. Pen-y-waun (00PFQP)
49. Penydarren (00PHMG)
50. Pwll (Monmouthshire) (00PPPU)
51. Quarter Reach (KRN1RY)
52. Rassau (00PLMM)
53. Rhigos (00PFQT)
54. Sirhowy (00FLMP)
55. St Cadocs and Penygarn (00PMNV)
56. St David Within (00N1SY)
57. St John (00N1SZ)
58. St Mary (00N1NT)
59. Talythiri (00N1TE)
60. Talybont-on-Usk (00N1TC)
61. Tawe-Uchaf (00N1TD)
62. Trevein (00PMNZ)
63. Twyn Carno (00PKFX)
64. Vaynor (00PHML)
65. Yscir (00N1TK)
66. Ystradgynlais (00N1TL)

Population

- 2.14 In 2010 the population of the National Park was estimated to be 32,367. This represents a 0.2% increase on the 2001 population of 32,295, a much lower rate of increase than was experienced in Wales over the same period. This lower rate is not surprising given the demographic profile and housing supply within the Brecon Beacons National Park, both of which will act as a control upon potential rates of population change.

Table 2.2 Population change in Brecon Beacons and Wales, 2001-2010

	2001	2010	Change (%)
BBNP	32,295	32,367	0.2
Wales	2,910,100	3,606,430	3.3

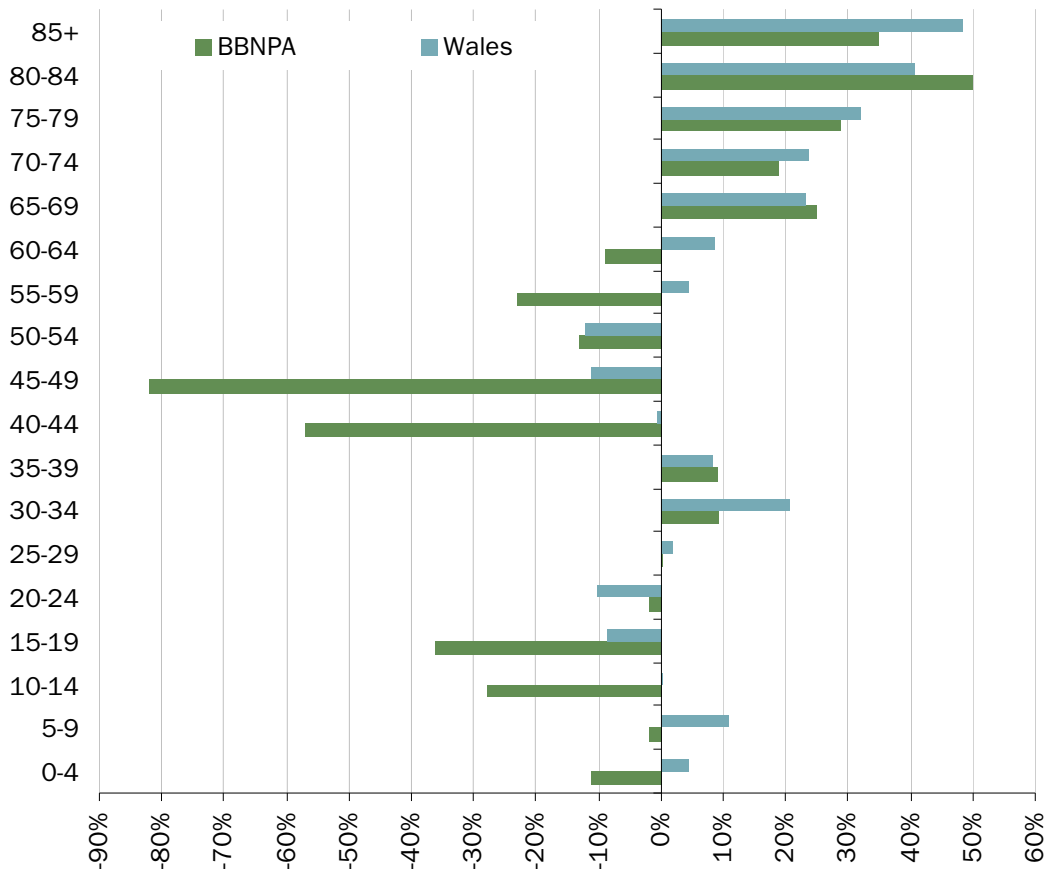
Source: 2010 Mid Year Population Estimates, StatsWales

- 2.15 The majority of the Brecon Beacon's population live in the unitary authorities of Powys (70%) and Monmouthshire (21%) in small villages and towns, the largest of which is the cathedral town of Brecon which has a population of approximately 7,500.
- 2.16 In 2001 the population density of BBNP was 0.24 persons per hectare. This is significantly lower than the average for Wales of 1.4 persons per hectare. The 2010 average household size within BNPP (2.14) is slightly lower than the Welsh average (2.24). It can be concluded from this that the population density of settlements in BBNP is likely to be principally a function of the character of the area and the fact that large areas of the National Park are away from the main settlements and are very sparsely populated.

Population Projection

- 2.17 The 2008 based sub-national population projections which have been prepared by the Welsh Government reveal a substantial difference in the anticipated level of population change between 2008 and 2028 in BBNP and Wales. The population increase for Wales (11%) is expected to be over five times that of BBNP (1.9%).

Figure 2.3 Population Projection for BBNPA and Wales, 2008 – 2028



Source: 2008-based Welsh Assembly Population Projections, StatsWales

2.18 The analysis of these figures reveals some interesting trends. Whilst the anticipated increase in the number of pensioners is broadly similar, there are substantial differences in the numbers of children and people of working age. The number of people in these groups is expected to fall much more significantly in BBNP than to Wales. These trends will have implications in terms of the type of public services and facilities and also in respect of the prospects for long term economic growth.

Economic Activity

2.19 Data on economic activity is not available at a National Park scale so we have considered the respective levels in each of the constituent local authorities. In adopting this approach, it is important to recognise that the average rates for the local authorities as a whole may not be representative of the parts of each authority that fall within the National Park or of the National Park as a whole.

2.20 In 2001 there were 10,100 people of working age within BBNP, of which 65.2% were economically active (2001 Census). Figure 2.2 shows that the lowest level of economic activity is to the south of the National Park particularly in Rhondda Cynon Taff (62.5%) and Merthyr Tydfil (63.3%). The highest level of economic

activity occurs in wards within Powys (70.2%) and Monmouthshire (72.1%) which was in line with the national average for Wales (70.8%). The level of economic activity in BBNP is slightly lower than the national average and is likely to reflect the high level of inactivity due to early retirement.

2.21 The differences between the levels of economic activity in BBNP can be attributed to the character of each area and the scale and importance of the key settlements. For example, Monmouthshire has a high level of economic activity as it contains Abergavenny to the east of the National Park and Powys contains the key settlements of Brecon, Hay and Talgarth. These locations also benefit from good strategic accessibility with the A40 providing a key link between settlements.

Table 2.3 Economic Activity in Brecon Beacons and Constituent Local Authorities (%)

	BBNP	Powys	Monmouthshire	Carmarthenshire	Rhondda Cynon Taff	Merthyr Tydfil	Wales
Economically Active	65.2	70.2	72.1	65.5	62.5	63.3	70.8
Economically Inactive	34.8	29.8	27.9	34.5	37.5	36.7	29.2

Source: ONS, 2001

2.22 The highest levels of economic inactivity in the BBNP can be attributed to retirement (46%) whilst across all five local authorities the highest level of inactivity is due to long-term sickness (ONS annual population survey). This is particularly high in Merthyr Tydfil (39.7%), Rhondda Cynon Taff (37.1%) and Carmarthenshire (35.5%) which are all significantly above the national average for Wales of 28.3%. In Powys and Monmouthshire the highest levels of economic inactivity can be attributed to retirement and to a certain extent students. The implications of the current demographic profile and future population changes upon the economic performance of the National Park and the need for key public services should be appraised as part of the LDP process.

Table 2.4 Economic Inactivity in Brecon Beacons and Constituent Local Authorities (%)

	Retired	Student	Looking after family/home	Permanently sick/disabled	Other
BBNP	46.0	12.4	14.9	19.4	7.3
Powys	25.6	23.6	15.2	27.2	6.7
Monmouthshire	24.4	20.5	16.8	24.7	10.4
Carmarthenshire	17.0	18.4	23.8	35.5	3.6
Rhondda Cynon Taff	13.2	20.9	18.1	37.1	6.5
Merthyr Tydfil	13.7	10.2	26.7	39.7	6.2
Wales	17.1	22.9	21	30.5	8.6

Source: ONS Annual Population Survey

Employment

2.23

As show in Table 2.5, Powys, Carmarthenshire and Monmouthshire have an above average level of self-employment – at 25.4% Powys is double the national average. This reflects the nature of the economy which is dominated by small scale businesses and reflects an entrepreneurial spirit which is likely to be important in sustaining the future well-being of the National Park. There is generally a lower level of full-time employment in these authority areas. This reflects the character of many of the key economic sectors, the high rates of self-employment and the quality of the local area which might attract people for lifestyle reasons whereby they specifically decide to work only part time rather than full time.

Table 2.5 Employment Activity in Brecon Beacons and Constituent Local Authorities (%)

	Employees: Part time	Employees: Full Time	Self-employed	Unemployed	Full Time Students
Brecon Beacons	16.5	53.6	23.3	4.2	2.4
Powys	17.8	50.5	25.4	4.0	2.4
Monmouthshire	19.5	57.7	15.9	4.0	2.9
Carmarthenshire	18.4	55.8	17.1	5.7	3.0
Rhondda Cynon Taff	17.3	64.0	8.6	6.2	3.8

	Employees: Part time	Employees: Full Time	Self-employed	Unemployed	Full Time Students
Merthyr Tydfil	18.5	63.2	7.9	7.4	3.0
Wales	18.6	59.3	12.6	5.7	3.8

Source: ONS Annual Population Survey

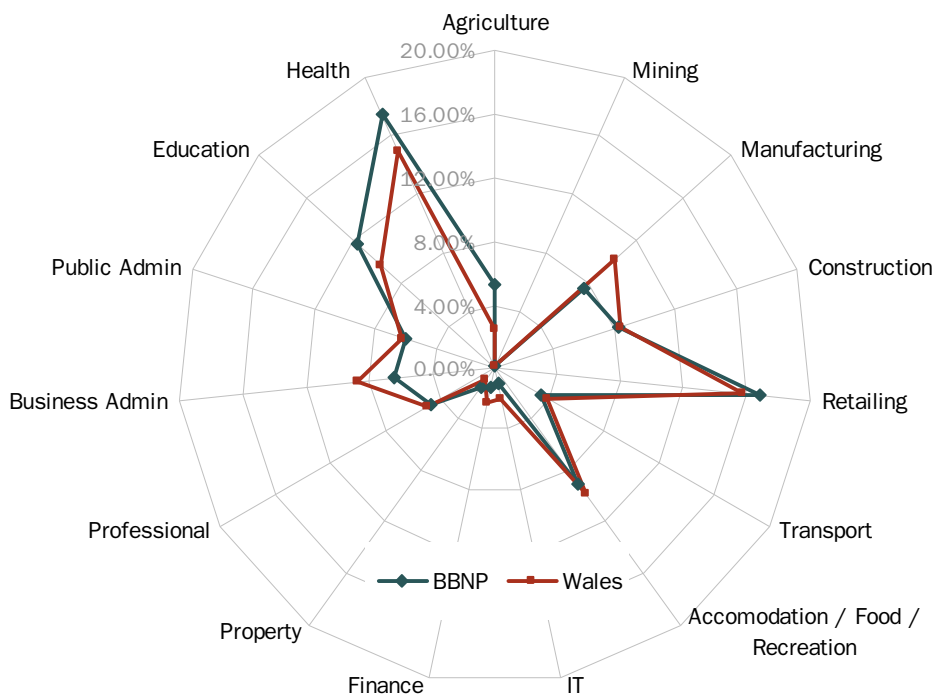
Note: Only full-time students are included as economically active. Part-time students who are economically active are included in the relevant category e.g. part-time employees. Economically inactive students may include full-time and part-time students.

Distribution of Employees by Sector

2.24

Figure 2.4 below demonstrate the importance of 15 different economic centres in the National Park in relation to their role in the Welsh economy, based upon our analysis of data on employment levels in 2012 provided by Experian Business Strategies Ltd.

Figure 2.4 Employment by Sector



Source: Experian Business Strategies Ltd

- 2.25 According to this data census, the largest employment sector in the National Park is health by some considerable margin. This may be attributed to employment generated by Brecon Hospital and presence of local doctors surgeries throughout the National Park. Retail, education accommodation & food and construction also have a relatively significant level of representation in the local area, although of these only accommodation & food and construction are proportionately more important in Brecon Beacons than in Wales as a whole. The BBNP is also a popular visitor destination due to the natural environment with tourism related industries accounting for a large proportion of employment.
- 2.26 The figures also highlight the importance of the public sector in employment terms with public administration, education and health accounting for over 30% of local employment. This accounts for a very large proportion of local employment, and as such, makes a vital contribution to the local economy.
- 2.27 Importantly, this evidence highlights the importance of non-B Class sectors to the local economy within the National Park. In 2012, non-B Class activities account for approximately 70% of employment within the National Park, compared to 63% in Wales and 58% in the UK.

Qualifications

- 2.28 Table 2.6 compares the qualifications of the working age population in the constituent authorities of the National Park to the Welsh average. In the Local Authorities of Powys, Carmarthenshire and Monmouthshire which cover the majority of the BBNP, the levels of qualifications are broadly the same as the national average with slightly above average qualifications at the higher levels.

Table 2.6 Qualification levels within each of the constituent local authorities (%)

	Powys	Carmarthenshire	Monmouthshire	Rhondda Cynon Taff	Merthyr Tydfil	Wales
No qualifications	11.1	14.5	9.3	16.6	18.5	13.3
NVQ Level 1	79.5	78.7	86.7	74.5	73.1	79.4
NVQ Level 2	66.3	65.5	75.3	59.3	56.6	66.4
NVQ Level 3	48.2	49.3	59.3	41.8	38.2	48.5
NVQ Level 4/5	30.0	30.5	36.9	22.5	20.1	28.4
Other/Unknown	9.4	6.9	3.9	8.9	8.4	7.3

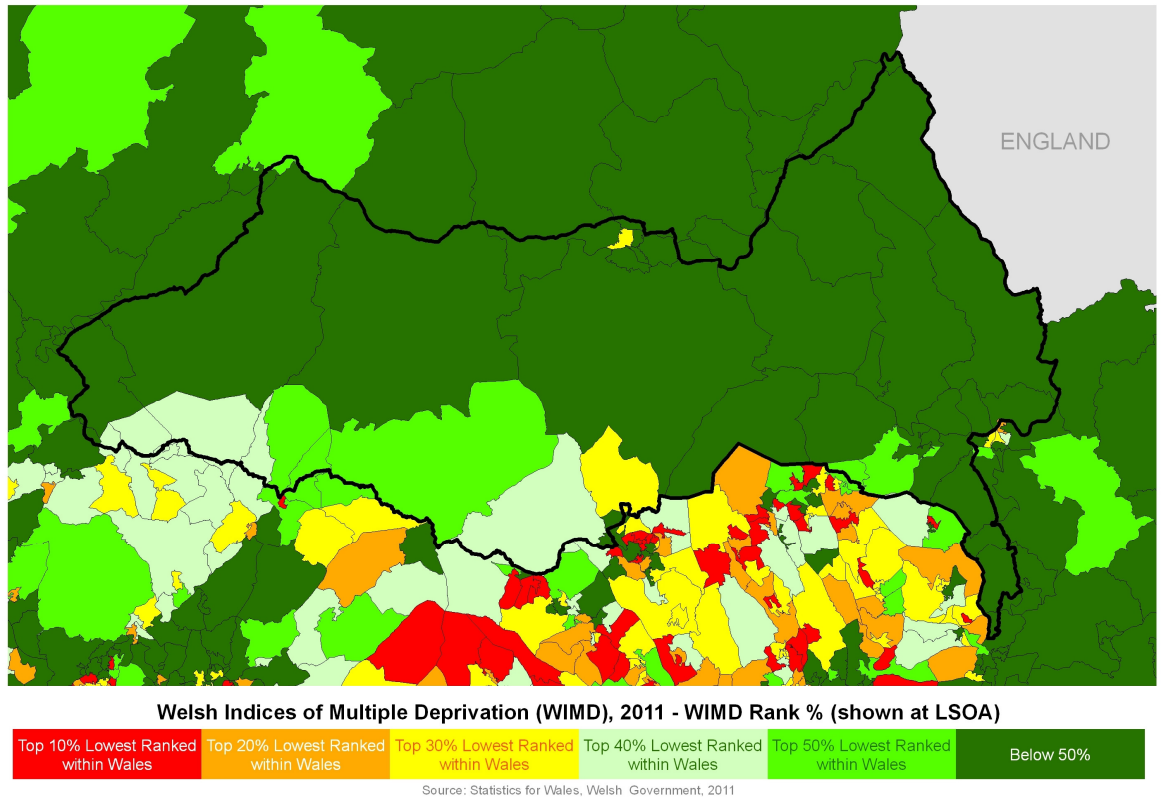
Source: ONS Annual Population Survey, Jan 2010 – Dec 2010

Deprivation

- 2.29 The Social Disadvantage Research Centre¹ has produced and published a set of Indices of Deprivation. These indices provide a range of information including detailed breakdowns for small areas (Super Output Areas) and aggregate summary statistics for each local authority.
- 2.30 Summary measures of the overall Index of Multiple Deprivation (IMD) have been produced at local authority level, which describe different aspects of multiple deprivation in each area. Each of these is designed to capture a particular way in which a local authority may experience multiple deprivation. No single summary is favoured over another, as there is no best way of describing and comparing multiple deprivation. The measures include:
- 1 **Local concentration** – shows the severity of multiple deprivation in each authority, measuring ‘hot-spots’ of deprivation;
 - 2 **Extent** – the proportion of a district’s population that lives in the most deprived Super Output Areas in England;
 - 3 **Average Scores and Average Ranks** – two ways of depicting the average level of deprivation across the entire district; and,
 - 4 **Income Scale and Employment Scale** – the number of people experiencing income and employment deprivation respectively.
- 2.31 There are two Lower Super Output Areas (LSOAs) which are categorised as being within the top 30% of the lowest ranked Welsh Indices of Multiple Deprivation (WIMD), these are Vaynor 1 (ref: W01001323), ranked 20.6%, and St John 2 (ref: W01000491), ranked 20.5%. Whilst the vast majority of the Park is ranked as being below 50% of the lowest ranked WIMD suggesting an overall picture of relatively low levels of deprivation.

¹ The Social Disadvantage Research Centre (SDRC) is an inter-disciplinary social research group carrying out policy related research within the Department of Social Policy and Social Work at the University of Oxford.

Figure 2.5 Deprivation in Brecon Beacons National Park



Source: Statistics for Wales, Welsh Government, 2011

Conclusion

2.32

The table below highlights the key strengths and weaknesses within the economic profile of the Brecon Beacons National Park. These represent the basis for the future enhancement of the local economy by building upon existing strengths, seizing emerging opportunities and addressing current weaknesses and potential threats. The issues raised in this chapter will have important implications for the long term well-being of the Brecon Beacons and should be appraised in detail as part of the LDP process as well as in the preparation of other relevant local strategies.

Table 2.7 SWOT Analysis for BBNP

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> a <i>High quality natural environment</i> b <i>Low unemployment rate</i> c <i>Low levels of depravation</i> d <i>Well developed non-B Class sectors</i> 	<ul style="list-style-type: none"> a <i>High dependency ratio of non-working persons to workers</i> b <i>Low level of economic activity</i>
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> a <i>Further development of environmental-based economic sectors and non B Class activities</i> 	<ul style="list-style-type: none"> a <i>Over-reliance upon a limited range of sectors, including the public sector</i> b <i>Reduction in the number of working age persons</i>

Policy Context

This chapter provides a summary of the relevant economic and planning documents and strategies at the national, regional and local levels. This provides the context within which future employment land allocations and employment policies will be situated.

Welsh Policies

Planning Policy Wales (Edition 4, 2010)

Planning Policy Wales (PPW) sets out the land use planning policies of the Welsh Assembly Government. It forms part of national planning policy along with Technical Advisory Notes, circulars and policy clarification letters. The document outlines a requirement for local planning authorities to ensure that sufficient land that is suitable for development for enterprise and employment uses and well served by infrastructure is designated so as to meet both identified and as yet unidentified needs. Local authorities are encouraged to review all their non-housing allocations when preparing or reviewing their development plans and consider whether some of this land might be better used for housing or mixed use developments or no longer be designated for development.

In rural areas, an integrated development strategy should be prepared to facilitate diversification of the rural economy, seeking to accommodate both traditional rural industries and new enterprises. New rural development sites should generally be located within or adjacent to defined settlement boundaries, preferably where public transport provision is available.

The Welsh Government consulted on an update of Chapter 7 of Planning Policy Wales, *Supporting the Economy*, between November 2011 and March 2012. The draft revised chapter sets out the importance of ensuring growth is not constrained by a shortage of land for economic uses and that local authorities seek to steer economic development to the most appropriate locations rather than prevent or discourage development. Paragraph 7.2.1 states that plans and decisions should be based on up-to-date and locally specific evidence which demonstrates the suitability of existing employment land supply in relation to the locational and development requirements of business. Employment Land Reviews should be undertaken and kept under review.

TAN 6: Planning for Sustainable Rural Economies (July 2010)

Technical Advice Note 6 provides practical guidance on the role of the planning system in supporting the delivery of sustainable rural economies. It recognises that development plans should identify a diverse range of sites suitable for future employment uses and that, where possible, these should be located

within or adjacent to settlement. It promotes the expansion of businesses that are currently located in the open countryside provided there are no unacceptable impacts on local amenity. Where employment sites and premises are in short supply their loss should be resisted unless provision of equivalent or greater employment value is made in the locality.

Wales Spatial Plan Update (2008)

- 3.6 The Wales Spatial Plan (2008 Update) sets out the overarching framework and integration tool for the delivery of future development and policies at national, regional and local level across Wales. Section 11: *Promoting a Sustainable Economy* aims to ensure that as a general principle, employment-related property development is located near public transport and close to housing and infrastructure development with priority given to brownfield over greenfield sites. Section 15: *Central Wales* states the importance of supporting the promotion of strategic employment sectors.

Wales: A Vibrant Economy (November 2005)

- 3.7 This document provides a vision for a vibrant Welsh economy to deliver strong and sustainable economic growth by providing opportunities to all.

Local Policies

Brecon Beacons National Park Management Plan 2010 – 2015 (2010)

- 3.8 The Brecon Beacons National Park Management Plan provides a foundation for the co-ordination of activities within the National Park acting as a blueprint for everyone who shares responsibility for managing the area.
- 3.9 The Management Plan promotes a vision for the National Park which includes healthy and socially inclusive communities and a sustainable, thriving economic, social and cultural life. It recognises that the BBNPA and its partners, in pursuing its statutory purposes, have a duty to "*seek to foster the economic and social well-being of local communities*". Section 7 sets out strategic objectives for planning and development including the allocation of sufficient land for the provision of a variety and mix of employment opportunities to encourage a better link between the provision of employment and housing.

Brecon Economic Development & Regeneration Strategy Development Framework (February 2008)

- 3.10 This Report was prepared by Hyder Consulting in February 2008 and provided a strategy for the study area, setting objectives and actions to enable the Department for the Economy & Transport (DE&T) and its partners Powys County Council (PCC), BBNPA and Tourism Partnership Mid Wales (TPMW), to work towards delivering the strategic vision for Brecon.

- 3.11 This Report's established the following vision for Brecon:-
"A contemporary market town and prominent hub for the Brecon Beacons, celebrated for its outstanding natural and built environment, heritage, tourism, shopping and cultural distinctiveness. As an exemplar for sustainable rural development, it is a popular location for high quality living, working and commercial investment" (Page 14).
- 3.12 In relation to employment specifically this Report considered that, in 2008, there was ongoing, albeit steady, demand for commercial property within Brecon particularly from Small-Medium Enterprises (SMEs) requiring either manufacturing or office accommodation. Vacancy rates within existing employment sites are stated to be low.
- 3.13 The Strategy identified a number of potential proposals throughout Brecon which are identified to improve the town's employment offer, these include:
- 1 The regeneration of Ffrwdgrech Industrial Estate to create more modern premises and attractive employment areas.
 - 2 Identification of brownfield redevelopment sites which may include small scale office/workshop accommodation
 - 3 Focussing future employment growth around the Brecon Enterprise Park (if sites are available)
 - 4 The Regional Employment Site at Cerrigcochion Road for a high quality mix of both small and large scale offices, workshop space and industrial units.
- 3.14 However since the Strategy's publication, no actions have been taken by any partner to lead the implementation of this strategy.
- Welsh Development Agency Property Strategy for Employment in Wales (DTZ, 2004- 2007)**
- 3.15 This (now dated) document sets out the Welsh Government and the (now defunct) Welsh Development Agency's (WDA) strategy for employment sites and buildings across Wales between 2004 and 2007. It was intended that this Strategy be up-dated annually but this has not be undertaken. The Strategy considers existing employment sites and buildings in both public and private sector ownership and also considers potential new employment sites for the future.
- 3.16 In relation to the market in Mid Wales it concludes that:-
- 1 Good quality modern buildings in demand across the area – but especially close to the border.
 - 2 Bulk of demand is from companies already established in area.
 - 3 Some 'niche' opportunities for inward investors linked to quality of environment/lifestyle of area.
 - 4 Demand in the 5k-10k sq ft range is of special importance.

- 3.17 One of the key recommendations of the Strategy is for the urgent review of the future role of all 'employment' sites owned by the WDA (or in which they have a financial interest) to check their relevance to the strategy and, where appropriate, consider alternative future uses. It advised that a similar exercise should follow with sites outside the WDA's ownership and influence.

The BBNPA Sustainable Tourism Strategy (2007)

- 3.18 This Strategy considers the economic value of tourism in BBNPA as well as current National Park tourism strengths, weaknesses, opportunities and threats. Following consultation with tourism, community and conservation bodies it sets out a vision, strategy and action plan for tourism in the BBNPA. The Strategy was approved by BBNPA in January 2007.

The Current Stock of Employment Space

- 4.1 This chapter assesses the current stock of employment land in Brecon Beacons National Park, as well as the amount of development which is committed or is coming forward in the short term. It considers the amount of employment land and the quality of built employment floorspace, broken down by broad types of employment uses. It also examines the amount of B Class employment land that has been lost to other uses in recent years.
- 4.2 The current stock of employment space in the Brecon Beacons National Park was assessed using the following sources:
- a Commercial and Industrial Floorspace and Rateable Value Statistics (2005 Revaluation), 2008 available via the Office for National Statistics;
 - b Information on planning applications database provided by Brecon Beacons National Park Authority; and,
 - c A visual inspection of the land uses in Brecon Beacons National Park.

Existing Stock of Employment Floorspace

- 4.3 Data on the stock of commercial and industrial property is provided via the Office for National Statistics. These statistics are based upon data from the Valuation Office Agency (VOA). The VOA values commercial and industrial property to set business rate values in line with an assessment of the current commercial and industrial rental market. The statistics used in this assessment are based on the 2005 VOA revaluation.
- 4.4 VOA data is not available at a National Park scale so we have undertaken a review of premises at a Middle Super Output Area (MSOA) level. Figure 4.1 shows the boundary of the National Park in relation to the MSOAs and highlights how the MSOA boundaries do not correspond with the boundary of the National Park. Our analysis considers those MSOAs that are partly located within the Brecon Beacons as well as those that are wholly contained within the National Park. Table 4.1 shows the MSOAs which were identified as being largely or wholly located within the National Park boundary.
- 4.5 The implication is that this analysis would have slightly overestimated the stock of employment floorspace within the National Park, although we have sought to limit this impact by taking account of the settlements within those MSOAs which straddled the National Park boundary. In the case of MSOA W02000252 MSOA W02000315 and W02000285, all MSOAs were discounted due to the fact that Hirwaun, Tredegar and Merthyr Tydfil comprised the main settlements within these MSOAs and both settlements are almost entirely located outside of the National Park. These MSOAs were then discounted entirely from the analysis in order to prevent the results from being skewed by the inclusion of both settlements. In the case of Hirwaun, it should be noted that a large business park is located in the edge of the Brecon Beacons boundary (but within Rhondda Cynon Taff) although a vacant potential expansion area falls

within the National Park. As this site has not been developed, the exclusion of this MSOA from our analysis would not result in an important part of the National Park’s employment portfolio being overlooked.

4.6

It is acknowledged that the nature of this analysis means that it is possible that some premises that are located outside of the National Park have been included or excluded however; in the absence of any more reliable data we consider this methodology represents an acceptable alternative in order to provide a proxy.

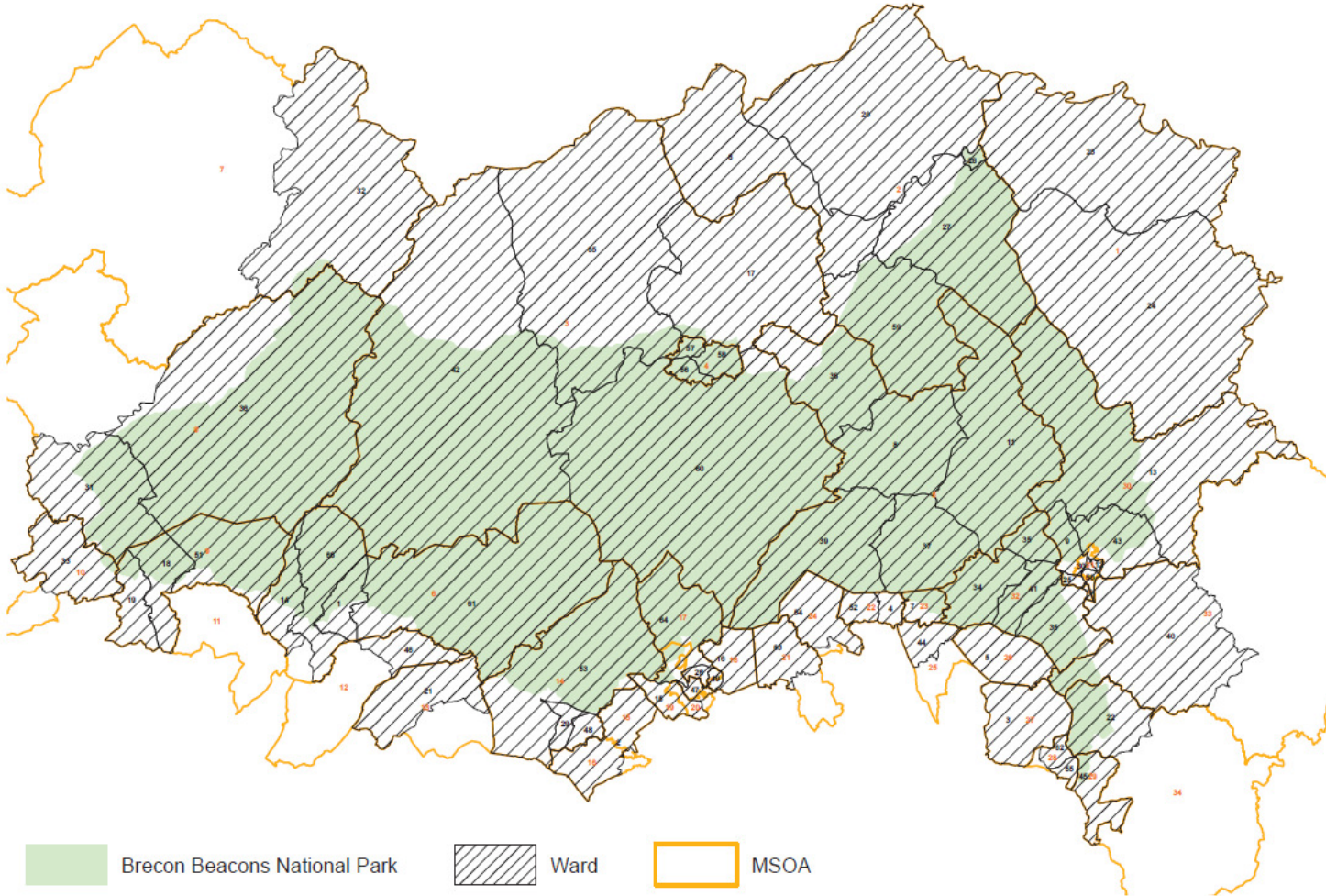
Table 4.1 Brecon Beacon National Park Authority Middle Super Output Areas (MSOAs)

Reference No in Figure 4.1	MSOA Name	MSOA Code
2	Powys 015	W02000111
3	Powys 016	W02000112
4	Powys 017	W02000113
5	Powys 018	W02000114
6	Powys 019	W02000115
8	Carmarthenshire 004	W02000145
9	Carmarthenshire 010	W02000151
14*	<i>Rhondda, Cynon, Taff 001</i>	W02000252
17	Merthyr Tydfil 001	W02000283
19*	<i>Merthyr Tydfil 003</i>	W02000285
23	<i>Blaenau Gwent 002</i>	W02000315
30	Monmouthshire 001	W02000336
32	Monmouthshire 003	W02000338

Source: NLP Analysis of Office of National Statistics Data

**Discounted MSOA due to Hirwaun, Tredegar and Merthyr Tydfil (which are located just outside the National Park) being located within the MSOA and therefore skewing the results*

Figure 4.1 MSOA boundaries in Brecon Beacons National Park



4.7 Table 4.2 provides a detailed breakdown of retail, office, factory and warehouse spaces within the above (BBNPA) MSOAs (excluding W02000252, W02000315 and W02000285).

4.8 These MSOAs are shown to provide some 2,248 units, of which 44% are retail units, 23% are factory units, 20% are offices and 13% are warehouse units.

Table 4.2 Breakdown of Employment Space in Brecon Beacons National Park

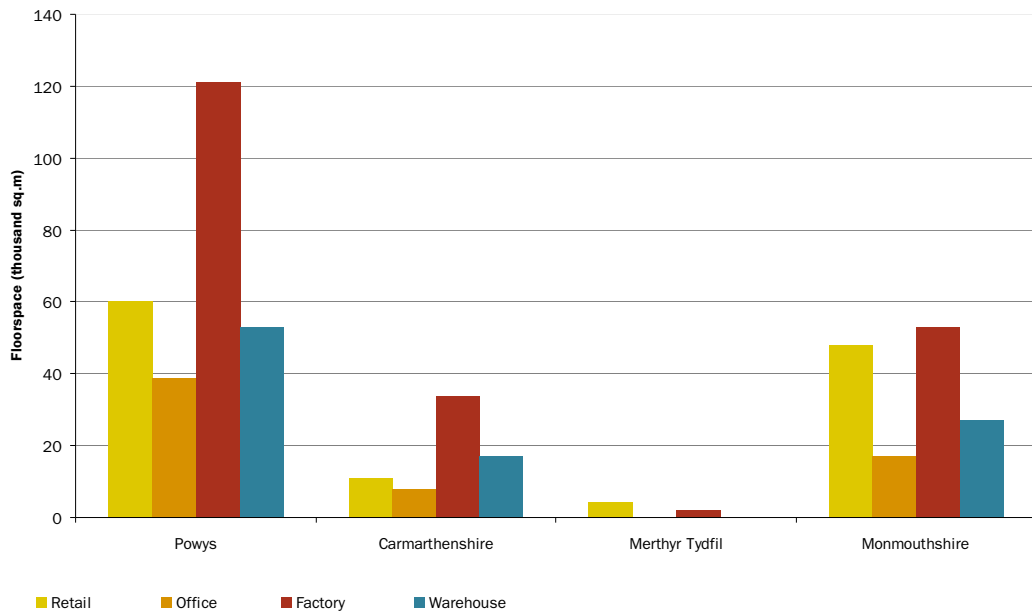
<i>Business Unit</i>	<i>No. Units</i>	<i>Total Space (sq.m)</i>	<i>Average Unit Size (sq.m)</i>
<i>Retail</i>	888	123,000	139
<i>Offices</i>	427	64,000	150
<i>Factories</i>	481	210,000	437
<i>Warehouses</i>	263	97,000	369
<i>TOTAL</i>	<i>2,059</i>	<i>494,000</i>	<i>240 (overall average)</i>

Source: Office of National Statistics sourced via Valuation Office Agency (VOA)

4.9 Whilst the predominance of retail units within the National Park (in terms of number) is noted, an examination of the floorspace breakdown shows that they account for just 25% of floorspace, indicating a relatively small average size. By contrast, 43% of the VOA employment floorspace is shown to be used for factories. Office and warehousing floorspace is shown to account for 13% and 19% of the total in the Brecon Beacons.

4.10 The spatial distribution of this floorspace around the National Park is shown in Figure 4.2 below. This Figure shows the MSOAs within Powys account for 58% of the National Park's factory floorspace. The Powys component is also shown to contribute the highest floorspace figures in relation to retail, office and warehousing. Given that Powys accounts for the largest part of the National Park both in terms of geography and population and contains the National Park's key settlements, this is unsurprising.

Figure 4.2 Distribution of Employment Floorspace across the BBNPA

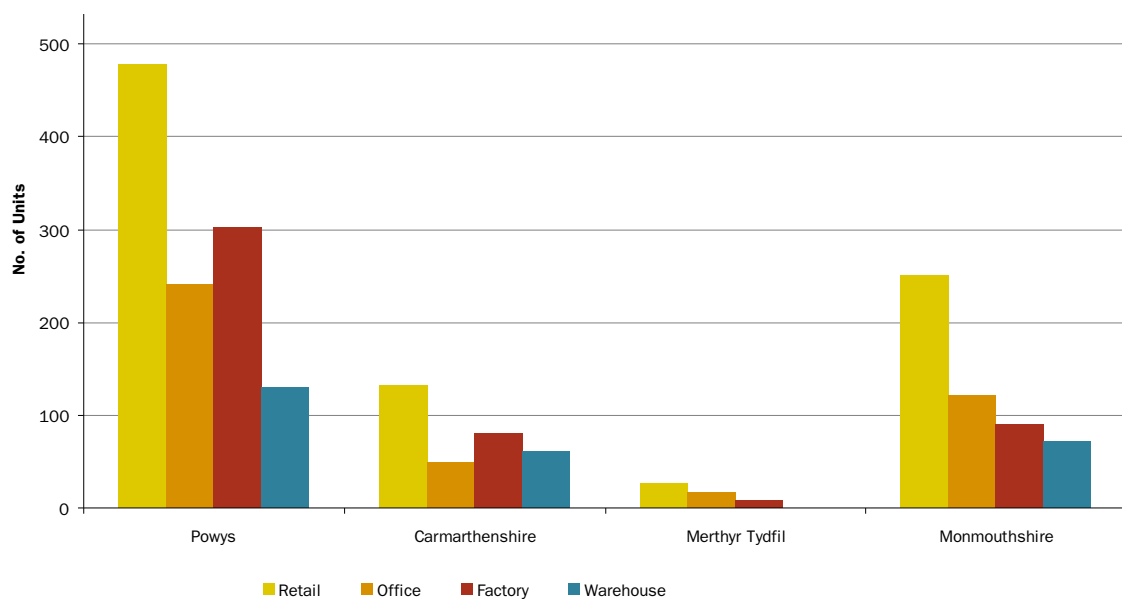


Source: NLP analysis of Office of National Statistics sourced via the Valuation Office Agency (VOA)

4.11

By way of comparison, the spatial distribution of employment units is shown in Figure 4.3 below. Similar to the distribution of floorspace, the Powys component of the Brecon Beacons National Park is shown to provide a significant proportion of the National Park’s office, factory and warehouse units. However the high number of retail units in the National Park is clearly shown in all component LPAs, with Monmouthshire and Powys providing a large proportion of the National Park’s retail units.

Figure 4.3 Distribution of Employment Unit Numbers across the BBNPA



Source: NLP analysis of Office of National Statistics sourced via the Valuation Office Agency (VOA)

4.12

This evidence shows the importance of factories and non B uses such as retail in the BBNPA economy. Factories account for 43% of the BBNPA employment floorspace and although retail uses account for less floorspace (25%), this use provides for 43% of the National Park’s employment units. As shown in chapter 8, despite the large amount of industrial floorspace, the manufacturing industry is expected to decline in importance in the future.

Size of Units

4.13

The Brecon Beacons National Park is characterised by small business premises. Table 4.3 below shows the average BBNPA unit sizes compared with the Welsh average unit sizes.

Table 4.3 Average Unit Sizes in BBNPA compared with Wales average

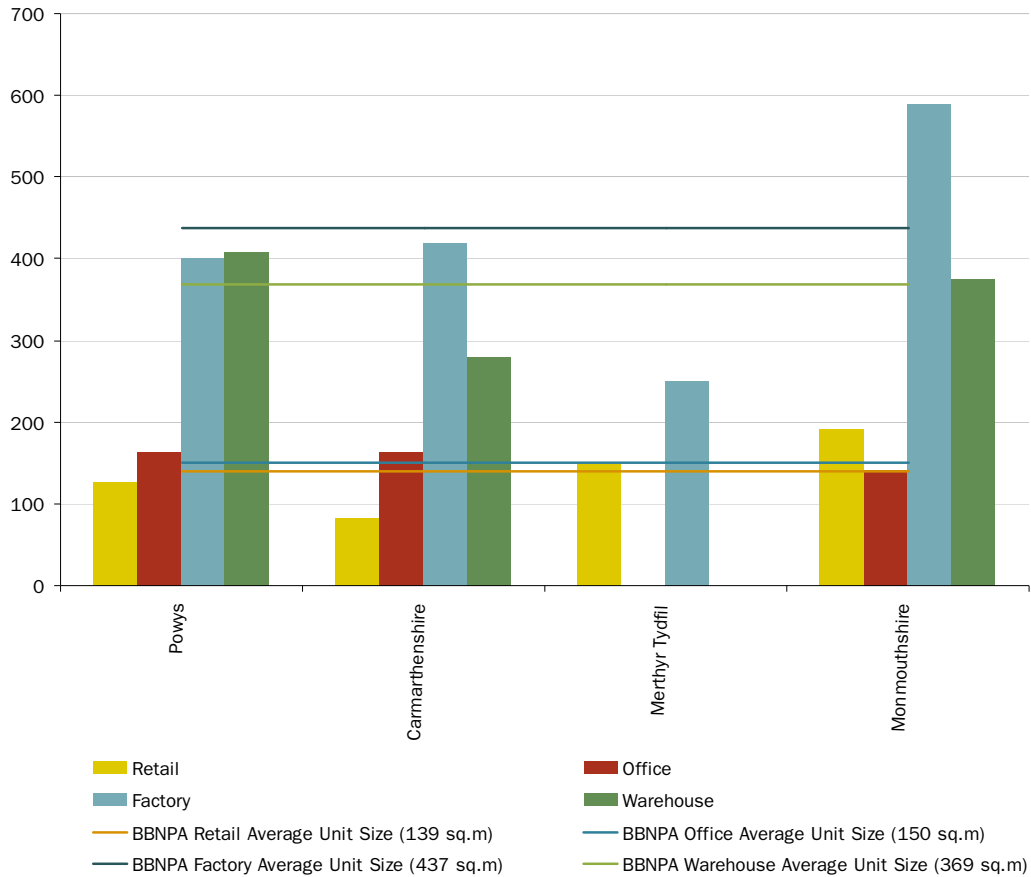
Use Class	BBNPA Average Unit Size (sq.m)	Wales Average Unit Size (sq.m)
Retail	139	196
Office	150	251
Factory	437	1,007
Warehouse	369	567

Source: NLP analysis of Office of National Statistics sourced via the Valuation Office Agency (VOA)

4.14

In all four use class categories BBNPA’s unit sizes are smaller than the Welsh average with the factory unit sizes within the BBNPA being particularly small – around half the size of the Welsh average.

Figure 4.4 Average Unit Sizes



Source: NLP analysis of Office of National Statistics sourced via the Valuation Office Agency (VOA)

4.15

Although despite their small size and reasonably limited number, there is no evidence that the current supply of employment space in the Brecon Beacons National Park is having any adverse impact upon the local economy. The area is not anticipated to attract large levels of future inward investment and therefore the National Park’s range of sites should not seek to focus on serving such needs. Instead, the economy is characterised by smaller scale companies. This is reflected in – and serviced by – the nature and the level of provision of small premises.

4.16

The quality of the existing employment stock is considered in detail in chapter 6.

Vacancy rates

- 4.17 BBNPA undertook a survey in May 2010 to inform an Addendum to Employment Issues Paper. This sought to quantify the current vacant units within the existing employment sites. It concluded that there were approximately 2,700 sq.m (10 units) of vacant employment floorspace within the National Park. This vacant floorspace was located at:
- 1 Brecon Enterprise Park,
 - 2 Ffrwdgrech Industrial Estate; and
 - 3 Talgarth Business Park.
- 4.18 The Addendum also surveyed vacant floorspace within settlements which are immediately adjacent to the National Park, for example Ystradgynlais, Aberdare, Hirwaun and Abergavenny. The survey concluded that there were 23 vacant units, totalling some 64,450 sq.m of floorspace in such settlements.
- 4.19 By way of contrast and to show change over time, the September 2010 Employment Issues Paper, recorded that 12 vacant units exist within Industrial Estates within the National Park. This was calculated as accounting for 11.1% of the overall (A1, B1, B2, B8, D1 and Sui Generis) units within these Sites (see part 5.1 of Issues Paper for further details).

Existing Employment Land Provision

- 4.20 Having considered the current context in Brecon Beacons National Park in terms of the supply of business premises, this section reviews the current supply of employment (B uses class) land provision as well as non B use class sources of employment (principally agriculture and tourism). It is based upon the information that has been made available to the study team by Brecon Beacons National Park Authority. This information comprises:
- 1 A schedule of planning applications relating to employment uses (B use classes, agriculture and tourism) that were approved between 2001 and 2011;
 - 2 A schedule of planning applications relating to employment uses (B use classes, agriculture and tourism) that were refused between 2001 and 2011; and,
 - 3 A schedule of employment (B use class) floorspace losses between 2001 and 2011.
- 4.21 The team has not been afforded the opportunity to verify the information that has been provided and which is set out in our analysis below.

Planning Permissions

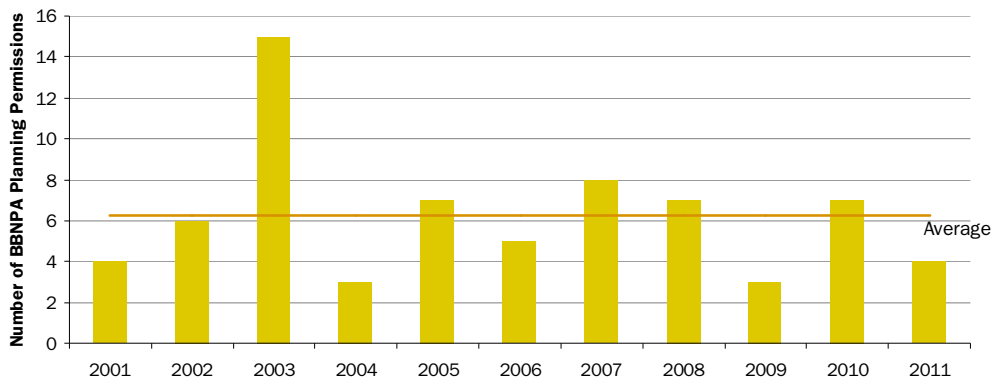
- 4.22 According to the information that has been provided by BBNPA, a total of 69 planning applications relating to employment uses (B use classes) were approved between 2001 and 2011. This compares to 80 planning approvals

relating to agriculture and tourism over the same 11 year period (an average of between 7 and 8 planning applications per year).

B Class Uses

4.23 The B Class planning permissions that have been granted relate to a range of uses including new light industrial floorspace, storage, factory and office floorspace. It is noted that a large amount of these planning applications related to extensions to existing premises.

Figure 4.5 Employment (B use class) planning permissions (2001-2011)



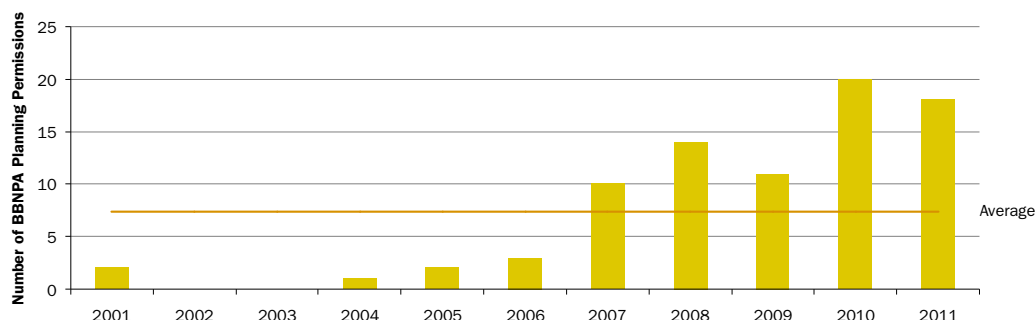
Source: BBNPA planning application database

Non B use classes

4.24 BBNPA has provided planning application data relating to agriculture and tourism approvals between 2001 and 2011. It is intended that this data will provide an indication of the associated trends and importance of these non-B use classes for the BBNPA.

4.25 Figure 4.6 shows the number of tourism and agricultural approvals to have increased gradually over the 11 year period, with a peak of approvals being in 2010 (20 planning approvals).

Figure 4.6 Tourism and Agriculture planning permissions (2001-2011)



Source: BBNPA planning application database

4.26 Of the 80 planning approvals, a fairly even split exists between agriculture and tourism uses. Of those planning applications approvals which were monitored:

- 1 80% related to new build development;
- 2 20% related to conversions or change of uses. The number of conversions is higher than experienced in relation to B use class approvals, although it is noted that this increase is largely attributed to the higher instances of conversions in relation to tourism applications (28%).

4.27 The recorded tourism applications mostly relate to conversions to create self-catering cottages, bespoke new tourism applications in relation to e.g. renovation of a Water Mill or extensions to existing tourism facilities. The agricultural applications related mostly to new build/extensions to agricultural sheds.

Planning Refusals

B use classes

4.28 The information provided by the Brecon Beacons National Park Authority indicates that only 5 planning applications relating to B Class Uses were refused between 2001 and 2011. We provide some information on these individual planning applications below:

- 1 **LPA Ref No: P17211** sought permission to demolish an existing building and construct a replacement with 3 no. industrial units at the Old National Tyre Depot, Priory Hill, Brecon. This was refused due to the intensification of an industrial use in a predominantly residential area and also impact upon the Brecon Conservation Area and nearby Listed Buildings. This decision is important in highlighting the need to balance considerations in relation to economic development and residential amenity.

- 2 **LPA Ref No: P18017** sought permission for a temporary office building at Aberdydach House, Aber, Talybont-on-Usk. The main reason for refusal related to design considerations.
- 3 **LPA Ref No: P20800** sought permission for a factory unit at the rear of units 13/14 Ffrwdgrech Industrial Estate, Brecon. This was refused on the basis of mass, scale, siting and highways issues. However the economic advantages of establishing a further industrial unit on the Estate were welcomed. Both the application in Aber and this planning application highlight the importance of design considerations in the planning balance within the highly sensitive National Park environment.
- 4 **LPA Ref No: M20716** sought permission to convert an existing barn into offices at Pen y Park, Llanfihangel Crucorney. This was refused on highways grounds. This highlights the issues posed by business premises within the rural area.
- 5 **LPA Ref No: M20658** sought permission for a number of self-storage containers at New Court Farm, Llantilio Pertholey. This was refused on the basis of siting, scale and appearance of the industrialised form of development, which was considered out of character with the existing rural, agricultural setting. Concerns were also raised regarding traffic generation.

4.29 These decisions all highlight the need to achieve an adequate balance between environmental protection and economic development within the National Park.

Non B uses classes

4.30 The number of planning refusals of non B uses was significantly higher than that shown for B use classes. 39 planning application were refused, compared with 5 for B class uses. Of these 39 planning applications, around 60% related to agriculture, mostly relating to new build agricultural sheds. Common reasons for refusal include visual amenity, landscape impact and lack of demonstrated agricultural need.

Permitted Loss of (B Use Class) Employment Space

4.31 The BBNPA database of planning applications indicates that 3 proposals were permitted between 2001 and 2011 that sought the reuse or redevelopment of B Class premises for non-B Class activities. None of these are located within the National Park's existing Industrial Estates.

- 1 **Ref 09/03948/FUL:** The Change of use of an office and storage barn to self-catering accommodation at Ynys Marchog Farm, Trecastle, Brecon was permitted in March 2010. The Committee Report refers to UDP Policy ES1 and ES8. UDP Policy ES1 set out the circumstances in which a change of use of an existing commercial site to a non commercial use will be considered acceptable. UDP Policy ES8 establishes the circumstances under which proposals for the conversion of rural buildings outside the

development boundaries for appropriate commercial uses will be permitted.

The Committee Report established that the proposed self-catering use was an appropriate commercial use and therefore the change of use from offices was considered acceptable.

- 2 **Ref P19142:** Conversion of existing office accommodation to new Police Station and custody suite extension at the Former Hyder Building, Cambrian Way, Brecon, Powys was approved in September 2003. Only the custody suite extension aspect required a change-of-use and this was considered appropriate on balance.
- 3 **Ref 09/03946/FUL:** The change of use of a barn formerly used as health food warehouse to swimming pool for use with self catering business at Ynys Marchog Farm, Trecastle was permitted in April 2010. The Committee Report refers to UDP Policy ES1 and ES8. It concluded that the proposed (ancillary) self-catering use was an appropriate commercial use and therefore the change of use from a warehouse was considered acceptable provided it was used solely with the self-catering business.

4.32 The fact that only 3 approvals for the loss of employment space have been allowed in the last 11 years and that none of these were located in any of the existing industrial estates suggests there is limited pressure on the existing employment portfolio for redevelopment to non B uses. It also illustrates the strength of existing policies (such as UDP Policy ES1) that seek to retain existing commercial land for economic purposes.

Conclusion

4.33 The current supply of employment land in the BBNPA reflects the nature of the local economy, which is characterised by a strong presence of non-B uses such as agriculture and tourism, and pockets of relatively small B use class units.

4.34 New employment related development in the BBNPA has also been limited since 2001, with only 69 planning approvals, again reflecting the character and nature of the local economy. This is compared with 80 planning approvals in relation to tourism and agricultural uses, potentially reflecting the importance of these uses for the BBNPA.

B Class uses

4.35 The B Class planning approvals relate to a range of uses including new light industrial floorspace, storage, factory and office floorspace. It is noted that a large amount of these planning applications related to extensions to existing B Class premises.

4.36 The limited number of refusals of applications for B Class developments and the limited loss of B Class floorspace should also be noted. The small numbers involved is perhaps indicative of the BBNPA's policy stance, which seeks to protect existing employment land but may also be reflective of a limited

demand for existing B use classes to be redeveloped into alternative uses. Nevertheless, continuing a policy within the LDP which seeks to protect against the loss of employment use will be important in order to continue to preserve the economic wellbeing of BBNPA.

Non B uses

- 4.37 80 planning approvals relating to tourism and agriculture uses were reviewed. The agricultural approvals mostly related to new build agricultural sheds and many of the tourism applications related to the conversion of barns to holiday-lets and extensions to existing tourism facilities. It was interesting to note that a relatively high number of refusals relating to agricultural new build agricultural sheds, with common reasons for refusal relating to visual amenity, landscape impact and lack of demonstrated agricultural need. This illustrates the difficulty in striking a balance between protecting the environment and supporting the local economy.
- 4.38 Agriculture and tourism will continue to be important sectors for the BBNPA local economy and environment and it will therefore be important that planning policies continue to support these industries, subject to appropriate criteria relating to design and siting etc.

Consultation

Introduction

- 5.1 Consultation with a range of agents, stakeholders and local businesses is an essential element of the ELR process. An extensive programme of consultation was undertaken in order to understand the main local economic issues that exist within BBNP and to ensure that these could be adequately accounted for in planning for the future economic development and the continued economic well being of the area.
- 5.2 In addition to discussion with individual agents and stakeholders we also consulted with tourism and agricultural businesses and neighbouring Local Planning Authorities. This chapter provides a summary of the key findings of these consultation exercises which have informed the analysis and recommendations set out in this report.
- 5.3 The responses that were received from this exercise represent the views of both companies and individuals.

Agent Interviews

- 5.4 An understanding of the strength of the local market conditions and the strength of the particular economic sectors is central to being able to assess the existing demand for B class space and the likely future land requirements. Our understanding of the local market was informed by consultation with 4 local property agents. Our discussions focussed on the level of sales and rental activity within different property sectors, the broad locational distribution of demand and the anticipated future trends and requirements.
- 5.5 In our experience of undertaking ELR's, consultation with agents provides the opportunity for a detailed understanding of key local market issues. This approach is vital in BBNP given the small scale economy present and the relatively limited demand for premises. The agents consulted are either based or operate within the National Park.

Strength of the B Class Market

- 5.6 All of the agents stated that the current economic conditions are having a considerable impact upon the market conditions in general due to the lack of finance available from the banks in terms of support to businesses to enable growth. However, a number of agents also confirmed that whilst the general market conditions nationally were poor, Brecon Beacons NPA has been fairly sheltered from the extreme economic lows given the particular nature of the local market which is dominated by home-grown, local SME businesses.
- 5.7 Many of the agents also raised concern that the lack of start up premises were restricting economic growth as competition for those units meant that purchase

prices for the units that were available were artificially high. It was also noted by a few local agents that there were a lack of follow-on units for start up businesses that wished to expand to move into. However, given the current market conditions, they acknowledged that it is currently difficult to assess the number of follow-on units that are required but it was envisaged that this number would be in the region of 10-30 follow on units as opposed to 100. A couple of agents had said they had, prior to the economic down turn, about 10 companies looking to expand, but since 2009 /10 these companies have not renewed their interest in re-locating to larger premises.

- 5.8 All agents commented that if further land of the correct size and scale was available then land prices would become more realistic and there would be movement in the employment market.
- 5.9 None of the agents commented that transport links were seen as a major drawback to businesses locating to BBNP. Most agents stated that businesses in Brecon were either 'home-grown' in nature or were seeking to locate to Brecon for 'lifestyle' reasons. The only other type of businesses that located to Brecon are those that are linked to the existing tourism or agricultural industries.
- 5.10 It was clear from discussions with agents that further offices are not required, although it is noteworthy that a few stated that a number of the older, conversion style offices did not comply with DDA and many could not be altered due to accommodate DDA requirements. It was also noteworthy that agents commented that buildings that were converted from either residential or agricultural use to employment use were generally more expensive in terms of purchase or rental values due to the inherent cost of conversion against new build. This in turn means that conversions tend not to be priced at a level conducive to encouraging occupation by start-up or small, local businesses.
- 5.11 Through the consultation process it is clear that whilst there are employment sites available they are too large for the majority of businesses that are looking to relocate to Brecon or existing businesses that are looking to expand into new premises. There appears to be little demand for sites of over 5ha in size but there is demand for employment sites of c. 0.5ha. It was also noted by agents that there is little demand for premises from national or international companies seeking to locate within BBNP. To this end, most consultees stated that those businesses that were reliant on companies and trading partners elsewhere in the UK tended not to be based in BBNP and would be found in more accessible locations. As such the larger scale sites that have historically been allocated to try to attract these types of businesses are not required. This is borne out by the number of service sector businesses as opposed to the larger industrial, storage and distribution or manufacturing types of businesses. Whilst there is a clear role for the manufacturing industry within BBNP it is typically of a bespoke or niche nature.
- 5.12 The hotspots for businesses, in terms of location, appear to be the main market towns of Brecon and Hay-on-Wye. Whilst these are the known hotspots,

allocated employment land and site availability in these locations are limited thus creating artificially high land values within the area for employment land.

It is accepted that there are less expensive location neighbouring BBNP such as Merthyr and RCT, but it is apparent from agents that those businesses seeking to locate or expand within Brecon do so for lifestyle reasons or the niche market conditions as opposed to cheaper land prices or a better road network. Moreover, the Heads of the Valleys market area is separate to the BBNP employment market. The Heads of the Valleys area is more competitive for the larger national businesses looked for the larger, cheaper premises and better road and travel links but most consultees stated this was not the type of business that is generally looked to locate in Brecon anyway.

- 5.13 Many local businesses, such as those in operating in the retail and service sector (including solicitors, financial services etc) are thriving and the agents have had a couple of calls from these business sectors seeking to expand but have been unable to do so due to lack of availability of the right sized units in the right location. One other factor has been the lack of purpose built office space available for the service sector, as much of the office space available is older in nature and generally is an old residential unit which has been converted to office space. These units, according to the agents are often difficult to lease / let as they do not comply with modern business requirements or meet disabled access requirements.
- 5.14 Of those businesses seeking to expand, they are generally looking for new premises within a few miles of the existing unit to ensure minimal impact on employees commute to work. Many businesses would welcome the opportunity to expand their existing premises to accommodate business growth rather than seek to purchase new premises.
- 5.15 One overriding factor that was apparent from discussions is the need to balance the requirement for new employment land and the need to protect and conserve the National Park and the environs. That said, it is clear that a degree of flexibility need to be introduced to all businesses to locate in the areas that that allow for economic growth and business success.
- 5.16 Agents stated that there was a need for new 'start-up business estates' with good parking in accessible and sought after locations. An example that was quoted was the former WDA scheme in Ffrwdgrech, where all units were let very quickly, however since the WDA sold the site and the individual units have been sold, the nature of the site has lead to units changing hands at higher than market value and as such small and new businesses are unable to afford the purchase or rental prices.
- 5.17 We were also informed by one agent that the vacant units on the Brecon Enterprise Park were difficult to let due to the proximity of the gypsy site, even though they are available for occupation and there is an established need.
- 5.18 Following consultation with agents it is clear that there is demand for B-Class employment space within BBNPA as long as it is of the correct nature, size and in an accessible location.

Agriculture and Tourism

- 5.19 It was recognised by all agents that both the agricultural and tourism sectors played a large role in the economic market within BBNP.
- 5.20 Most of the agents we spoke to stated that whilst there is a market for agricultural farm premises these are generally being purchased as lifestyle choice properties from people outside of the local area. The large farms that have been coming to the market recently have been sold as small holdings with surplus land being rented to adjacent farms or for private equestrian or grazing uses.
- 5.21 Farm diversification also seems to be prevalent within the National Park, with many farms looking to diversify so that there were not solely reliant on an agricultural income. Diversification appears to be into a number of different sectors with tourism being the most common and including conversion of outbuildings into holiday lets, outdoor pursuits etc.
- 5.22 Whilst there is a clear tourism sector and market in BBNP, agents commented on the seasonal nature of the sector and the effect that this seasonality has on the local economy generally. One agent commented that a number of tourism based businesses were struggling out of season more than in previous years due to the current economic climate. However, it is clear that the tourism industry is a key business sector within BBNP and will continue to be so.
- 5.23 It was also noted by a number of agents that the agricultural services sector i.e. feed shops, agricultural vehicle maintenance companies are looking at a wider market area than they had to historically.

Live-Work Units

- 5.24 None of the agents consulted stated that there was a market for live-work units within BBNP. Whilst there are a number of mail order companies operating within the National Park they tend to operate from small employment units or from home. Agents are however seeing a growing demand for larger residential units or small holdings with buildings for conversion. This demand is to meet the growing 'working from home' trend that many companies now operate at a national and local level. The prevalence of home working was also highlighted in our consultation with local businesses.

Business Interviews

- 5.25 As part of the consultation exercise for this Employment Land Review we spoke to a number of key local businesses operating within the National Park. The majority of businesses we spoke to are located to Brecon due to its importance within the National Park and the lifestyle associated with living in the National Park.

- 5.26 Nearly all respondents stated that the premises that they were currently located in were of good quality and that the location within BBNP was a good location for business activity.
- 5.27 Many of the respondents had close links to the National Park, or the wider area and often this formed the basis for choosing to locate within the National Park area. It was stated that if they were to expand they would look for new premises within BBNP and many would look to remain within the immediate vicinity of their existing premises. A number of the businesses that we spoke to also stated that being located within the National Park was helpful to the business in terms of marketing material as it often had perceived connotations of a niche and bespoke service or goods which complimented the business.
- 5.28 Following on from this many businesses that we spoke to stated one reason for staying in the vicinity of the existing location when seeking larger premises would be the distribution of staff as a key factor in any relocation. Staff retention is a key issue with certain business sectors being concerned about finding staff with the requisite skill set and qualifications. The importance of continuing to invest within existing educational institutions was emphasised in order to ensure people with the adequate skills set are available for businesses within the National Park.
- 5.29 Whilst businesses did not appear to be overly concerned about transport links within BBNP for staff commuting, the infrequency of public transport links to key railway stations is of concern to certain business sectors whose clients travel into the National Park for meetings. More sustainable public transport links need to be provided to enable sustainable travel options are available for business travel within the park and the surrounding environs.
- 5.30 As well as transport links, another key aspect of business infrastructure is broadband connectivity. A number of internet and IT based businesses that are located within BBNP have stated that broadband connectivity is a key issue which needs to be addressed as it is a hindrance to business expansion.
- 5.31 A number of smaller towns, especially those in gateway locations to the Park have felt neglected by BBNPA in the past but this has altered in the last few years with greater support from BBNPA in terms of business networking opportunities and collaborative working between businesses across the national park. These networking opportunities have help to strengthen both businesses and business relationships within the National Park, this in turn has lead to a greater dwell time for visitors within BBNP.
- 5.32 Further support however is needed for existing businesses to provide guidance and advice on business growth and opportunities. Issues were raised in relation to business grants that are available for businesses to start up, but those existing business that have survived the current economic crisis and are now looking to expand have no grant support or assistance from the unitary authority. This can often lead to resentment within towns between businesses with existing businesses feeling that they have created a quality environment that attracts new businesses and it is those new businesses that have the

support and grant assistance with no recognition given to those existing businesses.

5.33 In many areas it was noted that retail was dominant in the towns and villages, however vacant units were available in many towns. In certain towns, Chambers of Commerce are working to try and set up these vacant units as live-work units for new start-up businesses to help increase the vibrancy of the towns, although this should be set against the comments from agents regarding the level of demand for live-work units.

5.34 Other factors that were noted as being barriers to business expansion and start up were defined as:

- 1 Perceptions and lack of actual flexibility within the planning process – this is often a concern in National Parks where a careful balance must be drawn between the environment and other factors;
- 2 Lack of suitable premises;
- 3 Lack of support for existing businesses;
- 4 Rents and land values too high;
- 5 High service charges; and,
- 6 Bureaucracy.

Tourism and Agricultural Businesses

5.35 Many local businesses are reliant on the tourism trade that is associated with BBNP. Many areas within the BBNP are trying to increase the tourism market and market towns and villages are seeking to increase their attractiveness to tourists. A number of Chambers of Commerce are undertaking various schemes with the assistance of various partners to encourage tourism including:

- 1 Ensuring quality and consistency of service;
- 2 Brecon Beacons Excellence Scheme – to take pride in the National Park;
- 3 Holding festivals and carnivals to draw tourists in to towns;
- 4 Encourage retail units and businesses to stay open longer; and,
- 5 Holding workshops to encourage community and tourism engagement.

5.36 The increased business networking throughout the National Park is helping to drive the tourist trade within the National Park. By stocking local produce or supporting local manufacturing businesses throughout the area, retailers and businesses are helping to educate tourists about other attractions and areas of the National Park and encouraging linked trips and extending dwell time.

5.37 Concern was raised in certain areas with regard to the lack in small independent hotels and bed and breakfasts in certain towns to increase tourism. In addition, concern was also raised over the lack of restaurants in towns and villages which would increase dwell time and help to promote tourism.

5.38

Despite recent reductions in employment levels and a continued trend towards diversification, agriculture is still dominant within BBNP with many spin off businesses and services linked to the agricultural sector. The growing trend for farm diversification has lead many farms to diversify into the tourism trade either through conversion of outbuildings to holiday lets or through creating tourist attractions and activities such as quad biking, horse riding etc. These alternative tourism uses have assisted in increasing the tourism sector as well as offering an alternative income to agriculture which helps to boost farming income.

6.0

Qualitative Assessment of Existing Employment Sites

6.1

This chapter assesses the characteristics of the existing B Class sites within Brecon Beacons National Park. This assessment has been based upon desktop analysis and site visits. It has been undertaken by NLP in its capacity as town planning consultant and no specialist input has been sought to inform the site assessment process.

6.2

The DCLG guidance note on employment land reviews recommends that only 'significant' employment sites should be assessed and sets a general standard of 0.25 hectares as an appropriate size threshold upon which decisions can be made regarding which sites should be assessed by the study. However the National Park represents a unique case and its employment sites are generally of a small scale therefore it has been appropriate for our analysis to consider sites that fall below the recommended threshold contained within the DCLG guidance. Therefore no minimum site threshold was set for the assessments.

6.3

The National Park Authority identified the employment sites for assessment and members of the study team undertook the site visits and assessments based upon the broad criteria set out in Table 6.1. This criterion is based upon those set out in the DCLG guidance, albeit that they have been adapted to ensure that they can be relevant to the local situation in the Brecon Beacons National Park.

6.4

Only those sites which were identified by the Authority as currently accommodating B-class uses were surveyed. It is recognised that not all premises within the National Park have been reviewed but the analysis contained within this chapter does provide a clear overview of the current issues and themes relating to the existing portfolio of sites and premises available in the Brecon Beacons National Park.

Table 6.1 Site Assessment Criteria

a. Access	<ul style="list-style-type: none">i. Road accessii. Public transport accessiii. Public/cycle access
b. Site Context	<ul style="list-style-type: none">i. Proximity to residential area/community facilitiesii. Brownfield/greenfield statusiii. Adjoining usesiv. Relationship with built environment

	v. Proximity to infrastructure
c Environment:	<ul style="list-style-type: none"> i. Landscape sensitivity ii. Opportunity to remove an eyesore iii. Ecology iv. TPOs v. Topography vi. Contamination vii. Flood risk viii. Water quality ix. Impact on agricultural land
d Availability and Deliverability:	<ul style="list-style-type: none"> i. Viability ii. Site ownership iii. Pressures for other forms of development

Source: NLP Analysis

- 6.5 Appendix 3 includes a matrix setting out guidelines on how each category was assessed.
- 6.6 The outcome of this review was that each site was assessed in relation to each criterion between -- (very poor) and ++ (very good). Then based on the individual scaling given to each category, an overall scale was given for each site.
- 6.7 The purpose of this scaling is to indicate the better performing attributes of sites relative to others in the National Park. Although this comparative assessment is helpful in understanding the relative qualities of different employment sites it is important to note that a site that is identified as being 'poor' (-) according to one criteria does not necessarily mean it should be classed as a 'poor' site overall. This is because some criteria may be more important than others in determining its suitability for existing employment uses and possible future expansion.
- 6.8 Moreover, even if some existing employment sites do not perform well against the criteria, an assumption should *not* necessarily be made that the site should be released for alternative purposes, as such sites may indeed still perform an important contribution to the local economy.

Findings – existing employment sites

6.9 A total of 9 existing B use class employment sites were assessed. A full summary of the results are included in Table 6.3 overleaf and the detailed site proformas (including location plans) are included in Appendix 2.

6.10 The individual scores that were applied to each criterion were drawn together into an overall score. Table 6.2 includes a summary of these overall scores and a breakdown of these are included below:

- 1 Very good (++): 4 sites;
- 2 Good (+): 2 sites;
- 3 Average (0): 3 sites;
- 4 Poor (-): 0 sites; and,
- 5 Very Poor (- -): 0 sites.

Table 6.2 Overall BBNPA Existing Employment Site Scores

Level	Site	Area (Ha)	Overall Score
1	BREC 1 Enterprise Park	6.2	++
	BREC 2 Ffrwdgrech Ind. Estate	12.6	++
2	TAL1 Talgarth Bus. Park	1.6	++
	CRICK1 Elvicta Bus Park	2.6	0
	CRICK2 Granada Park	2.7	0
	HAY1 Wye Valley Bus. Park	2.4	++
	HAY5 Greenfield Ind. Est.	0.6	+
	SENNY1 Timber Yard	1.6	0
3	GIL1 Gilwern Park Ind. Est.	4.2	+

6.11 The groupings have been based upon an overall view of the sites in the context of the National Park. Commonalities can be seen between sites in each category. For example, the sites categories as ‘very good’ (++) tend to be located in the largest settlements and benefit from good strategic access to ‘A’ roads, whilst more ‘average’ (0) sites tend to be more dispersed and suffer from problems relating to their strategic and local access.

Table 6.3 Qualitative Analysis of Existing Employment Sites in BBNPA

Settlement Hierarchy	Site	Access			Site Context					Environment									Availability and Deliverability		
		Road Access	Public Transport Access	Pedestrian/cycle Access	Proximity to residential areas & community facilities	Brown/Greenfield	Adjoining Uses	Relationship with Built Environment	Proximity to Infrastructure	Landscape Sensitivity	Removal of eyesore?	Ecology	TPOs	Topography	Contamination	Flood Risk	Water Quality	Impact on Agricultural Land	Viability	Ownership/site availability	Pressure for other forms of development
1	BREC 1 Enterprise Park	++	-	-	0	+	+	++	++	++	0	++	++	++	++	++	0	++	-	++	++
	BREC 2 Ffrwdgrech Ind. Estate	++	-	-	0	0	+	++	++	++	0	++	++	++	++	++	-	++	-	++	++
2	TAL1 Talgarth Bus. Park	++	-	++	+	++	+	++	++	++	0	++	0	++	++	++	+	++	+	++	++
	CRICK1 Elvicta Bus Park	++	0	0	-	++	--	--	++	++	0	++	++	++	++	+	++	0	0	++	
	CRICK2 Granada Park	++	--	-	-	++	--	--	++	++	0	++	++	++	++	+	++	0	+	++	
	HAY1 Wye Valley Bus. Park	++	-	0	-	++	+	++	++	++	0	++	++	++	++	+	++	+	++	++	

		Access			Site Context					Environment									Availability and Deliverability		
Settlement Hierarchy	Site	Road Access	Public Transport Access	Pedestrian/cycle Access	Proximity to residential areas & community facilities	Brown/Greenfield	Adjoining Uses	Relationship with Built Environment	Proximity to Infrastructure	Landscape Sensitivity	Removal of eyesore?	Ecology	TPOs	Topography	Contamination	Flood Risk	Water Quality	Impact on Agricultural Land	Viability	Ownership/site availability	Pressure for other forms of development
	HAY5 Greenfield Ind. Est.	+	-	0	+	++	+	0	++	++	0	+	++	++	++	++	++	++	0	+	++
	SENNY1 Timber Yard	--	0	-	++	++	-	++	++	++	0	++	++	0	++	++	+	++	0	+	++
3	GIL1 Gilwern Park Ind. Est.	++	-	0	0	+	0	-	++	++	0	++	++	++	++	++	+	++	0	+	++

Source: NLP Analysis

Overview of Existing Employment Sites

Very good sites (++)

- 6.12 Very good sites mainly have good access to the strategic road network which, due to the distance from the M4 motorway, has been classed as the 'A' roads. 3 out of 4 sites are located either immediately adjacent to an A road. The remaining site in Hay-on-Wye is located immediately adjacent to a good quality B-road, which provides a key route into one of the National Park's level 2 settlements.
- 6.13 The very good sites were generally located in areas that are attractive to the market primarily due to their location within the National Park's Level 1 and 2 settlements of Hay-on-Wye, Talgarth and Brecon. These sites are mostly located in prominent areas, which were physically related to the urban form of the settlement, allowing a readily available access to labour and services. Very good sites generally provided high quality premises, which were considered attractive to the market and also neighbouring uses were generally appropriate for a business/employment related activity.

Table 6.4 'Very Good (++) Sites

Level	Site	Overall Score
1	BREC 1 Enterprise Park	++
	BREC 2 Ffrwdgrech Ind. Estate	++
2	HAY1 Wye Valley Bus. Park	++
	TAL1 Talgarth Bus. Park	++

Source: NLP Analysis

- 6.14 All the very good sites are located outside of areas that are highlighted in Brecon Beacons National Park Authority's Strategic Flood Risk Assessment as being constrained by Zone C2 flooding. 3 of the 4 sites identified also have some capacity to expand in the future (either through development of a plot or through occupation of a vacant unit), within the existing site boundaries.

'Good' Sites (+)

- 6.15 Good sites also generally benefited from good access to the strategic road network, being located either immediately adjacent to a good quality B road, or within a few hundred metres of one. They also benefited from relatively good access to services and labour, being located on the edge of the National Park's Level 2 or 3 settlements.

Table 6.5 'Good' (+) Sites

Level	Site	Overall Score
2	HAY5 Greenfield Ind. Est.	+
3	GIL1 Gilwern Park Ind. Est.	+

Source: NLP Analysis

6.16 Premises were identified to be of a reasonably good quality and neighbouring uses, were largely considered to be acceptable given the current employment uses on the site in question.

6.17 Both sites did not have any major physical constraints and they generally had some potential to accommodate some future expansion either through development of vacant plot or through occupation of an existing vacant unit.

'Average' Sites (0)

6.18 All three sites identified are located in Level 2 Settlements.

6.19 The employment sites that have been identified as being average quality generally have reasonable access to the strategic road network – all 3 being located within a few hundred metres of an A-road. However in the case of the Timber Yard, the site's access was severely constrained and their proximity to sensitive residential uses was noted to potentially generate some bad neighbour impacts, especially related to noise associated with the on-site timber mill. This location was considered to be a particular constraining factor for its future use.

6.20 Conversely, both Elvicta and Granada Parks were noted to be physically separated from the neighbouring settlements, surrounded by open countryside, and therefore relatively isolated from a labour supply and local services. In addition to this, both sites exhibited flood risk constraints.

Table 6.6 'Average (0) Sites

	Site	Overall Score
2	CRICK1 Elvicta Bus Park	0
	CRICK2 Granada Park	0
	SENNY1 Timber Yard	0

Source: NLP Analysis

'Poor' Sites (-) and 'Very Poor' (- -) Sites

6.21 None of the existing employment Sites were identified as poor or very poor, despite some individual criteria being categorised as such.

Site potential to accommodate waste facilities

- 6.22 BBNPA requested we consider the potential suitability of the 9 existing employment sites to accommodate a local waste facility in line with emerging LDP Policy SP9: Waste.
- 6.23 Local waste facilities are defined in the Regional Waste Plan (RWP) Technology Strategy (see paragraph F5.2 and BBNPA Waste Issues Paper) as:-
- 1 Clean materials recovery facilities;
 - 2 Transfer stations;
 - 3 Civic amenity; and,
 - 4 Construction and demolition exemption.
- 6.24 In line with Policy 42 of the emerging LDP, in considering the Site's potential suitability for local waste facilities, consideration has been given to the:-
- 1 Sensitivity of existing uses on Site;
 - 2 Proximity of neighbouring properties and considerations relating to potential health or safety hazards; and,
 - 3 Accessibility.
- 6.25 Policy 42 of the LDP also states that local waste management and recycling facilities will be permitted (subject to other considerations) at existing waste management sites or B2 industrial units, therefore those existing employment Sites which do not include a B2 element have been discounted and considered as not being suitable for a local waste facility.
- 6.26 Table 6.7 below contains a summary of the key considerations in respect of each of the existing employment sites:-

Table 6.7 Suitability for local waste facilities

Settlement Hierarchy	Site	Use Classes	Suitability for Waste?
1	BREC 1 Enterprise Park	A1, sui generis, B1, B8	<p>No current B2 uses within the Park.</p> <p>Some existing uses on the site are likely to be adversely affected by a local waste facility however the site's location directly off the A470 is advantageous.</p> <p>The Park contains a 0.8 hectare vacant plot, which is allocated in the LDP for B1, B2 or B8 uses. This plot may be suitable for some forms of local waste facility which are likely to yield minimal bad-neighbour issues associated with noise, odour, appearance etc. However further investigation is required should a particular waste need be identified in the National Park.</p>

Settlement Hierarchy	Site	Use Classes	Suitability for Waste?
	BREC 2 Ffrwdgrech Ind. Estate	B1, B2, B8, A1	A large Industrial Estate which benefits from good strategic access off the A470. A range of existing uses are present within the site, including some existing B2 units. Therefore the site may be suitable for some forms of local waste facility which are likely to yield minimal bad-neighbour issues associated with noise, odour, appearance etc. However further investigation is required should a particular waste need be identified in the National Park.
2	TAL1 Talgarth Bus. Park	B1, B2, B8	<p>Located close to existing residential properties and public open space.</p> <p>The majority of the site is occupied by B1 and B8 uses. One unit is used for a B2 use (small-scale manufacturing of test chambers). Some vacant floorspace is present. The site's current use and sensitive surrounding uses is likely to mean a local waste facility is not suitable.</p>
	CRICK1 Elvicta Bus Park	B1, B2, B8	<p>This site is located away from existing residential properties and is directly accessible off an A-road. Existing uses in the Business Park are mixed and include a B2 (garage) use, although the proximity of some office uses may raise some conflict of use issues.</p> <p>Therefore the site may be suitable for some forms of local waste facility which are likely to yield minimal bad-neighbour issues associated with noise, odour, appearance etc. However further investigation is required should a particular waste need be identified in the National Park.</p>
	CRICK2 Granada Park	B1, B2, B8	<p>The site is located away from residential properties and is close to a strategic road access. Some existing B2 uses operate on the site but there is potential for some conflicts with existing B1 uses in particular – although this would depend on the nature of the waste facility.</p> <p>Therefore the site may be suitable for some forms of local waste facility which are likely to yield minimal bad-neighbour issues associated with noise, odour, appearance etc. However further investigation is required should a particular waste need be identified in the National Park.</p>
	HAY1 Wye Valley Bus.	B1, B8	Not a B2 use site, therefore a local waste facility is likely to result in a significant

Settlement Hierarchy	Site	Use Classes	Suitability for Waste?
	Park		<p>conflict of uses between the existing B1 and B8 uses.</p> <p>Not suitable for a local waste facility.</p>
	HAY5 Greenfield Ind. Est.	B1, B2, B8	The site is located on the edge of the Hay-on-Wye and is accessible via a B-road running through the settlement and past residential areas. Immediate uses are sensitive e.g. residential and doctor's surgery and therefore it is not considered suitable for a waste facility.
	SENNY1 Timber Yard	B2, B8	Existing B2 uses (sawmill and timber treatment unit) on site although the Site's poor access arrangements and proximity to residential uses means it is not considered to be suitable for a local waste facility.
3	GIL1 Gilwern Park Industrial Estate	B1, B2, B8, D1	<p>The site is located away from existing residential uses and reasonably close to the Heads of the Valleys Road, although vehicular access into the Site is only possible via the settlement of Gilwern.</p> <p>Existing B1 uses on the site may create a conflict with a local waste facility but a large majority of the site is already used for a B2 use. Therefore it may be suitable for some forms of local waste facility which are likely to yield minimal bad-neighbour issues associated with noise, odour, appearance etc. However further investigation is required should a particular waste need be identified in the National Park.</p>

Source: NLP Analysis from site visit and BBNP survey undertaken to inform the Employment Issues Paper (September 2010)

6.27

Based on the above initial assessment, should a particular need be identified in the National Park for a local waste facility, 5 of the 9 existing employment sites may comprise suitable locations, subject to further investigation once the exact form of waste facility is known and consideration regarding land availability.

Conclusion

Employment

- 6.28 This assessment has provided an overview of the Brecon Beacons existing employment sites, identifying 4 that are of 'very good' (++) quality, 2 of 'good' (+) quality and 3 of 'average' (0) quality. This indicates that 67% of the sites within the National Park are very good (++) or good quality (+), with the remaining 33% being classified as 'average' (0) using this criteria. No 'poor' or 'very poor' sites were identified.
- 6.29 Both existing employment sites located in the National Park's Level 1 settlement (Brecon) were classified as very good, although the close proximity of the approved gypsy and traveller site was identified as a particular threat upon future market demand. Furthermore Talgarth's only employment site (Talgarth Business Park) was defined as very good, as was the Wye Valley Business Park in Hay-on-Wye.
- 6.30 Generally, those sites which were defined as average were sites which were detached from the existing urban form and suffered from a severe constraint. Nevertheless, despite these sites being identified as being average, they do have the capacity to perform an important role and function for the local economy.
- 6.31 In light of these findings, it is not considered that any of the identified employment sites should be released for non-B Class purposes and it is recommended that the LDP should retain the existing policy position relating to the protection of existing employment land for business purposes. LDP policies should only seek to resist the inappropriate redevelopment of existing business premises for alternative purposes unless there are clear reasons to justify any such loss.

Waste

- 6.32 An initial assessment of the 9 existing employment sites shows that the following 5 sites may particularly be suitable for some form of local waste facility which yield minimal bad-neighbour issues:
- 1 BREC 1 Enterprise Park
 - 2 BREC 2 Ffrwdgrech Industrial Estate
 - 3 CRICK1 Elvicta Bus Park
 - 4 CRICK2 Granada Park
 - 5 GIL1 Gilwern Park Industrial Estate
- 6.33 It is recommended that should a particular need be identified in the National Park for such a local facility, any allocation decision should only be taken following further interrogation, once the exact form of waste facility is known.

7.0 The Future Need for Employment Space

7.1 This chapter assesses the amount and type of employment space that is likely to be required in Brecon Beacons over the period to 2022. Whilst it considers changes in employment levels across all sectors of the economy, it only seeks to identify the space requirements of B Class sectors. This is due to differences in the approaches that are employed to appraise requirements for B Class employment space (based on job growth) and the space requirements associated with non-B Class sectors (based on an assessment of need – e.g. visitor numbers and retail/leisure expenditure levels etc). Other work (that falls beyond the scope of this commission) could be undertaken to appraise the need for land for non-B Class purposes.

7.2 However although anecdotal evidence from agent discussions suggest that the BBNPA is a relatively localised economy, it must be recognised that its economy does not operate in complete isolation from its surroundings. Key employment centres such as Abergavenny and Hirwaun, which are located on the fringes of the BBNPA, provide (competing) employment premises and job opportunities which affect the BBNPA economy. Whilst it is difficult to assess the exact extent of this impact upon the BBNPA economy it is important to recognise this (competitive) interaction.

7.3 It should also be recognised that the use of land for agriculture and forestry purposes does not constitute development and does not require planning permission and certain agricultural developments benefit from Permitted Development Rights. For those actions that do fall within the scope of the planning process, the existing Unitary Development Plan contains policies relating to the promotion of agriculture and forestry in appropriate locations and farm diversification and it is recommended that the emerging LDP should contain similar policies.

7.4 To estimate the future employment land requirements in Brecon Beacons, a number of different factors and indicators have been considered, including:

- 1 Forecasts of future employment growth in the area;
- 2 Past trends of employment development and the take-up of employment space; and,
- 3 Market demand, growth in the needs of local firms and future labour supply.

7.5 Some of these factors can pull in different directions and so a balance must be drawn between them.

Employment Growth

7.6 The starting point for our assessment of the future need for employment space in Brecon Beacons National Park is an understanding of the likely changes in the job requirements of different sectors.

- 7.7 Forecasts of employment growth in Brecon Beacons have been prepared by Experian Business Strategies Limited (Experian) specifically for this study. This analysis shows the changing levels of employment in 38 different economic sectors over a 35 year period from 1997 to 2031. These relate to the UK Standard Industrial Classification (SIC) code groups (UK SIC, 1997), as detailed in Appendix 6.

Forecast Methodology

- 7.8 The forecast that has informed this study is based upon the macro-economic assessments that were prepared in Spring 2012, using Experian's UK Regional Planning Service. This is a highly regarded economic forecasting service that provides comprehensive coverage of the UK economy. Its overall approach is based on a methodology that combines long-term supply and demand influences with short-term demand side factors. In the short to medium term, economic performance is driven by demand side influences, whilst the long term determinant of growth is supply potential – defined by factors such as productivity, participation, infrastructure and demographic profile.
- 7.9 It is important to recognise that employment and economic forecasts tend to be more reliable at regional and national levels rather than at the local economy level – particularly in this case where the numbers associated with individual employment sectors are generally limited and a typically acceptable margin of error might result in a greater than average impact upon the forecast data. However, they can indicate the broad scale and direction of growth in different economic sectors over the longer term and do offer a valuable and reliable source of information upon which employment land reviews can rely.
- 7.10 At this current time of economic instability it can be particularly difficult to achieve reliable economic forecasts. Uncertainty regarding the need for and the implications of different intervention strategies can result in an inability to predict the scale or direction of change with any reliability. The cyclical nature of the economy does, however, mean that a future upturn is guaranteed. In this context, long term economic forecasting would have a greater reliability than short term forecasts as it would assume – and take account of – longer term cyclical trends which can even out individual periods of growth and decline.
- 7.11 Separate data on employment growth is not normally available at National Park level but rather on a local authority level as the lowest output area. However, Experian was able to prepare specific forecasts to inform our analysis for this study.

7.12

The approach that was adopted by Experian in the preparation of employment forecasts for the National Park is set out below (in steps 1 to 5):

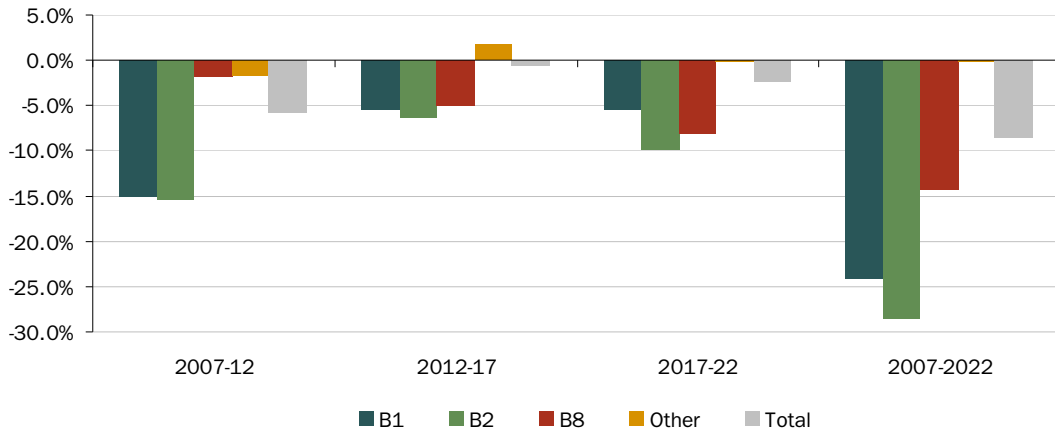
- 1 Using GIS software the Brecon Beacons National Park Authority was defined in terms of Census Output Areas and Lower Super Output Areas (LSOA).
- 2 Experian's employment data for 38 Standard Industrial Classification 2007 (SIC) (see Appendix 7) was aggregated down into ten broad SIC sectors.
- 3 The same total employment data was also derived from the 2001 Census for each respective output area to calculate the proportion of total employment by industry for each output area.
- 4 The proportion of total employment by industry was then calculated.
- 5 The derived proportions were then updated using information from the Annual Business Inquiry (ABI)/Business Register and Employment Survey (BRES) (official ONS labour market records).
- 6 Data was compared across a number of years and were applied to the Census ratios in order to show the level of change in the relative importance of different sectors over time. Agriculture ratios were left unadjusted from the 2001 Census (since ABI/ BRES does not represent the sector very well and it is a relatively large sector in the National Park). However, the results were checked against the Small Area Agriculture Statistics for Wales.
- 7 The derived proportions by broad industry and LSOA were then applied to Experian's total employment forecasts by broad sector. The broad sector LSOA forecasts were disaggregated to 38 sectors using the ratios derived.
- 8 As a final step, the lower super output area data was aggregated to the National Park level.

Employment Growth in Brecon Beacons

7.13

In terms of overall growth, the number of jobs is expected to fall by 8.5% from 17,600 to 16,000 over the LDP period from 2007 and 2022. The majority of this decline occurred in the period between 2007 and 2012, such that the expected decline between 2012 and 2022 is 2.5%:

Figure 7.1 % Employment change in Brecon Beacons, 2007-2022

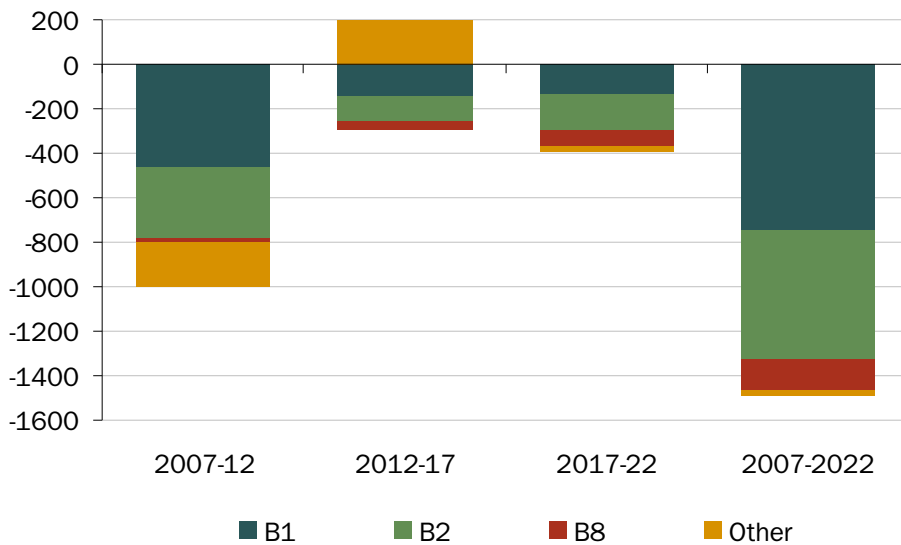


Source: Experian Business Services Ltd / NLP Analysis

7.14 This analysis shows that Class B2 and B1 activities are expected to experience the greatest proportionate contraction. Both sectors reduced by about 15% in scale between 2007 and 2012 and are expected to contract by between 24% (B1) and 28% (B2) over the LDP period.

7.15 In terms of the actual level of employment change over the LDP period, Class B1 activities are forecast to be the worst affected, with a loss of 750 jobs. By comparison, there is expected to be a loss of some 600 Class B2 jobs and 150 Class B8 jobs. The number of “other” (i.e. non B-Class) jobs is only expected to fall by 20 jobs.

Figure 7.2 Employment change in Brecon Beacons, 2007-2022

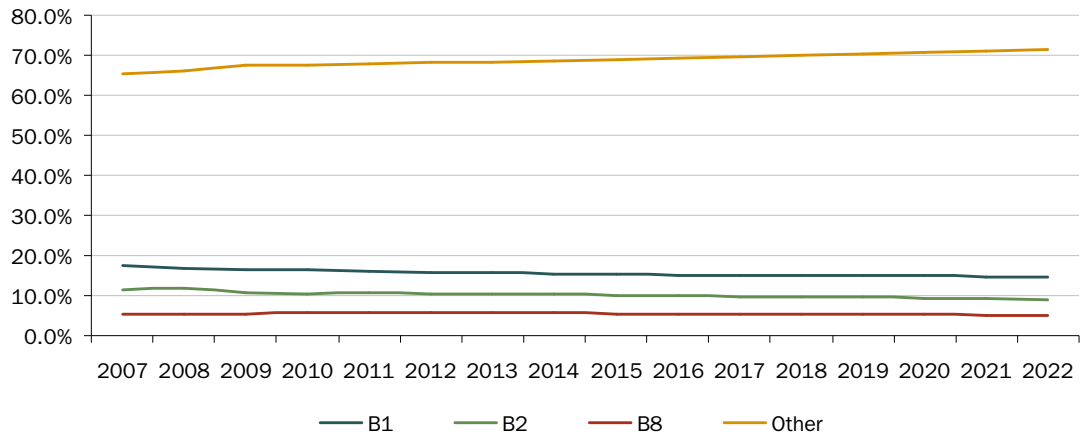


Source: Experian Business Services Ltd / NLP Analysis

7.16

These forecast employment changes are illustrated below in terms of the resultant contribution of different Use Class sectors to the local economy:

Figure 7.3 Contribution to total employment in Brecon Beacons made by the main broad economic sectors



Source: Experian Business Strategies Ltd / NLP Analysis

7.17

This analysis is important in demonstrating:

- 1 The vulnerability of B Class sectors within Brecon Beacons, compared to the non-B Class sectors which are of considerably greater importance to the local economy within the National Park. Non-B activities are only expected to decline by 0.2% over the LDP period and their contribution to local employment is expected to increase from 65% in 2007 to 71% in 2022. As shown below, these overall figures serve to obscure the level of change within individual sectors:

Table 7.1 Employment change within individual non-B class sectors, 2007-2022

Sector	Employment Change	
	2007-2022	2012-2022
Retail	-160	-210
Land Transport, Storage and Post	-200	-140
Public Administration & Defence	-550	-160
Education	260	110
Health	320	150
Residential Care & Social Work	290	180

Source: Experian Business Services Ltd / NLP Analysis

- 2 The continued importance of Class B1 activities within the local economy and, particularly as a component of those uses that occupy employment

floorspace. Despite a larger absolute contraction than for any of the other individual sectors, Class B1 activities are expected to account for a constant 50% of B Class employment throughout the LDP period.

- 3 The fact that whilst Class B2 activities amount for fewer jobs than the B1 sectors, this sector is forecast to contract more rapidly over the LDP period. This is not surprising given that the small scale nature of industrial activities within the National Park and their limited capacity to compete with larger-scale operations located outside of the National Park. It is projected that by 2022, Class B2 activities will account for less than 10% of employment within the National Park (compared to 11.6% in 2007).
- 4 The very limited scale of Class B8 activities within Brecon Beacons. In 2007, B8 employment accounted for 5.4% of jobs within the National Park and by 2022, it is expected that this sector will have reduced to account for 4.5% of jobs within the National Park. Again, the reason for this is due to the location and accessibility characteristics of the National Park which mean that it is not well suited to warehousing and distribution activities.

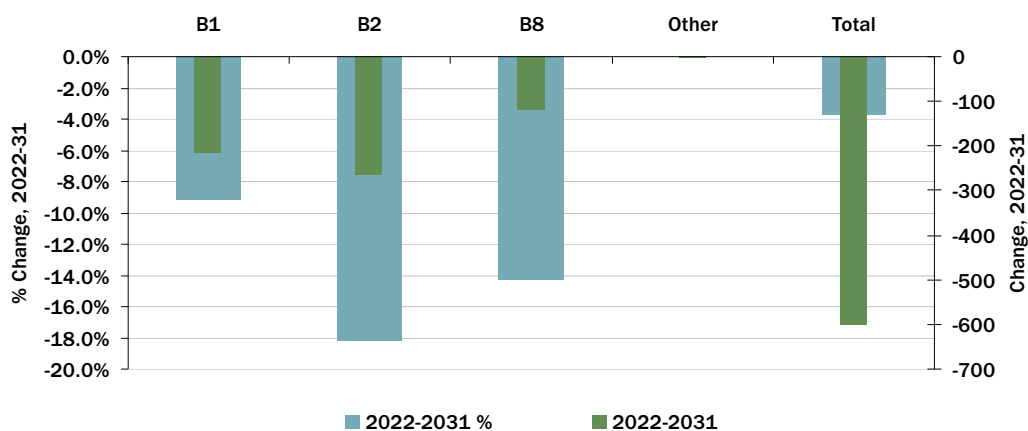
Longer term employment growth

7.18 Although the emerging LDP covers the period to 2022, it is important to pay some regard to the longer term future in order to understand how the policies and proposals that are being formulated at this time might have a bearing upon subsequent plan periods. This analysis shows that the overall rate of employment decline will reduce with a further 3.7% reduction in the total number of jobs in Brecon Beacons National Park between 2022 and 2031. In particular, it is forecast that:

- 1 There will be no further reduction in the non B-Class sector employment;
- 2 The scale of contraction in Class B1 employment is expected to fall by a third, compared to the current LDP period;
- 3 The scale of job loss in Class B2 sectors is expected to continue at the same rate as that which is anticipated between 2007 and 2022; and,
- 4 The scale of employment loss in Class B8 sectors is expected to double, compared to the current LDP period.

7.19 Whilst long term employment change within Brecon Beacons will be the subject to further analysis (and updated forecasts) when the LDP is reviewed, it is helpful to understand that the current projections anticipate a long term trend in respect of economic change. This means that the policies that are to be implemented at this stage will appropriate to the area over the longer term.

Figure 7.4 Anticipated employment change in Brecon Beacons, 2022-31



Source: Experian Business Services Ltd / NLP Analysis

Comparison with Regional Forecasts

7.20 The employment forecasts for Brecon Beacons reveal an 8% reduction in employment levels between 2007 and 2022 (a loss of 1,500 jobs). By contrast, the forecasts for Wales as a whole anticipate an increase of 4.2% (900 jobs) over the same period².

7.21 Whilst the forecasts for Wales and the Brecon Beacons both point towards a substantial loss of employment in Class B2 activities, the Welsh forecasts are considerably more positive in respect of other employment sectors, as shown below:

² The forecasts for Brecon Beacons and for Wales as a whole have been provided by Experian Business Strategies Ltd and can therefore be reliably compared.

Figure 7.5 Employment Projections for Brecon Beacons and Wales, 2007-2022

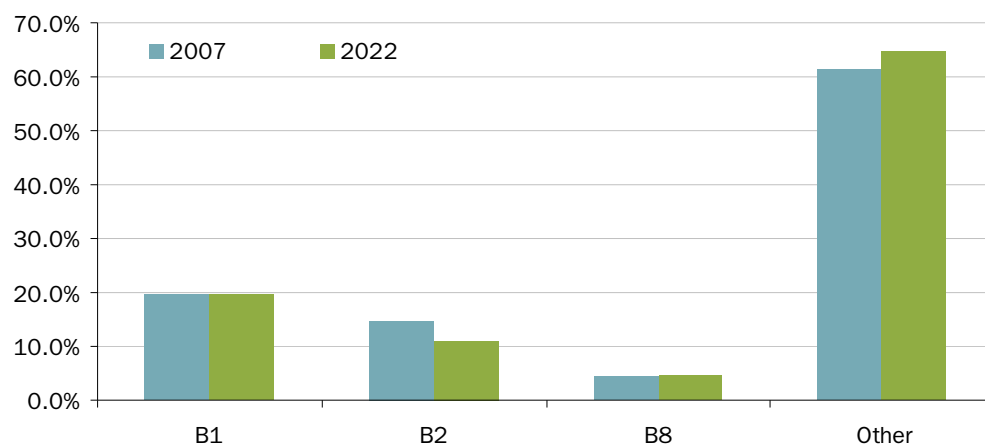


Source: Experian Business Strategies Ltd / NLP Analysis

7.22 The Welsh analysis shows that that the growth will be particularly dominated by an increase in non-B Class employment (1,150 jobs: +9.85% increase). This compares to a very small reduction (-20 jobs: -0.2% in Brecon Beacons). The implication of this is that by 2022, non-B class sectors are expected to account for 64.8% of total employment in Wales (up from 61.5% in 2007). However, despite the expected reduction in employment in non B Class activities, this broad sector is expected to account for 71.3% of employment in the Brecon Beacons by 2022 (compared to 65.4% in 2007). This shows that by 2022, non-B Class activities are expected to account for the large majority of employment and economic activity in the Brecon Beacons and that the local dominance of this sector is expected to increase, both in real terms and in relation to its importance throughout Wales.

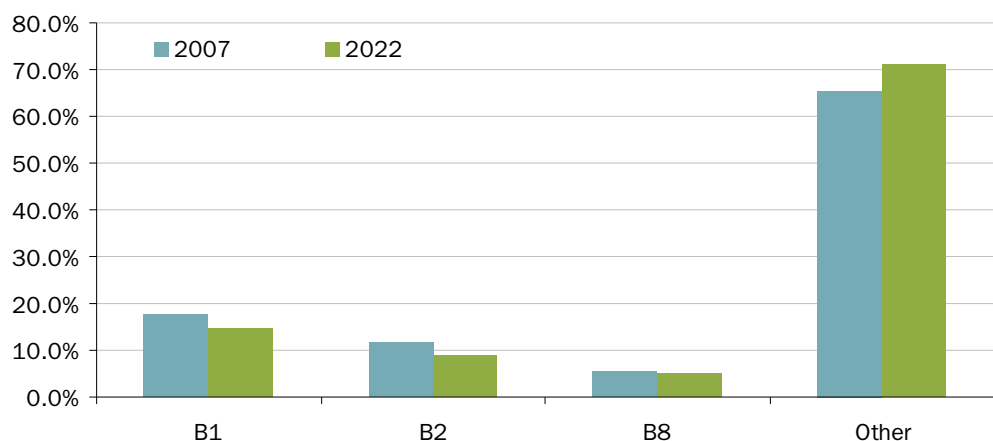
7.23 Although Class B8 employment is expected to increase by 8.9% in Wales between 2007 and 2022, this only accounts for an additional 5,300 jobs. By contrast, employment in Class B1 sectors is expected to increase by 13,700 (5.1%) jobs over the same period. The implication of these growth levels is that the relative importance of both sectors will increase very slightly over the Plan period: Class B1 activities will account for 19.7% of total employment in Wales in 2022 (compared to 19.6% in 2007), whilst Class B8 activities will account for 4.5% of total employment in Wales in 2022 (compared to 4.3% in 2007). These changes can be put into context through a comparison with the changing economic structure in the Brecon Beacons where Class B1 employment is expected to decline from 17.6% to 14.6% of total employment and Class B8 employment is expected to fall slightly from 5.4% to 5.1%.

Figure 7.6 Changing Employment Structure in Wales, 2007-22



Source: Experian Business Strategies Ltd / NLP Analysis

Figure 7.7 Changing Employment Structure in Brecon Beacons, 2007-22



Source: Experian Business Strategies Ltd / NLP Analysis

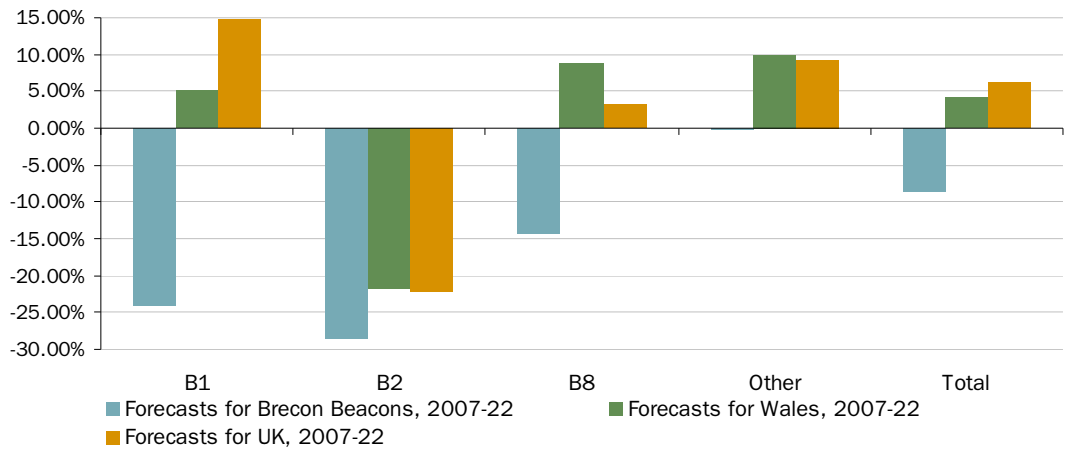
Comparison with National Forecasts

- 7.24 As set out in the introduction to this section, economic forecasts tend to be more reliable at a national level, although the current economic recession does make (particularly) short term forecasts problematic. Current expectations are macro-economic growth will be limited in 2012 (GDP growth at c. 0.5%) and 2013 (GDP growth at c. 1.5-2%).
- 7.25 Over the lifetime of the Brecon Beacons LDP, UK employment is expected to increase by over 2 million (6.5%). The structural composition of this change can be compared to that of Brecon Beacons and Wales.

7.26

As for the other areas that we have considered, employment in Class B2 activities is expected to decline rapidly throughout this period. However, reflecting the dominance of the service sector to the UK economy, Class B1 employment is expected to increase by 15% (1.2m jobs) at the national level. Employment in non-B Class activities is expected to increase by a total of 1.7m, although this only equates to a 9.4% increase – a figure that is broadly equitable to the anticipated level of change in Wales.

Figure 7.8 Employment Projections for Brecon Beacons, Wales and the UK, 2007-2022

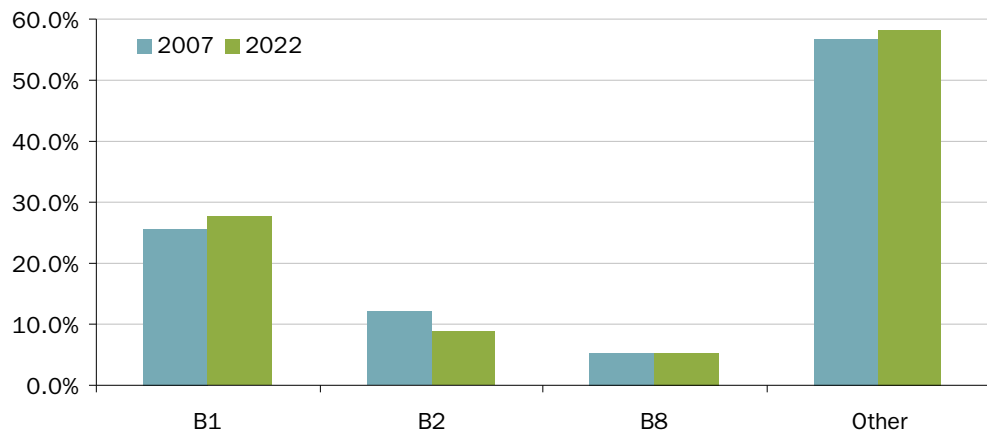


Source: Experian Business Strategies Ltd / NLP Analysis

7.27

As set out above, employment change in Wales and the Brecon Beacons between 2007 and 2022 is expected to impact upon the structural composition of the economy. By contrast, the UK is expected to display a greater level of stability in terms of the employment spread between different sectors.

Figure 7.9 Changing Employment Structure in the UK, 2007-22



Source: Experian Business Strategies Ltd / NLP Analysis

7.28

In seeking to understand the regional and national figures and their relationship to the growth forecasts for Brecon Beacons, it is reasonable to expect that the

relative growth figures for the Wales and for the UK South West region would be substantially higher than those for the Brecon Beacons National Park. The figures reflect the greater strength and diversity of the Welsh and the British economies and the reality that the major British centres (of which there are none in the Brecon Beacons National Park) will play a dominant role in helping to deliver growth.

- 7.29 The higher relative growth figures for the Wales and the UK are more deliverable in the context of past economic and development trends. The local economy in the Brecon Beacons has grown at a consistently slower rate than that of Wales and the UK. This is due to a number of factors including the limited opportunities for development and investment in a narrow range of sectors and the low profile of the National Park as an economic centre. Whilst the employment forecasts for Wales and the UK must now be viewed in the context of changing global circumstances, it is entirely reasonable to anticipate that they will continue to grow at a faster rate than that of Brecon Beacons National Park.
- 7.30 However, for the purposes of comparison, we do consider below the employment land requirements that would be arise in the event that employment in the Brecon Beacons grew at the same rate as that of Wales as a whole.

Employment Based Space Requirements

- 7.31 An appreciation of the future employment requirements for each broad category is important in understanding the nature and scale of changes within the local economy. However, the translation of job forecasts to land requirements represents an important basis by which the implications of growth might be fully recognised.
- 7.32 As has been shown, the baseline forecasts for Brecon Beacons shows a decline in employment levels by 1,490 over the LDP period. Reflecting the current profile of the National Park, a key future trend is expected to be the continued (and increasing) dominance of non-B Class employment sectors, the limited role of traditional B Class employment activities and the on-going significance of small scale business activities.
- 7.33 The consequence of these factors is expected to be a limited requirement for future B Class employment development within Brecon Beacons. This section appraises the level of growth that is likely to be required. In seeking to quantify the employment land requirement, a number of considerations should be taken into account, as follows:
- 1 The relative proportion of B Class and non-B Class jobs within a local area is a key characteristic of the National Park economy and demonstrates that the future economic well-being of the National Park will rest to a very large extent upon those activities that do not generate a specific employment land requirement.

- 2 Within any employment sector, additional staff can often be accommodated within existing premises and so a growth in B Class activities would not necessarily generate a requirement for additional employment land.
- 3 In addition, within an existing employment area, there may be potential for new infill buildings that would satisfy an employment land demand but without having any impact upon the strategic land requirement.
- 4 Different business sectors will have very different employment land requirements even though they might employ the same number of people. This will have a substantial impact upon the overall employment land requirements and shows that this is dependent upon the type of jobs as well as the number of jobs that are to be created.
- 5 Similarly, the amount of land for a particular economic activity will vary according to location. For example, the density and land requirement of town centre offices will differ to that of a more isolated, free-standing development. Nevertheless we consider that an appropriate allocation threshold for new employment sites should relate to sites of 0.5 hectares and above. This represents a reduction from the LDP's current allocation threshold of 2 hectares. We consider this reduced threshold better reflects evidence which illustrates that the BBNPA economy is characterised by smaller-scale units and these types of smaller, start-up units are required for the future.
- 6 The reuse of vacant land and premises may contribute towards a reduction in the amount of new employment land that may be required, albeit that a certain level of vacancy (typically about 10%) is necessary to ensure the efficient and effective operation of the market. As set out in paragraph 4.19, vacancy rates within the National Park are 11% - only very slightly above the level that is typically "required" for the effective operation of the market. As such, it is not considered that there is any significant scope to reuse existing vacant premises in order to meet future employment requirements. In addition, when considering the possible reuse of vacant premises, regard should be given to its suitability for future needs. The views raised by consultees to this study suggested that many of the vacant premises are not best suited to meet the needs of current and potential future operators.
- 7 New employment premises might be provided by the reuse or conversion of existing buildings rather than through the development of new sites. This type of development has been a key characteristic of past trends in Brecon Beacons and is expected to continue. It will have a bearing upon the approach that is taken to the identification of sites for employment development within the LDP as it is not normally appropriate to allocate land for conversion and such uses tend to therefore come forward as windfall releases.
- 8 Conversely, the loss of employment in a particular sector may not necessarily result in the release of land. Job losses might arise as a result of the automation of a particular process or changes in the

economic circumstances of a company (which may in turn be affected by macro-economic trends). This would not necessarily result in less land being required or, therefore, in the release of surplus premises or land. The release of land might only be possible through the reconfiguration of operations and the redevelopment of the site, something that would not necessarily be appropriate and may not be viable at a time of economic difficulty. A more typical implication of job losses (where the business remains in operation) would be a slightly less efficient use of land in terms of employment density. Even where a business closes entirely, the site would not necessarily be expected to be released for alternative land uses.

In addition, even where employment levels fall, a requirement for alternative (but not necessarily additional) premises might generate a demand for the release of extra land. For these reasons, our analysis does not allow for the release of land in response to the projected slight reduction in Class B1 office employment. Indeed, the protection of employment land is likely to be particularly important in the future and regard should be given to ensuring that the existing policy framework that provides for the retention of B Class employment spaces is maintained so that the long term economic well-being of the National Park might continue to be based upon its existing portfolio.

7.34 The land requirements associated with the forecasts set out in the first part of this chapter can be ascertained by using typical ratios of jobs to floorspace for the different B Class uses. NLP has prepared a set of ratios, drawing upon various sources including published studies, operators’ reports and information obtained directly by operators. These ratios have been applied in a range of different locations and have been found to be reliable and robust.

7.35 The ratios that we apply are set out below:

Table 7.2 Jobs to floorspace ratios

Use	Ratio	Notes
Offices	1 job per 12.5 sq.m	This ratio takes account of the expectation of smaller-scale office units rather than larger, business park or City Centre headquarters facilities.
Manufacturing	1 job per 49 sq.m	This figure relates to light industrial activities which are considered to be better suited to the National Park context.
Distribution	1 job per 65 sq.m	Larger-scale strategic distribution would have a ratio of 1 job per 74sqm, although this type of activity is not suited to the National Park.

Source: NLP Economics Group

7.36 Floorspace requirements can be translated into land requirements by applying average plot ratios. In this case, an average plot ratio of 0.4 is used so that a 1ha site would be required to accommodate 4,000sqm of employment floorspace. No specific allowance has been made for higher density office developments as this is not considered appropriate or feasible within the context of the National Park.

Baseline Scenario

7.37 The implication of these considerations is that the baseline scenario is not expected to generate any direct requirement for additional employment land over the LDP period:

Table 7.3 Employment Change Forecast, Past Trend-based Projection

	2007	2012	2022	2007-2012	2012-2022
B1	3,103	2,634	2,354	-467	-280
B2	2,038	1,724	1,455	-314	-269
B8	953	936	816	-17	-120
Other	11,517	11,315	11,494	-202	179
Total	17,610	16,610	16,120	-1,000	-490

Source: Experian Business Strategies Ltd / NLP Analysis

7.38 However, for the reasons set out above, it does not follow that it would necessarily result in the release of any land – and certainly, it is not possible to forecast how many sites or the location of any sites that might become surplus to requirements. As such, there should be no requirement to plan for a strategic reduction in the amount of employment land within the National Park.

7.39 We set out below the importance of making provision for a safety margin to allow for choice, flexibility and for the replacement of any sites that are lost to non-B Class uses. It is expected that changes will take place within employment locations in the Brecon Beacons over the LDP period and so the LDP should seek to make some provision to ensure that these can be supported. Accordingly, there is an argument to suggest that even though the baseline scenario anticipates that employment levels within the Brecon Beacons will fall over the LDP period, a small amount of additional land will be required to meet future needs.

Alternative Scenarios

7.40 Rather than focusing solely upon the baseline forecasts, it is appropriate to consider the implications of alternative employment growth scenarios. This is in order to test the implications of alternative levels of growth and thereby to

provide the most reliable basis by which future employment land requirements might be planned.

7.41 To this end, we have considered three alternative scenarios, as follows:

- 1 Rolling forward past trend levels of employment growth over the LDP period;
- 2 Rolling forwards past completions over the LDP period;
- 3 The application of the levels of employment growth that are anticipated for Wales over the LDP period to the Brecon Beacons; and,
- 4 The assumption of increased levels of employment growth within key sectors within the Brecon Beacons.

7.42 Under each scenario, we consider the employment change over the full LDP period (2007-2022) and also over the remaining period from 2012 to 2022. The reason for this is to reflect the fact that the first 5 years of the LDP period have passed and that, economically, these have been very challenging. Although the economy is still in a difficult position, future projections are more positive than those relating to the first five years of the LDP period.

7.43 Considering this future period therefore allows for a realistic indication of future requirements – planning for growth rather than for a continuation of recession.

Past Trends Scenario

7.44 For comparison purposes, this scenario effectively “rolls forward” the employment growth rates for B-class sectors that were achieved in the Brecon Beacons over the period from 1997 to 2007 (as provided by Experian). This is effectively a “no recession” scenario, which assumes that growth will continue in accordance with the average growth rates experienced between 2007 and 2012.

7.45 Table 7.4 shows how the outputs from this scenario differ substantially from those associated with the Experian baseline forecasts. This scenario predicts a large level of office-based growth and a small amount of growth in B8 activities. Overall, B class employment under this scenario is forecast to increase by 1,675 jobs (9.5%) between 2007 and 2012 and 3,350 jobs (17.4%) between 2012 and 2022. This level of growth is unsurprising given that this scenario reflects the buoyant pre-2007 economy.

Table 7.4 Employment Change Forecast, Past Trend-based Projection

	2007	2012	2022	2007-2012	2012-2022
B1	3,103	3,654	4,761	551	1,107
B2	2,038	1,996	1,912	-42	-84
B8	953	966	991	13	25
Other	11,517	12,669	14,972	1,152	2,303

Total	17,610	19,285	22,636	1,675	3,351
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Source: Experian Business Strategies Ltd / NLP Analysis

7.46

The floorspace and land implications of the anticipated B Class growth between 2012 and 2022 is summarised below:

Table 7.5 Floorspace and Employment Land Requirements, Past Trend-based Projection

	B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	1,107	12.5	13,838	4,000	3.5
B2	-84	49	-		-
B8	25	65	1,625		0.4
TOTAL	1,048		15,463		3.9

Source: Experian Business Strategies Ltd / NLP Analysis

7.47

Given that this scenario generates a positive level of employment growth between 2007 and 2012, consideration should be given to the associated land requirements and the extent to which completions between 2007 and 2012 were able to meet this demand:

Table 7.6 Floorspace and Employment Land Requirements 2007-2012, Past Trend-based Projection

	B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Completions 2007-2012 (sq.m)	Unmet floorspace requirement (sq.m)
B1	551	12.5	6,888	2,382	4,506
B2	-42	49	-	-	-
B8	13	65	845	252	593
TOTAL	522		7,733	2,634	5,099

Source: Experian Business Strategies Ltd / NLP Analysis

Table 7.7 Unmet land requirement from 2007-2012

	Unmet floorspace requirement (sq.m)	Plot Ratio (sq.m/ha)	Unmet Land Requirement (ha)
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B1	4,506	4,000	1.1
B2	-		-
B8	593		0.1
TOTAL	5,099		1.2

Source: Experian Business Strategies Ltd / NLP Analysis

7.48 The implication of this analysis is that a further 1.2ha should be added to the 2012-2022 requirement, thereby generating a total requirement of **5.1ha over the remaining 10 years of the LDP period.**

7.49 This is substantially more than the amount that has been forecast as likely to occur in the future. This is because this scenario effectively ignores the economic reality of the recession. Whilst this scenario is helpful in providing a maximum scale of growth that may have been necessary if pre-recession conditions had continued, it should only be considered for comparative purposes rather than as an actual basis by which future economic change might actually be understood.

Past Completions-based Scenario

7.50 In addition to rolling forward past employment trends to show potential employment land requirements, it can also be useful to test the implications of assuming that the level of past completions will be replicated in the future. However, when undertaking such analysis, it is important to do so in the context of an appreciation of the following matters:

- 1 Past trend assessments are based upon the assumption that what has happened in the past will be replicated in the future, regardless of changes to land supply, economic conditions and policy priorities.
- 2 The limited level of employment land development that has occurred within the Brecon Beacons National Park makes it difficult to make reliable assumptions about future requirements, as the overall figures might have been skewed by individual developments.
- 3 Whether the employment floorspace was created to meet additional needs or to replace any floorspace that has been lost to other land uses.

7.51 Any change of use developments should be excluded from this analysis which should focus solely upon new employment premises. Rolling forward the level of new employment developments that have been completed between 2001 and 2011 would result in a requirement for 2.5ha employment land over the remainder of the LDP period, whilst rolling forward the level of new employment developments that have been completed between 2007 and 2011 would result in a requirement for 1.3ha employment land over the remainder of the LDP period.

7.52 It should be noted that the higher of these figures is above the figure associated with the Wales-based Projections Scenarios, and raises concerns about its likely deliverability. Also, as this takes account of employment completions in the pre-recession period, it is based upon the assumption that the economy will return to full strength very quickly, even though all projections anticipate sluggish performance for several years – well into the remaining 10 years of the LDP period.

7.53 In the light of this, we consider that the requirement for **1.3ha employment land represents a more reasonable requirement figure for the remainder of the LDP period**, even though this is based upon a very small sample of completed developments that have occurred during the recession period. However, it is very optimistic compared to the baseline projection and so clear policy support will be required to ensure that it can be realised over the next 10 years.

Wales-based Projections Scenario

7.54 As set above, the Experian projections for Wales as a whole anticipate a 4.2% growth in employment between 2007 and 2022. Accounting for a slight decline in employment between 2007 and 2012, this results in an expected increase in employment of 5.6% between 2012 and 2022.

7.55 Applying the average levels of employment change in Wales to the 2007 employment levels in the Brecon Beacons results in the following levels of employment change over the LDP period:

Table 7.8 Employment Change Forecast, Wales-based Projection

	2007	2012	2022	2007-2012	2012-2022
B1	3,103	3,003	3,259	-100	256
B2	2,038	1,753	1,595	-285	-158
B8	953	951	1,037	-2	86
Other	11,517	11,779	12,653	262	874
Total	17,610	17,486	18,544	-124	1,058

Source: Experian Business Strategies Ltd / NLP Analysis

7.56 Over the entire LDP period, a total of 934 jobs are to be created. However, given that 1,058 jobs are to be created between 2012 and 2022, we have considered the floorspace and land implications of the anticipated B Class growth between 2012 and 2022 is summarised below:

Table 7.9 Floorspace and Employment Land Requirements, Wales-based Projection

	B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	256	12.5	3,200	4,000	0.8
B2	-158	49	-		-
B8	86	65	5,590		1.4
TOTAL	184		8,790		2.2

Source: Experian Business Strategies Ltd / NLP Analysis

7.57 Although the land requirement of **2.2ha over the period from 2012 to 2022** associated with this scenario is lower than the past trend scenario (1), it is still substantially higher than the baseline. It does take account of the recession but it does raise the question as to whether going forwards, the local economy within the Brecon Beacons will perform as strongly as that of Wales as a whole. We have compared past performance in the Brecon Beacons with that in Wales and the UK and this analysis has shown that, unsurprisingly, the economy of the National Park has not performed as strongly as that of the Principality of the Country as a whole. Going forwards, there is no reason to expect that this would change. Therefore this should again be viewed as upper level of growth which could only be achieved if a significant deviation from projected trends was achieved.

Key Sector Scenario

7.58 The purpose of this scenario is to consider the implications of a strategy that seeks to promote growth within the key economic sectors in the Brecon Beacons. As such, it adopts a more positive approach than the baseline, without simply rolling forward past trends or assuming that growth within the National Park will be proportionately the same as for Wales as a whole.

7.59 The key sectors were identified as those that employ an above-average proportion of the local workforce. The 14 dominant economic sectors were found to account for approximately 85% of all jobs within the National Park.

7.60 The baseline forecasts anticipated that many of these sectors would experience a loss of employment over the LDP period. Rather than adopting the baseline projections, we applied an alternative growth rate of 0% - 10% over the remainder of the LDP period from 2012 to 2022. The selected rate was based upon a review of past performance within each sector throughout the following five-year periods:

- 1 Between 1997 and 2002;

- 2 Between 2002 and 2007; and,
- 3 Between 2007 and 2012:

Table 7.10 Previous Employment Growth in Key Sectors

	1997-2002 (%, p.a.)	2002-2007 (%, p.a.)	2007-2012 (%, p.a.)
Agriculture, Forestry and Fishing	-3.73	0.33	-5.97
Construction	1.95	0.00	-2.22
Specialist Construction	2.13	3.08	0.33
Wholesale	-3.00	1.76	0.18
Retail	2.26	3.48	0.62
Land Transport, Storage and Post	6.81	-0.32	-1.94
Accommodation and Food Services	-1.17	0.00	-1.24
Recreation	9.41	5.2	-1.27
Professional Services	2.96	6.77	-1.45
Administrative and Supportive Services	1.57	6.18	-1.67
Public Administration and Defence	0.97	-1.85	-5.69
Education	6.17	2.55	1.69
Health	2.88	1.57	2.48
Residential Care and Social Care	0.00	1.55	1.76

Source: Experian Business Strategies Ltd / NLP Analysis

7.61

The employment growth rates that have been applied to this policy-on scenario are set out below. The baseline level of employment change for 2012 to 2022 has been applied to all other sectors.

Table 7.11 Projected Employment Growth in Key Sectors

	Projected Growth, 2012-22 (%, p.a.)	Projected Growth, 2012-22 (%)
Agriculture, Forestry and Fishing	3.68*	36.8*
Construction	0.00	0
Specialist Construction	1.00	10

Wholesale	0.25	2.5
Retail	1.00	10
Land Transport, Storage and Post	0.5	5
Accommodation and Food Services	0.00	0
Recreation	2.00	20
Professional Services	1.00	10
Administrative and Supportive Services	1.00	10
Public Administration and Defence	0.00	0
Education	0.00	10
Health	1.00	10
Residential Care and Social Care	1.00	10

* Experian Baseline Growth

Source: Experian Business Strategies Ltd / NLP Analysis

7.62 Applying these levels of employment change to the 2007 employment levels in the Brecon Beacons results in the following levels of employment change over the LDP period:

Table 7.12 Employment Change Forecast, Past Trend-based Projection

	2007	2012	2022	2007-2012	2012-2022
B1	3,103	2,634	2,737	-467	103
B2	2,038	1,724	1,529	-314	-195
B8	953	936	965	-17	29
Other	11,517	11,315	12,407	-202	1,092
Total	17,610	16,610	17,637	-1,000	1,027

Source: Experian Business Strategies Ltd / NLP Analysis

7.63 The floorspace and land implications of the anticipated B Class growth between 2012 and 2022 is summarised below:

Table 7.13 Floorspace and Employment Land Requirements, Key Sector Projection

	B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	103	12.5	1,285	4,000	0.3
B2	-195	49	-		-
B8	29	65	1,885		0.5
TOTAL	-63		3,170		0.8

Source: Experian Business Strategies Ltd / NLP Analysis

7.64 This is considered to represent a more reasonable figure in the context of the base line, past trend, past completions and Wales-based scenarios. It would require policy support to its delivery but it is envisaged that provision could be made for this modest amount of employment growth over the remainder of the LDP period.

7.65 Looking at the LDP period as a whole, this scenario anticipates a growth of just 27 jobs. Whilst this in itself would not require any additional land releases, 2,650 sq.m floorspace was completed between 2007 and 2012 (0.65ha). However, although this represents a large amount of the 2012-2022 requirement, we do recommend that the identified **requirement of 0.8ha over the next 10 years** should be applied in order to avoid a situation whereby planning restrictions serve to undermine the economic well-being of the area.

Labour Supply Scenario

7.66 In a rural area with constraints on new land supply, it is useful to consider how many jobs, and hence how much employment space, would be needed to broadly match forecast growth of the resident workforce within the Brecon Beacons. Any significant increase of employment space beyond that amount could potentially lead to labour shortages or increase demand for new housing in the area, creating further pressures on land supply. It would also raise issues regarding sustainability and deliverability.

7.67 Based on 2008 population projections for the Brecon Beacons which were prepared by the Welsh Government, the number of persons of working age within the National Park is expected to fall by approximately 10% over the LDP period, compared to an overall population increase of 1.3%.

7.68 Even taking account of factors such as economic activity rates and commuting patterns, it is apparent that the demand for employment space amongst those living within the National Park will actually fall over the LDP period, when considered against the Welsh Government's population projections.

7.69 The implication of this is that any future economic development that takes place will be reliant upon:

- 1 A reduction in unemployment levels;
- 2 An increase in economic activity levels; and/or
- 3 An increase in the number of people commuting into the Brecon Beacons

in order to fill the newly created jobs. This raises important issues relating to the sustainability of the National Park Authority's economic strategy. Alternatively, a higher level of housing provision and population growth might help to sustain, and in turn be sustained by, local employment creation.

7.70 In considering the implication of the Welsh Government's population projections, it is important to recognise that these are policy neutral and simply project the future effect of past demographic trends. They do not take account of policy aspirations or the implications of economic forecasts. This raises some concerns regarding the methodological soundness of basing economic requirements on the Welsh Government population projections. However, the demographic profile of the National Park is such that the number of working age and economically active persons is not expected to rise substantially over the LDP period. The LDP makes provision for only a modest level of house building and the current trend towards an ageing population (both through natural change and migration patterns) is expected to continue. Accordingly, the internally generated level of demand for additional employment space is expected to be limited.

Safety Margin

7.71 For planning purposes, it is normal and prudent to apply a fairly generous allowance for additional land to come forward to:

- 1 Provide for a margin of error in the forecasting process;
- 2 Allow developers and occupiers a reasonable choice of sites;
- 3 Enable normal market movement with relocations and turnover of firms;
- 4 Give some flexibility whilst old premises are redeveloped and new premises are coming forward;
- 5 Allow for some limited release of existing employment sites to other uses;
- 6 Allow for some sites not coming forward; and,
- 7 Allow for the implementation of policy objectives relating to growth of particular economic sectors.

7.72 Due to the nature of the local economy and the limited level of anticipated growth and demand for development, many of those factors which would ordinarily necessitate a high safety margin are not likely to be particularly prevalent within the National Park. For example, in the context of a small level of economic activity, there may not be much need to identify a large amount of additional land to provide for choice or to provide flexibility whilst premises are

being redeveloped, whilst the limited level of demand for the redevelopment of B Class sites for non-B Class purposes might reduce the need to make up for any such losses. However, in order to ensure that any errors in the forecasting process – particularly in the context of current economic uncertainties, the low land requirements that have been identified, and the difficulties associated with forecasting in the National Park – do not serve to undermine the planning process, we propose to apply a flexibility margin that is equivalent to a 5 year requirement. This equates to a 50% margin, as follows:

Table 7.14 Total Employment Land Requirements, including Flexibility Margin, 2012-2022

Scenario	Requirement (ha)	Flexibility Margin (ha)	Total Requirement (ha)
Baseline	0	0	0
Past Trends	5.1	2.55	7.65
Past Completions*	1.3	-	1.3
Wales-based growth	2.2	1.1	3.3
Policy-on	0.8	0.4	1.2

* Given that the past completion margin is based upon actual employment land completions and, as such, would represent the net change, it is not necessary to apply a flexibility margin.

Source: Experian Business Strategies Ltd / NLP Analysis

Sensitivity Analysis

7.73 Having established that the Policy-On scenario provides the most appropriate basis for the identification of future employment land requirements, it is helpful to test the implications of variations to some of our key assumptions. This sensitivity analysis is helpful in ensuring that the LDP makes adequate provision for future employment land requirements.

7.74 We have tested the following assumptions through our sensitivity analysis:

- 1 Spaceless growth;
- 2 Adjustment of floorspace densities;
- 3 Adjustment of plot ratios; and,
- 4 A composite of all three sets of sensitivity assumptions being met.

1. Spaceless Growth

7.75 The reality that a certain proportion of employment growth will be spaceless (i.e. will not have any associated employment land requirements) has already been highlighted in this chapter. The reason for this is that some people will choose to work from home whilst in many cases, the recruitment of new staff would not necessitate additional land or floorspace requirements. Rather, they

could be accommodated within existing premises, i.e. by using spare capacity or through hot desking. Similarly, automation and efficiency savings have meant that the loss of manufacturing jobs may not result in an equivalent loss of employment land.

7.76 None of the scenarios that have been considered in this chapter make any allowance for spaceless growth and so this sensitivity assessment considers the impact of:

- 1 10% of all new B1(a/b) and B8 sector jobs will be accommodated within existing occupied premises or as spaceless growth; and,
- 2 25% of the manufacturing jobs that are to be lost not having any employment land implications.

7.77 Whilst these figures are considered to represent a conservative estimate of the employment land implications of job losses, this factor is commonly overlooked by assessments of employment land requirements. It is considered that this modest allowance therefore provides for a greater level of realism in the assessment of employment land in the study area – particularly at this time of economic instability – and will therefore contribute towards a more robust land forecast.

7.78 Taking these assumptions, the table below sets out the land requirement when applying spaceless growth assumptions to the Policy-On scenario.

Table 7.15 Sensitivity Test 1: Spaceless Growth

	B Class Job Change, 2012-22	Spaceless Growth Allowance	Net Job Change, 2012-22
B1	103	10	93
B2	-195	-49	-146
B8	29	3	26
TOTAL	-63		-27

	Net B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	93	12.5	1,160	4,000	0.3
B2	-146	49	-		-
B8	26	65	1,700		0.4
TOTAL	-27		2,860		0.7

Source: Experian Business Strategies Ltd / NLP Analysis

7.79 The impact of this sensitivity test is a very small reduction in the overall land requirement. Including the flexibility allowance would increase this requirement to 1.0 ha.

Adjustment of Floorspace Densities

7.80 In translating employment projections to floorspace requirements, it is necessary to apply a series of floorspace densities. As set out above, we have applied standard set of floorspace densities. However, given the character of the local area and the likely scale of potential employment developments, we have tested the implications of the following alternative densities:

- 1 B1 – 20sqm/job. This figure reflects smaller scale office premises and serviced business centres which are considered to be more likely to be provided within the National Park than larger scale office units.
- 2 B8 – 40sqm/job. This also reflects the likelihood that smaller scale storage facilities would be provided. These operate in a less efficient manner in terms of the amount of space that can be managed by an individual worker and so a lower density has been assumed.

7.81 These alternative figures are designed to reflect the likely level of development that could be accommodated within the Brecon Beacons National Park, taking account of the expected business requirements and the sensitivity of the local environment which will necessitate a careful design approach.

Table 7.16 Sensitivity Test 2: Adjusted Floorspace Densities

	Net B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	103	20	2,060	4,000	0.5
B2	-195	49	-		-
B8	29	40	1,160		0.3
TOTAL	-63		3,220		0.8

Source: Experian Business Strategies Ltd / NLP Analysis

7.82 The impact of this sensitivity test is no change from the overall land requirement assumed by the Policy-On scenario as an increase in the requirement for B1 land would be off-set by a lower requirement for B8 space. Including the flexibility allowance would retain this requirement at 1.2 ha.

Adjustment of Plot Ratios

7.83 In translating floorspace projections to land requirements, it is necessary to apply a plot ratio figure. As set out above, we have applied a figure of 0.4 all

floorspace. Given the character of the local area, we have tested the implications of the following alternative plot ratios:

- 1 B1 – 3,000 sq.m/ha, on the basis that a larger proportion of the new floorspace would be provided as small-scale start-up / business incubation premises on small sites and at a lower density of development.
- 2 B8 – 2,500 sq.m/ha, on the basis of the provision of small scale storage units at a lower density of development.

7.84

These alternative figures are designed to reflect the likely level of development that could be accommodated within the Brecon Beacons National Park, taking account of the expected business requirements and the sensitivity of the local environment which will necessitate a careful design approach.

Table 7.17 Sensitivity Test 3: Adjusted Plot Ratios

	Net B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	103	12.5	1,285	3,000	0.4
B2	-195	49	-	-	-
B8	29	65	1,885	2,500	0.75
TOTAL	-63		3,170		1.15

Source: Experian Business Strategies Ltd / NLP Analysis

7.85

The impact of this sensitivity test is a reduction in the overall land requirement. Including the flexibility allowance would increase this requirement to 1.7 ha.

Composite Sensitivity

7.86

This final Sensitivity Assessment puts the results of the three previous sensitivity tests together in order to provide a composite employment land requirement if the following circumstances were fulfilled:

- 1 10% of employment growth being provided as spaceless growth;
- 2 A higher floorspace ratio for offices and a lower ratio for warehouses; and,
- 3 A lower density of employment development.

Table 7.18 Sensitivity Test 4: Composite Indicator

	B Class Job Change, 2012-22	Spaceless Growth Allowance	Net Job Change, 2012-22
B1	103	10	93

B2	-195	-49	-146
B8	29	3	26
TOTAL	-63		-27

	Net B Class Job Change, 2012-22	Floorspace Density (sq.m/job)	Floorspace (sq.m)	Plot Ratio (sq.m/ha)	Land Requirement (ha)
B1	93	20	1,860	3,000	0.6
B2	-146	49	-	-	-
B8	26	40	1,040	2,500	0.4
TOTAL	-27		2,900		1.0

Source: Experian Business Strategies Ltd / NLP Analysis

7.87 **Taking all of these sensitivity tests together would result in a small increase in the land requirement. Including the flexibility allowance would increase this requirement to 1.5 ha.**

The future economy in the Brecon Beacons

7.88 In seeking to understand the amount of employment land that is likely to be required within the Brecon Beacons over the remainder of the LDP period, it is important to consider future shape of the local economy and to understand how this would impact upon possible land allocations.

7.89 Based upon our analysis of the current economic context within the Brecon Beacons, discussions with consultees and an assessment of potential future economic trends, we anticipate that the Brecon Beacons will continue to be characterised by the following economic characteristics:

- 1 Small scale businesses, predominantly occupying reasonably small units.
- 2 Demand for business incubator, start-up and follow-on space in order to encourage business formation and development.
- 3 Locally owned and operated businesses with limited inward investment from elsewhere.
- 4 A focus upon environmental and quality of life considerations amongst those that move into the Brecon Beacons to start new businesses.
- 5 Demand to upgrade or replace existing facilities which no longer provide the level of quality that is sought by businesses.
- 6 Demand for business premises to be concentrated within the main settlements but on generally small scale sites – rather than the release of a single, large scale facility.

- 7 Demand for business premises to have a low environmental impact.
- 8 Continued dominance of non-B Class sectors with all key sectors continuing to be outside of the traditional “employment” activities.
- 9 A more limited level of employment growth than was experienced in the pre-recession period from 1997 to 2007.
- 10 A lower level of local economic growth than is anticipated within Wales as a whole.

7.90 These characteristics all point towards the reality that only a small level of B Class employment land would need to be allocated for employment purposes, although further development could come forward on windfall sites and through changes of use and conversions. This should be encouraged through relevant policies that promote employment growth in all sectors, particularly those that presently account for a large proportion of employment within the National Park. However, it will be important to ensure that the future development of non-B Class activities is not permitted to take place to the detriment of traditional B Class activities.

Planning Requirement for Employment Land

7.91 Drawing together the above considerations, it is evident that the level of future employment development within Brecon Beacons will be limited although cannot assumed to be met through the occupation of existing vacant units alone. The forecasted small level of employment growth translates to a small requirement for additional business space, a trend that is clearly supported by the evidence of what has happened in the past.

7.92 In the light of this, we consider that the low growth, policy-on scenario provides the most appropriate basis for the identification of the amount of land that is required for employment purposes over the remainder of the LDP period. Based upon our sensitivity testing, we recommend that the LDP should make provision for the development of 1.5ha of land for B Class employment purposes between 2012 to 2022 (made up of 0.9 hectares of B1 use class and 0.6 hectares of B8 use class). This amount is in addition to that which has been developed over the first 5 years of the LDP period. It is recommended that these new allocations should comprise of sites which measure at least 0.5 hectares, recognising the predominance of small scale businesses in BBNPA. Once more these Sites should be located within sustainable locations which are desirable to the market, such as Brecon and Hay-on-Wye.

7.93 Consideration of potential sites for this additional requirement is set out in Chapter 8.

7.94 It is important that the identified employment land provision should be viewed as a minima rather than a maxima. To this end, the delivery of employment land should be monitored and reviewed on a regular basis throughout the LDP period. This should also be set against an appreciation of changes to the macro and local economic context. In the event that additional land is found to

be needed then it might be appropriate to bring forward additional sites for development.

7.95

In addition, it will be important to recognise the potentially important role of windfall development and this should be encouraged through the establishment of appropriate policies. The key objective of these policies should be to support business and economic development, so long as it reflects the environmental sensitivity of the area and does not undermine the viability or deliverability of allocated employment sites.

8.0 Qualitative Assessment of Potential Employment Sites

8.1 The quantitative finding of chapter 7 forecasts a need for 1.5 ha of new employment land over the next 10 years in the Brecon Beacons National Park (2012 to 2022). With this in mind, on request from BBNPA we surveyed 10 identified potential employment sites. This chapter assesses the characteristics of these potential employment sites with a view to setting out their suitability for employment use.

Assessment of Potential Sites in Adjoining Authority Areas

8.2 A review of the potential cross-boundary employment opportunities has been undertaken to assess whether proposed employment sites in adjoining local authority areas but within close proximity of the National Park boundary (within close proximity) can help meet some of the identified need of the Brecon Beacons National Park.

8.3 Whilst cross-boundary cooperation is important to the future development of a local authority area, this must be set against basic criteria to review their potential effectiveness in supporting cross-boundary growth. This includes the following;

- 1 Whether the site is an existing employment site or whether it is proposed employment site;
- 2 Where the site is located in relation to the National Park boundary;
- 3 Where the site is located in relation to the Primary and Key settlements in the National Park; and,
- 4 What use classes are proposed on the site

8.4 In undertaking this review, we have considered the statutory plan for each neighbouring authority has been assessed, including the Local Development Plan for each local authority if the document has reached the 'Deposit' stage so that the most up to date position can be understood.

8.5 The closest employment allocations in **Powys** to the National Park are located within Brecknockshire, some distance from the main settlements within the National Park. These are also listed as 'local sites' within the Powys UDP meaning that they are very small allocations intended to support locally generated small scale demand. As such, they are not appropriate to support any of the employment needs of the National Park.

8.6 **Monmouthshire** Council have consulted on their Deposit LDP. The nearest employment sites located in close proximity to the National Park are located in Abergavenny. Six sites exist in close proximity to the National Park boundary although these are all existing employment sites which are protected through

the LDP because of the vital role they play within the economy of Monmouthshire. These cannot be expected to support the needs of the National Park.

- 8.7 **Carmarthenshire** Council are also at Deposit Stage of their LDP. Whilst three sites, in Bury Port, Rhosmaen and Fairfach contain employment allocations exceeding 1 hectare, these are located a long distance from the key settlements of the National Park and therefore cannot be relied upon to support the employment needs of the Park.
- 8.8 The **Rhondda Cynon Taf** LDP includes one employment allocation within close proximity to the National Park in Hirwuan. This allocation is an extension of an existing employment site which caters for the current employment needs of Rhondda Cynon Taf. Even if the site was to expand into the National Park area, this would continue to be considered as additional support for the needs of Rhondda Cynon Taf and not the National Park. In addition to this, the site is not well related to the Brecon Beacon’s key settlement nor does it provide the suitable use classes to meet the needs of the National Park.
- 8.9 **Merthyr Tydfil’s** LDP makes no employment allocations which are located close to the National Park.
- 8.10 It is helpful to pay some regard to employment sites adjoining the National Park however on review it is evident that the sites identified are not suitable to support any needs of the National Park. Their location or function are not favourable to that of the National Park and can therefore not accommodate any of the need identified. For this reason, the identified employment land requirements should be provided for in full within the National Park.

Assessment of Potential Employment Sites

- 8.11 As per the qualitative assessment of existing employment sites, this stage was based upon desktop analysis and site visits. As with the review of existing sites, no minimum size threshold was set for these sites, based on the premise that the BBNPA generally contains smaller scale sites.
- 8.12 The study team undertook the site visits and assessments based upon the broad criteria set out in Table 8.1.

Table 8.1 Site Assessment Criteria

Access	<ul style="list-style-type: none"> i. Road access ii. Public transport access iii. Public/cycle access
--------	---

Site Context	<ul style="list-style-type: none"> i. Proximity to residential area/community facilities ii. Brownfield/greenfield status iii. Adjoining uses iv. Relationship with built environment v. Proximity to infrastructure
Environment:	<ul style="list-style-type: none"> i. Landscape sensitivity ii. Opportunity to remove an eyesore iii. Ecology iv. TPOs v. Topography vi. Contamination vii. Flood risk viii. Water quality ix. Impact on agricultural land
Availability and Deliverability:	<ul style="list-style-type: none"> i. Viability ii. Site ownership iii. Pressures for other forms of development

Source: NLP Analysis

- 8.13 Only those potential sites which were highlighted by the Authority were surveyed for their suitability for employment use. The survey has not considered the site's suitability for any other use e.g. retail and residential, as this is beyond the scope of this Employment Land Review.
- 8.14 Appendix 4 includes a more detailed matrix setting out guidelines on how each broad category was assessed.
- 8.15 The outcome of this review was that each potential site was scored (for each criteria) between - - (very poor) and ++ (very good). Then based on the individual scaling given to each category, an overall score was given for each potential site.
- 8.16 The purpose of this review is to indicate the better performing attributes of potential sites relative to others in the National Park. Whilst this assessment

sets out the suitability of each site for employment use, it is up to the Brecon Beacons National Park Authority to decide which sites to allocate in the emerging LDP, taking account of the overall need for employment and other forms of development and the key priorities and objectives of the plan.

Findings – potential employment sites

8.17 A total of 10 potential employment sites were assessed. A full summary of the results are included in Table 8.3 overleaf and the detailed site proformas and location plans are appended to this report.

8.18 Considering the individual sites in hand and the scaling given for each criterion, each of the 10 sites were given an overall scale in terms of their suitability for employment use. Table 8.2 includes a summary of these overall scales and a breakdown of these are included below:-

- 1 Very good (++): 1 site;
- 2 Good (+): 3 sites;
- 3 Average (0): 4 sites;
- 4 Poor (-): 2 sites; and
- 5 Very poor (- -): 0 sites.

Table 8.2 Overall BBNPA Potential Site Scales

Level	Site ID	Area (Ha)	Overall Score
1	BREC 3 UDP Allocation Opp. High School	5.0	+
	BREC 4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	0.8	++
2	TAL2 UDP Allocation Hay Road	0.9	0
	TAL3 Mid Wales Hosp.	4.5	-
	HAY2 Land adj. Football Field	0.6	+
	HAY3 UDP Allocation Former Health Centre	0.7	+
	HAY4 Land Adj. Caemawr Cottages	0.2	0
	SENNY2 Adj. Defynnog Road	1.43	-
4	HIR1 Land adj. 5 th Av Hirwaun	5.8	0
Other	GLAN1 Cwrt Y Gollen	22.8	0

Table 8.3 Qualitative Analysis of Potential Employment Sites in BBNPA

Settlement Hierarchy	Site	Access			Site Context					Environment									Availability and Deliverability		
		Road Access	Public Transport Access	Pedestrian/cycle Access	Proximity to residential areas & community	Brown/Greenfield	Adjoining Uses	Relationship with Built Environment	Proximity to Infrastructure	Landscape Sensitivity	Removal of eyesore?	Ecology	TPOs	Topography	Contamination	Flood Risk	Water Quality	Impact on Agricultural Land	Viability	Ownership/site availability	Pressure for other forms of development
1	BREC 3 UDP Allocation Opp. High School	+	+	0	+	--	0	++	++	+	-	0	++	0	++	+	+	0	0	++	++
	BREC4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	++	-	-	0	--	++	++	+	++	+	++	++	++	++	++	0	++	-	++	++
2	TAL2 UDP Allocation Hay Road	++	-	++	-	++	+	++	+	+	+	++	++	++	0	+	0	++	-	+	++
	TAL3 Mid Wales	--	-	0	-	+	0	--	++	+	+	0	-	++	0	++	0	++	-	++	-

	Hosp.																					
	HAY2 Land adj. Football Field	+	-	0	+	--	+	0	+	++	0	+	++	++	++	++	++	0	0	-	++	
	HAY3 UDP Allocation Former Health Centre	+	0	0	++	+	-	++	+	+	0	++	++	++	++	++	+	++	0	0	-	
	HAY4 Land Adj. Caemawr Cottages	-	0	-	++	--	-	+	+	+	-	+	++	++	++	++	+	0	-	-	-	
	SENNY2 Adj. Defynnog Road	-	-	-	+	--	-	+	+	++	0	+	++	--	+	++	+	0	-	+	++	
4	HIR1 Land adj. 5 th Av Hirwaun	++	-	0	--	--	+	-	++	++	0	0	++	++	++	0	0	0	0	++	++	
Other	GLAN1 Cwrt Y Gollen	++	0	0	-	-	0	-	++	++	0	0	0	++	++	--	+	++	0	++	-	

Very good (++) Site

8.19 Out of the 10 sites assessed for suitability for employment, only 1 site was classed as ‘very good’ using the above criteria. This comprises a vacant (greenfield) building plot, located within the existing Enterprise Business Park, therefore its development would result in some clustering benefit.

8.20 It benefits from being located within the BBNPA’s identified Level 1 settlement – Brecon – a key settlement offering a readily available labour force, and is also located immediately adjacent to a key vehicular transport linkage – the A470. Although greenfield, this site is not used for agriculture. It does not suffer from any major development constraints and its development could result in an improvement to the current appearance of the plot. It is recognised that the fact that the adjoining land benefits from planning permission for a gypsy and traveller site may potentially affect its attractiveness but it is nevertheless considered to be generally suitable for employment use.

Table 8.4 'Very Good' (++) Sites

Level	Site ID	Area (Ha)	Overall Score
1	BREC 4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	0.8	++

Source: NLP Analysis

Good (+) Sites

8.21 3 of the 10 potential sites assessed for suitability were classed as ‘good’ (+). All 3 were located within the BBNPA’s Level 1 (Brecon) or Level 2 settlements (Hay-on-Wye) which resulted in sustainability benefits associated with access to labour force, local services and public transport. Most sites were relatively unconstrained in terms of issues such as topography, flooding, TPOs and contamination. However their proximity to sensitive uses such as residential, schools, colleges and hospitals would require a careful approach and in some instances they might result in the site only being suitable for Class B1 activities.

Table 8.5 'Good' (+) Sites

Level	Site	Area (Ha)	Overall Score
1	BREC 3 UDP Allocation Opp. High School	5.0	+
2	HAY2 Land adj. Football Field	0.6	+
	HAY3 UDP Allocation Former Health Centre	0.7	+

Source: NLP Analysis

Average (0) Sites

- 8.22 4 out of the assessed 10 potential sites were identified as 'average' (0) in their suitability for employment use.
- 8.23 The site at Hay Road, Talgarth was considered to be average in its suitability for employment use due to the likely cost of redeveloping a previously developed site, the possible contamination on the site and a concern over the market demand in this area, considering the presence of vacancies at the Talgarth Business Park,.
- 8.24 The site adjacent to Caemawr cottages was assessed as a standalone site, rather than as an extension to the adjacent site. Based on this, the site's greenfield status, reliance on the neighbouring site to enable access and its location adjacent to residential uses contributed to its overall average (0) classification.
- 8.25 The land adjacent to 5th Avenue, Hirwaun benefits from an extant planning permission for a sustainable waste resources recovery and energy production (includes B1 and B2 uses) (LPA Ref: 08/02488/FUL). In this assessment the Site was considered for its suitability for B use class only and it was found to exhibit a number of site constraints relating to flooding and ecology, which reduced its suitability for employment uses. Furthermore, although it is located within an existing Industrial Estate, the site is isolated from the settlement of Hirwaun reducing accessibility to local services and a labour force. Its location adjacent to the Penderyn Reservoir was also considered to potentially represent a risk to water quality.
- 8.26 The Cwrt-y-Gollen Site is a very large site, located alongside an A-road but some distance outside the settlements of Crickhowell and Glangrwyney. This relatively isolated location means that its current accessibility by sustainable forms of transport is poor and its relationship with the existing urban form is also poor. It is not well located in relation to existing significant residential areas, nor community facilities. In addition it also exhibits some site constraints associated which further reduce its suitability for employment purposes.

Table 8.6 'Average' (0) Sites

Level	Site	Area (Ha)	Overall Score
2	TAL2 UDP Allocation Hay Road	0.9	0
	HAY4 Land Adj. Caemawr Cottages	0.2	0
4	HIR1 Land adj. 5 th Av Hirwaun	5.8	0
Other	GLAN1 Cwrt Y Gollen	22.8	0

Source: NLP Analysis

Poor (-) Sites

- 8.27 2 out of the 10 potential employment sites were assessed as poor (-) in terms of their suitability for employment use.
- 8.28 The site adjacent to Defynnog Road is located immediately next to an existing Industrial Estate which contains a sawmill that acts as a bad neighbour activity and may therefore constrain the type of employment uses that might be appropriate. Furthermore the major constraint on this Site related to its steep topography which, when combined with the cost associated with delivering a new access directly off the A4067, was considered to represent a key factor which may adversely impact upon potential development viability.
- 8.29 The former Mid Wales Hospital site generated very different issues. Its isolation from local services and the nearest settlement, coupled with a constrained access were key factors resulting in the site's 'poor' (0) rating. Its constraints which include TPOs, ecology and contamination also compounded its suitability for employment uses.

Table 8.7 NLP Analysis

Level	Site	Area (Ha)	Overall Score
2	TAL3 Mid Wales Hosp.	4.5	-
	SENNY2 Adj. Defynnog Road	1.43	-

Source: 'Poor' (-) Sites

Site potential to accommodate waste facilities

- 8.30 BBNPA requested that we consider the potential suitability of the 10 potential employment sites to accommodate a local waste facility in line with emerging LDP Policy SP9: Waste.
- 8.31 Local waste facilities are defined in the Regional Waste Plan (RWP) Technology Strategy (see paragraph F5.2 and BBNPA Waste Issues Paper) as:
- 1 Clean materials recovery facilities;
 - 2 Transfer stations;
 - 3 Civic amenity; and,
 - 4 Construction and demolition exemption
- 8.32 In line with Policy 42 of the emerging LDP, in considering the Site's potential suitability for local waste facilities, consideration has been given to the:-
- 1 Sensitivity of existing uses on Site;
 - 2 Proximity of neighbouring properties and considerations relating to potential health or safety hazards; and,
 - 3 Accessibility.

8.33

Table 8.8 below contains a summary of the key considerations in respect of each of the existing employment sites:-

Table 8.8 Suitability for local waste facilities

Settlement Hierarchy	Site ID	Use Class	Suitability for Waste?
1	BREC 3 UDP Allocation Opp. High School	LDP Mixed Use Site - Suggested to be appropriate for B1 uses	Due to its proximity to sensitive residential and school uses, this site is not considered to be appropriate for B2 or as a local waste facility.
	BREC4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	LDP Employment Allocation (Other uses on the Industrial Estate are for sui generis, B1, or B8 uses)	There are no B2 uses in this estate and a local waste facility may yield some bad-neighbour issues, dependant on the nature of the proposed use. On this basis it is not considered that the site is likely to be appropriate for waste facilities.
2	TAL2 UDP Allocation Hay Road	LDP Mixed Use Site (Suggested to be appropriate for B1, some forms of B2)	Prominently located on a roadside approach into Talgarth. The site is also located close to some existing residential properties on the south-eastern boundary. A local waste facility may yield some bad-neighbour issues, dependant on the nature of the proposed use. On this basis the site is not likely to be appropriate however, it may benefit from some further investigation should a particular waste need be identified in the National Park.
	TAL3 Mid Wales Hosp	Not allocated in the LDP Suggested to be potentially suitable for B1, B2 or B8 uses	This site is located away from existing community facilities but is located adjacent to some existing residential uses and suffers from a constrained access, which is not suitable for frequent passages of Heavy Goods Vehicles (HGVs). However the site may be appropriate for some forms of local waste facility dependant on the transport requirements and residential amenity impacts, although further investigation is required should a particular waste need to be identified in the National Park.
	HAY2 Land adj. Football Field	LDP Mixed-Use Site - Suggested to be suitable for B1 uses.	The site is located close to existing residential uses and its access road runs through residential areas. Therefore it is not likely to be suitable for a local waste facility.
	HAY3 UDP Allocation Former Health Centre	Allocated in the LDP as a mixed-use site Suggested to be	The site is located within the built-up area of Hay-on-Wye, close to existing residential uses. Its access is not appropriate for heavy goods vehicles. It is not considered suitable for a local waste facility.

Settlement Hierarchy	Site ID	Use Class	Suitability for Waste?
		appropriate for B1 uses	
	HAY4 Land Adj. Caemawr Cottages	Allocated in the LDP as a mixed-use site Suggested to be appropriate for B1 and C3 uses	The site is located within the built-up area of Hay-on-Wye, close to existing residential uses. Its access is not appropriate for heavy goods vehicles and so it is not considered suitable for a local waste facility.
	SENNY2 Adj. Defynnog Road	Allocated in the LDP as a mixed-use site for A1, A2, A3, B1, B2 and B8.	Steep topography and proximity to residential uses is considered to make this site as a whole unsuitable for a local waste facility.
4	HIR1 Land adj. 5 th Av Hirwaun	Allocated in the emerging LDP as B1, B2 or B8	The site is located away from existing residential areas and community facilities. Its location within an existing Industrial Estate is likely to mean that it may be suitable for a local waste facility, subject to further investigation.
Other	GLAN1 Cwrt Y Gollen	Not allocated in the LDP	This large site is located away from existing community facilities, off an A road. Considering its large area, part of the site may be suitable for some form of local waste facility, subject to further investigation.

Source: NLP Analysis from site visit and BBNP survey undertaken to inform the Employment Issues Paper (September 2010)

8.34 Based on the above initial assessment, should a particular need be identified in the National Park for a local waste facility, 3 of the 10 potential employment sites may comprise suitable locations, subject to further investigation once the exact form of waste facility is known. These are as follows:

- 1 HIR1 Land adj. 5th Av Hirwaun
- 2 GLAN1 Cwrt Y Gollen
- 3 TAL3 Mid Wales Hosp

8.35 In particular the HIR1 Site is shown to benefit from planning permission for a sustainable waste resources recovery and energy production (includes B1 and B2 uses) (LPA Ref: 08/02488/FUL) therefore this Site forms an existing commitment.

8.36 One other site (TAL2 UDP Allocation Hay Road) is considered not likely to be appropriate for a local waste facility but may benefit from some further investigation should a particular waste need be identified in the National Park.

Conclusion

8.37 This chapter provides an indication of the suitability of the identified 10 sites for employment (and waste) uses.

Employment (B use class)

8.38

Based on this criterion, those sites categorised as ‘very good’ or ‘good’ are generally considered suitable for employment uses (see table 8.9 below). However together these sites add up to some 7.1 hectares which is significantly more than the forecast need for employment land over the LDP period and therefore it is likely that some suitable sites may therefore not need to be required for allocation. The selection of which sites to allocate will depend upon a range of factors, including:

- 1 The suitability of individual sites for different forms of employment uses;
- 2 Their location;
- 3 Their size;
- 4 Competing demands for development; and,
- 5 The LDP vision and other objectives.

Table 8.9 Recommended Future Employment Sites

Level	Site	Area (Ha)	Overall Score
1	BREC 4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	0.8	++
	BREC 3 UDP Allocation Opp. High School	5.0	+
2	HAY2 Land adj. Football Field	0.6	+
	HAY3 UDP Allocation Former Health Centre	0.7	+

Source: NLP Analysis

8.39

We note that SENNY2 (Adjacent to Defynnog Road) is allocated in the emerging LDP, however the findings of the site assessment categorises this Site as ‘poor’ and therefore we recommend that consideration is given to potentially de-allocating this Site.

Waste

8.40

An initial assessment of the 10 potential employment sites shows that 3 sites may be suitable for some form of local waste facility, subject to further investigation and should a need arise for such a waste facility. These sites are as follows:

Table 8.10 Potential Local Waste Facility Sites

Level	Site	Area (Ha)	Overall Rating
2	TAL3 Mid Wales Hospital	4.5	
Other	GLAN1 Cwrt Y Gollen	22.8	

	HIR1 Land adj. 5 th Avenue Hirwaun	5.0	
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Source: NLP Analysis

- 8.41 One other site (TAL2 UDP Allocation Hay Road) is considered not likely to be appropriate for a local waste facility but may benefit from some further investigation should a particular waste need be identified in the National Park.
- 8.42 It is important to note that none of these sites were amongst the best employment sites and so it may be that they are not brought forward for employment development and therefore unavailable for waste purposes. This matter should be considered in more detail by the National Park Authority as part of the decision making process, once the exact scale and form of any waste requirements are known.

9.0

The Role of Non-B Class Sectors in the Local Economy

Introduction

9.1

An important characteristic of the BBNPA economy is its reliance upon non-B Class sectors. This is demonstrated by the fact that approximately 70% of workers are employed outside of the traditional employment sectors.

9.2

In light of this local context and in view of the emerging new PPW chapter 7 which seeks to ensure the planning system considers the needs of the entire economy and not just those defined as within the B class uses, this chapter considers this broader context, focusing in particular on:

- 1 Agriculture;
- 2 Tourism;
- 3 Public Sector; and,
- 4 Retail.

9.3

It draws upon the employment forecasts that were prepared by Experian Business Strategies Ltd, discussions with consultees and a review of other key documents.

Agriculture

9.4

Farming is a dominant land use in the BBNP – accounting for some 85% of the National Park’s area. Agriculture exerts an important influence upon the National Park’s landscape and wildlife, and occupies a vital social and economic role within the local area.

9.5

The importance of agriculture and other land-based activities to the BBNP is explicitly recognised in the National Park Management Plan (2010-2015) which establishes a set of vision statements to help guide the Authority’s actions over the coming years. These include:

“By 2030... A living landscape where people can earn a living from the land in an innovative and sustainable manner, for example through farming, but also in new ways such as through renewable energy production, for the benefit of the environment, economy and local communities”.

9.6

These statements are split into individual aims, one of which relates to farming as well as other rural businesses:

“LC6: A mixture of farming, small rural businesses, traditional land-use businesses, land management organisations, local services and sustainable tourism industries will maximise the economic potential of the Park’s special qualities whilst promoting resource conservation”.

9.7 This illustrates the Management Plan’s comprehensive approach to maximising the economic potential of BBNP through the encouragement of a range of sectors.

9.8 Agriculture is a major contributor to the local economy and accounts for 5% of all employees in BBNP, compared with 2% across Wales. Although employment levels within agriculture have decreased over the recent years (see table 9.1 below) – a picture reflected nationally also – forecasts indicate that the contribution of agriculture over the longer period (up to 2031) is likely to increase slightly within BBNP (see table and figure 9.1).

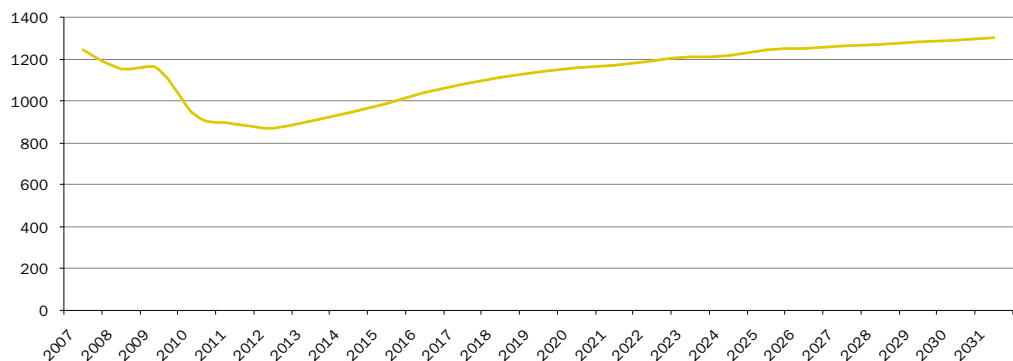
Table 9.1 Agriculture Jobs in BBNPA and Wales

BBNPA Employees (Nos.)			
Industry	1997	2007	2012
Agriculture, Forestry & Fishing	1,500 (9%)	1,240 (7%)	870 (5%)
Wales Employees			
Industry	1997	2007	2012
Agriculture, Forestry & Fishing	43,940 (4%)	37,160 (3%)	33,400 (2%)

Source: Experian Business Strategies Limited 2012

9.9 In terms of actual numbers of jobs, agricultural jobs in the Brecon Beacons are forecast to increase by 4.8% to 1,300 jobs in 2031 (from 2007).

Figure 9.1 BBNPA Agricultural Job Forecasts (2007-2031)



Source: Forecasts based on Spring 2012 Experian Regional Planning Service

9.10 Set against this mixed picture of declining direct economic contribution, followed by a forecasted slight growth within BBNP, it is relevant to recognise the challenges facing agriculture which may impact on the future wellbeing of the industry. In recent years these have included:

Physical challenges such as:

- 1 Livestock health problems such as Bluetongue, Foot and Mouth Disease, BSE and bovine TB.

Financial challenges such as:

- 2 Changing levels (and emphasis) of agricultural subsidies;
- 3 Fluctuations in interest rates; and,
- 4 Changing levels of competition.

Cultural challenges such as:

- 5 Sale of agricultural holdings to non farmers resulting in changes to the socio-economic composition of communities and the shape of agriculture within BBNP;
- 6 Absent successors for some farms risks a loss of skills; and,
- 7 High average age of farmers in Wales potentially reducing the scope for innovation due to risk adverse attitudes

9.11 All these challenges raise issues over the future well-being of the industry. However, it is anticipated that the agricultural sector will continue to be important for the local economy and planning policies should ensure that it is supported in order to safeguard the wellbeing of the wider economy. These policies should also encourage innovation and appropriate diversification in order to help the sector to meet future challenges.

Diversification

9.12 Farm diversification has been an important trend within the agriculture sector in BBNP and is supported under UDP Policy ES17 and emerging LDP Policy 20, subject to a range of criteria that seek to ensure that the proposals are appropriate to the local context.

9.13 Through consultation with local agents and stakeholders, as well as examination of the non B use planning applications since 2001, it is evident that a range of diversification schemes have taken place, most notably relating to the tourism sector. These have included caravan sites, golf course and tourist attractions.

9.14 The key challenge for future planning policies will relate to the need to achieve a balance between supporting agricultural diversification, whilst also encouraging the practice of agriculture. This might be achieved by diversification measures which are interconnected with the practice of agriculture by adding value to the farming activities, for example ice cream making parlour in connection with an existing dairy farm, and farm shops which sell produce from local agricultural holdings.

Conclusion

9.15 It is clear that the issues facing farming today are not generally planning issues and that they are mostly wider ranging matters that have an impact at the national and international levels. Nevertheless, planning policy does have role in ensuring the agricultural sector can respond to the challenges it faces as

well as make a contribution to the wider economy of the BBNP through supporting the agricultural industry and diversification.

- 9.16 Diversification has a major role in farming in BBNPA today and whilst a large amount of diversification applications appear to relate to the tourism sector the contribution of other activities are also noted – equestrian activities, craft workshops, food and drink processing and industrial workshops. However it is important that agricultural diversification is supported in tandem with supporting traditional farm practices, to ensure that the decline of agriculture is not perpetuated through policy.

Tourism

- 9.17 Tourism is very important to the BBNPA and in 2006 the BBNPA was visited by some 3.7 million people (STEAM, 2006)³.
- 9.18 According to the ‘Survey of Current Tourist and Visitor Markets 2005’ for over 92% of visitors the main influence on a decision to visit BBNPA was scenery and peace and quiet. This survey also confirmed the main BBNPA tourist attractions as being:

- 1 Specific attractions 29%
- 2 Hay bookshops 23%
- 3 Brecon Canal 21%
- 4 Cathedral / churches 19%
- 5 Local castles 11%

Visitor Levels

- 9.19 The latest STEAM data relevant to the BBNP is dated 2006. According to this data, the BBNPA enjoyed the following visitor numbers between 2003 and 2006:-

³ STEAM (The Scarborough Tourism Economic Activity Monitor) is an economic assessment model used to estimate the economic value of tourism in the BBNPA. The latest data available for the BBNPA is dated 2006 and this has been used for this Study.

Table 9.2 BBNPA Tourism Numbers

Tourism Number (thousands)	2003	2004	2005	2006	% Difference 2003 - 2006
Serviced Accommodation	116	144	138	131	+13%
Non-Serviced Accommodation	55	56	53	56	+2%
Staying with Friends/Relatives (SFR)	50	50	50	50	No change
Day Visitors	3,140	3,438	3,586	3,534	+13%
TOTAL	3,361	3,689	3,827	3,771	+410 (+12%)

Source: STEAM, 2003-2006 data

- 9.20 Table 9.2 above shows that the total number of tourists to the Brecon Beacons has gradually increased year on year during this period. Day visitors are shown to represent a particularly significant component of tourism to BBNP, consistently accounting for over 90% of visitors. This likely to be a result of the location of the Brecon Beacons National Park, relatively close to centres of populations such as Cardiff, Merthyr Tydfil and the Welsh Valleys. However considering how to encourage visitors to stay overnight, so as to maximise the income and economic benefits for the BBNP and minimise the associated transport implications, represents a key challenge for the future. This may be achieved by improving the quality or promotion of high quality overnight accommodation and sustainable transportation links within the National Park.

Tourism Expenditure

- 9.21 Tourist expenditure in BBNP was calculated as £133 million in 2006. This has increased by 17% since 2003, and has increased year on year (see table 9.3 below).

Table 9.3 Tourism Expenditure in the BBNPA

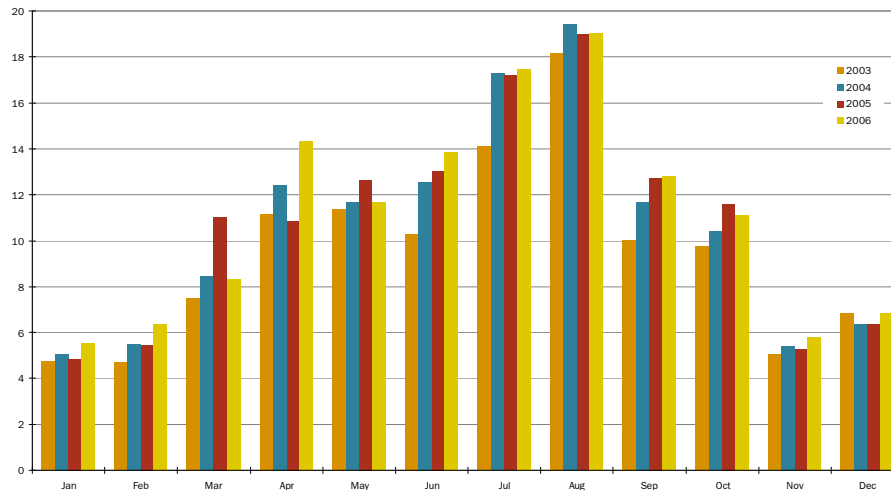
	2003	2004	2005	2006	Difference
Tourism Expenditure (£m)	114	126	130	133	+19 (+17%)

Source: STEAM 2003-2006

- 9.22 The pattern of tourist expenditure during this period is shown in figure 9.4 below. Perhaps unsurprisingly July and August are the two peak months for expenditure, although expenditure in the off-peak and shoulder months of September, November, January and March has increased year-on-year. Investigating ways in which tourists can be attracted during these off-peak seasons should be investigated in the future, to help spread the economic

benefits of tourism throughout the year. This may be through encouraging new tourist events or activities during off-peak times or promoting an enhanced range of tourist facilities that are not weather dependant, such as spa hotels.

Figure 9.2 Tourism Expenditure 2003-2006 in BBNPA (by month, £million)



Source: STEAM 2003-2006

Economic Impact

9.23

The latest STEAM (2006) considered the direct and indirect employment related to tourism in the BBNPA. Table 9.4 below shows that between 2003 and 2006 the total (direct and indirect) employment generated by the tourism sector increased by some 6%.

Table 9.4 Direct and Indirect Employment associated with Tourism in the BBNPA

Direct Employment (Full Time Equivalent)	2003	2004	2005	2006	Change %
Accommodation	710	710	710	710	No change
Food and drink	630	690	690	690	+8%
Recreation	250	270	280	270	+8%
Shopping	440	480	480	480	+9%
Transport	200	220	220	220	+8%
Total Direct Employment	2,240	2,370	2,380	2,370	+6%
Total Indirect Employment	520	560	560	570	+8%
TOTAL	2,760	2,940	2,950	2,940	+6%

Source: STEAM 2003-2006

9.24 The largest growth during this period was in relation to shopping, closely followed by food and drink recreation and transport. Further enhancements in these sectors might help to increase tourism income.

9.25 In order to understand how this employment contribution may change in the future, the employment projections provided by Experian Business Strategies can be used to provide a proxy for how the employment associated with the tourism sector might change in the coming years. As the forecast do not provide a category for tourism, we have examined the forecasts for the following (tourism related) sectors:

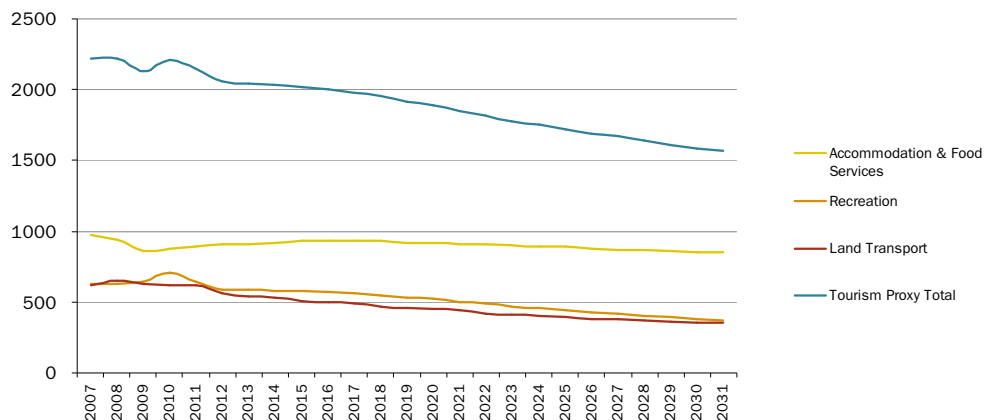
- 1 Accommodation and food services;
- 2 Recreation; and,
- 3 Land transport.

9.26 Some of the employment in these sectors might not be geared towards the needs of tourists whilst some employment in other sectors may contribute towards the tourism industry. However, we consider that this analysis provides a reasonable indication of likely future employment change in tourism.

9.27 In line with this approach figure 9.3 provides an indication of the forecasts for these individual sectors, all of which are shown to slightly decrease over the longer period up to 2031.

9.28 The blue line in the graph is the sum of these individual sectors. This shows an anticipated reduction in actual jobs over the longer period up to 2031, although it should be set against the context of an overall reduction in the total jobs within the BBNP (anticipated 12% reduction between 2007-2031). However, given the local importance of the tourism sector, this decline is a matter of some considerable concern and action should be taken to help support and to enhance the economic contribution of this key sector.

Figure 9.3 BBNP Tourism Jobs Proxy



Source: Experian Business Strategies Ltd 2012

Conclusion

- 9.29 Tourism will still continue to be an important element of the BBNP local economy, although its direct contribution in terms of jobs may decrease slightly over the longer period. As such it will be important that planning policies seek to continue to support this sector, as well as the things which attract tourists to the National Park, most particularly its scenery and peace and quiet.
- 9.30 Going forward, a priority should be given to increasing the value of tourism to the area. This could be undertaken through a number of ways including:
- 1 Encouraging a greater number of tourists to stay overnight in the National Park, rather than just visit for the day by improving and/or promoting over-night accommodation offer.
 - 2 Promoting and/or diversifying the tourism offer during off-peak times in the season.
- 9.31 In tandem with this, policies should also seek to continue to encourage sustainable forms of transport for day tourists and ensure any other potentially negative impacts of tourism are managed and mitigated where necessary.

Public Sector

- 9.32 The public sector is an important provider of jobs within the BBNP. According to figures provided by Experian, the public administration and defence, health and education sectors accounted for 5,800 jobs in the BBNPA in 2012 (35% of all jobs within the National Park). This figure is set to rise to 6,650 jobs in 2031 (42% share of BBNP jobs), although the reality of public sector budget cuts might result in this level of forecast growth not being realised.
- 9.33 Whilst there might be some health and education jobs within the private sector, these are not expected to be particularly substantial in number and so these sectors are viewed as a reliable proxy indicating public sector employment. A small proportion of public sector jobs are included within the B1 category of employment growth but the majority of jobs in the public administration, health and education sectors fall within the category of non-B class jobs.

Public Administration and Defence

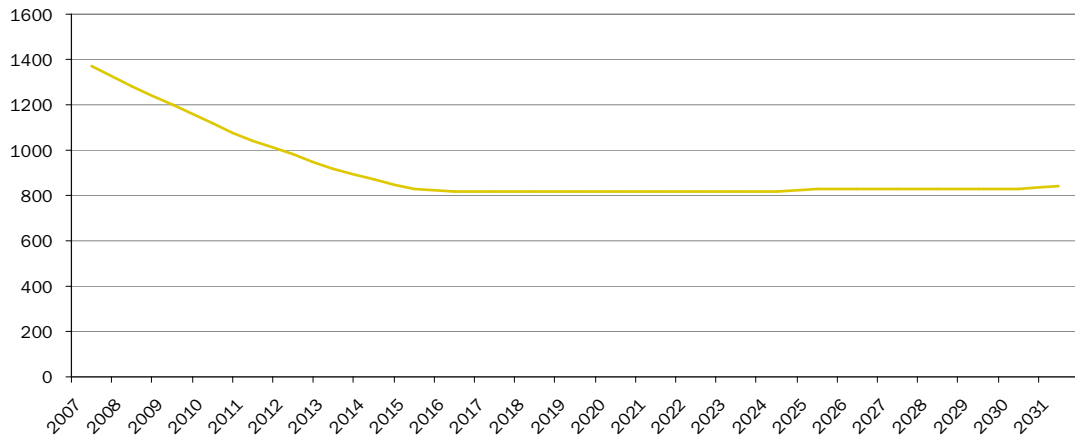
- 9.34 The Experian forecasts show that public administration and defence employment in the BBNPA accounts for 980 jobs (6% of all jobs within the National Park - the same as the average for Wales as a whole).
- 9.35 Key public administration and defence employers within the National Park include:
- 1 The Brecon Beacons National Park Authority;
 - 2 Powys County Council;
 - 3 Welsh Government;

- 4 Dyfed Powys Police; and,
- 5 Ministry of Defence.

9.36 In particular the BBNPA office at Brecon is a key public sector employer within the local area and employs approximately 130⁴ people who provide a range of services relating to planning, ranger services, environmental education and landscape management. The Powys County Council office at Brecon is also a key employer, as is the Army Barracks in Brecon and Sennybridge.

9.37 Experian forecasts show that the number of public administration and defence jobs in the BBNPA are set to decrease up to 2016, and then remain at a constant level up to 2031 (820 jobs). Nevertheless, this still comprises a significant percentage of the employment within the National Park and therefore is a critical factor for its well-being of the area.

Figure 9.4 BBNPA Public Administration and Defence Job Forecast (2007-2013)



Source: Experian Business Strategies Limited 2012

Education and Healthcare

9.38 In 2012 approximately 29% (4,820) of public sector jobs within the Brecon Beacons National Park fell within the education and healthcare categories (Experian Business Strategies Limited, 2012).

9.39 The forecast of employment growth in BBNP undertaken by Experian identifies the following changes in the number of jobs in the education and healthcare sectors over the period from 2007 to 2031:

⁴ Brecon Beacons National Park Authority website:- <http://www.breconbeacons.org/the-authority/>

Table 9.5 Employment Change in Healthcare and Education Sectors in BBNPA, 2007-2031

	BBNPA No of Jobs		
	2007	2019	2031
Education	1,770 (10%)	1,960 (12%)	2,280 (15%)
Healthcare and Social Care	2,620 (15%)	3,130 (19%)	3,530 (23%)
TOTAL	4,390 (25%)	5,090 (31%)	5,810 (37%)

Source: Experian Business Strategies Limited 2012

9.40

The above table shows a forecast increase of 1,420 jobs between 2007 and 2031. In terms of the overall BBNP employment level, the proportion of health and education jobs is set to increase by 12% (from 25% in 2007 to 37% in 2031). Therefore it is clear that this sector of jobs will become increasingly important to the BBNP local economy, although precise changes in education and healthcare employment can be difficult to predict as they are largely influenced by:

- 1 **Changes in policies** associated with changes in political priorities and decisions taken by Local Health Boards and Education Boards may all have a bearing on the future level of employment associated with this sector. However the nature of these changes, and the associated implications, are extremely difficult to anticipate at this stage; and,
- 2 **Changes in need for service.** The level of provision of education and healthcare over the period to 2031 will undoubtedly be influenced by the need arising for services. The changing employment levels within the education and healthcare sectors (increase from 25% contribution to 37%, increase of 1,420 actual jobs) accords with the trends that would be expected in view of the anticipated ageing of the local population.
 - i The Welsh Government population projections (2008 based) indicate that the number of people that are over 65 years in the BBNPA is predicted to increase by 45% between 2008 and 2023 - in actual numbers this is equivalent to 3,200 people. This is likely to place increasing pressure upon existing local health facilities, necessitating an increased staffing requirement.

- ii By contrast, the Welsh Government population projections (2008 based) forecasts the population of under 16s to decrease by 14%, which equates to a decrease of 700 children over the same period (2008-2023). This change is likely to have some impact on the staffing requirements within the BBNPA education sector, although this may be realised over a longer period⁵.

9.41 However against this context is it worth noting that the BBNPA is not a local education authority or a local health board, rather these provisions fall outside the National Park's remit. Furthermore, it must be recognised that the various education and health catchment areas do not accord with other administrative boundaries and therefore these services may serve people who live within the National Park, as well as outside the National Park – therefore the impacts of population changes within the National Park may not directly reflected in terms of jobs generated.

Conclusion

9.42 The public sector accounts for a relatively large proportion (25% increasing to 37% up to 2031) of total employment in the BBNP. By way of comparison, the employment yielded by B1, B2 and B8 uses over the same period accounted for some 35% of BBNPA jobs in 2007 and is forecast to reduce to less than the public sector – at 26% of total BBNP jobs by 2031. With this in mind, and despite some uncertainties in the direction of policy and likely cuts in public sector finances in the longer term, the public sector is expected to remain an important element of BBNPA's economy. Indeed LDP policies should seek to ensure new and existing public services are provided over the Plan period. As public sector finances are cut, there will be increasing pressure to deliver 'more with less' therefore any future expenditure should be prioritised to ensure those areas in most need are met but also that other (private) funding sources are also explored.

Retail

9.43 Whilst this employment land study is not intended to forecast the floorspace requirements for new retail facilities, the forecasts of employment growth that have been prepared by Experian are helpful in providing a broad indication of the anticipated levels of likely change within this sector and its contribution to the long term direction of the BBNPA economy.

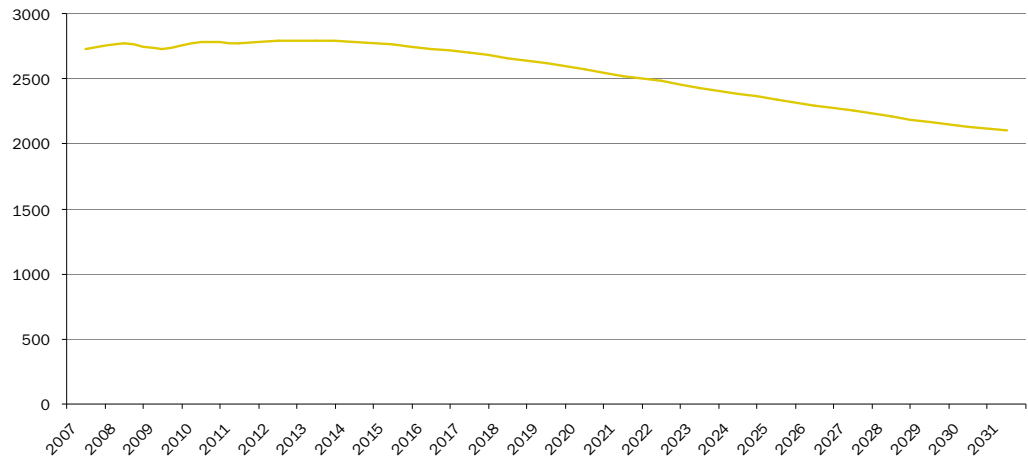
9.44 In 2012, the retail sector accounted for some 17% of jobs in the Brecon Beacons. This is the highest share by any individual sector, equal only to the

⁵ For further information on the demographic implications of the Welsh Government 2008 based Population and Household Projections, please see Scenario A of the NLP Assessment of Future Need for Housing' (July 2012)

jobs generated in relation to health and social care. This relatively high level of employment is associated with the National Park's tourism role.

- 9.45 In terms of future changes to the economic role of retail, Experian forecast that over the period from 2007 to 2031, employment levels in the retail sector will decrease from 2,790 jobs (17% of total BBNPA jobs) in 2012 to 2,100 in 2031 (14% of total BBNPA jobs).

Figure 9.5 Retail Jobs in BBNPA (2007-2031)



Source: Experian Business Strategies Limited 2012

- 9.46 The BBNP's current retail provision is focussed within the centres of Brecon, Hay-on-Wye, Crickhowell and Talgarth. The nature of this current retail provision is largely small-scale and concentrated on serving the day-to-day needs of the local community and some tourists. Some larger-scale supermarkets are located within Brecon and Hay-on-Wye however. Considering this predominantly small-scale (existing) retail provision and the relatively small settlement sizes within the National Park, it is considered that there would be limited demand for a large-scale retail development within the National Park in the near future. This is especially true considering the BBNPA's proximity to larger settlements such as Merthyr Tydfil and Abergavenny which meet some of the National Park's retail demand.
- 9.47 However, future planning policies within the LDP will need to ensure the vitality and viability of the BBNPA's centres to help nurture the retail industry within the BBNP. However these policies will need to be considered against the need to protect and preserve the environmental quality of the National Park.

Conclusion and Recommendations

This Employment Land Study has been commissioned by the Brecon Beacons National Park Authority to inform its forthcoming Local Development Plan (LDP). It is intended to assist the National Park Authority in its assessment of the anticipated future direction of the economy and, in so doing will inform its decision making process regarding the identification and development of land.

The Local Context

The BBNPA extends to 520 square miles (1,344 square kilometres) and stretches as far as Ffairfach (Carmarthenshire) in the west and Llanfihangel Crucorney (Monmouthshire) in the east. The BBNP also spans some nine Local Authority areas including Powys, Monmouthshire and Rhondda Cynon Taff.

This Study has found that the National Park has a number of defining characteristics which influence the form and growth of the economy within the National Park.

In 2010 the population of the National Park was estimated to be 32,367 and the BBNP is forecast to experience a small population increase (1.9%) between 2008 and 2028. This is compared with a national population increase of 11%.

Over the next 20 years, the number of pensioners is set to increase significantly, but the number of working age people and children is expected to decrease.

In 2001 there were 10,100 people of working age within BBNP, of which 65.2% were economically active. This is compared with 70.8% at the national level. Economic activity rates vary considerably between the different LA components of the BBNPA – highest levels were in Monmouthshire (72.1%) and the lowest was in Rhondda Cynon Taff (62.5%). Similarly the number of people who are self-employed is calculated as being around 23.3%, compared with 12.6% in Wales as a whole, reflecting the small-scale businesses prevalent in the National Park.

Not only is the BBNPA's economy dominated by small scale businesses, it is also dominated by non B Class activities, most significantly:

- 1 The public sector (health, education and public administration);
- 2 Tourism;
- 3 Agriculture; and,
- 4 Retail.

These sectors account for around 70% of the employment within the National Park. It is anticipated that they will continue to account for a large proportion of future employment within the Brecon Beacons.

- 10.9 This composition of employment in non-B Class uses was found to reflect the current supply of employment land in the BBNPA with the level of B Class employment space and the rate of new B Class employment development being relatively limited, in comparison to that associated with non-B uses. Very few instances of recently permitted losses to the B use class floorspace or refusals for development of new B use class floorspace were identified. This was considered to be indicative of the BBNPA's policy stance, which seeks to protect existing employment land, but is also reflective of a limited demand for existing B use classes to be redeveloped into alternative uses.

Consultation

- 10.10 Consultation was undertaken with a range of agents, stakeholders and local businesses within the BBNPA to inform this Study. Key points were as follows:-

1 Local agents

- i Highlighted prominence of home-grown, local SME businesses within the BBNPA;
- ii Considered lack of start up premises within the BBNPA;
- iii Considered to be no need for new offices within the BBNPA;
- iv Particular hot spots for businesses were identified as being within Brecon and Hay-on-Wye;
- v Emphasised common occurrence of agricultural diversification schemes, particularly those in relation to tourism; and
- vi Increased instances whereby larger agricultural holdings are being divided up and sold as small holdings.

2 Local businesses

- i Experienced staffing issues – in terms of finding staff with the requisite skill set and qualifications;
- ii Highlighted importance of broadband connectivity; and
- iii Identified barriers to business expansion included lack of planning flexibility, high costs associated with rents, land and service charges, bureaucracy and lack of suitable premises.

3 Tourism/agricultural businesses

- i Observed lack of small independent hotels and bed and breakfasts in certain towns; and
- ii Observed lack of restaurants in towns and villages.

Existing Employment Locations

- 10.11 The study assessed 9 existing B Class employment sites in the National Park using a Site Assessment Criteria matrix which allowed scores between ++ and - - (++ = very good and - - very poor) to be awarded for a variety of issues relating to location, access, quality, market factors and local context.

- 10.12 Using this criteria, the quality of the existing portfolio was found to be relatively high with 67% of sites reviewed as ‘very good’ or ‘good’ and the remaining sites being classed as average (33%). No ‘poor’ or ‘very poor’ sites were identified.
- 10.13 In light of these findings, it is not considered that any of the identified employment sites should be released for non-B Class purposes and it is recommended that the LDP should retain the existing policy position relating to the protection of existing employment land for business purposes. LDP policies should only seek to resist the inappropriate redevelopment of existing business premises for alternative purposes unless there are clear reasons to justify any such loss.
- 10.14 These same sites were also considered for their suitability to accommodate a local waste facility. It was concluded that there are 5 sites which may be appropriate for further investigation, provided the form of local waste facility is will yield minimal bad-neighbour issues.

Employment Based Space Requirements

- 10.15 In seeking to understand the amount of employment land that is likely to be required within the Brecon Beacons over the remainder of the LDP period, it is important to consider future shape of the local economy and to understand how this would impact upon possible land allocations.
- 10.16 Based upon our analysis of the current economic context, discussions with consultees and an assessment of potential future economic trends, we anticipate that the Brecon Beacons will continue to be characterised by the following economic characteristics:
- 1 Small scale businesses, predominantly occupying reasonably small units.
 - 2 Demand for business incubator, start-up and follow-on space in order to encourage business formation and development.
 - 3 Locally owned and operated businesses with limited inward investment from elsewhere.
 - 4 A focus upon environmental and quality of life considerations amongst those that move into the Brecon Beacons to start new businesses.
 - 5 Demand to upgrade or replace existing facilities which no longer provide the level of quality that is sought by businesses.
 - 6 Demand for business premises to be concentrated within the main settlements but on generally small scale sites – rather than the release of a single, large scale facility.
 - 7 Demand for business premises to have a low environmental impact.
 - 8 Continued dominance of non-B Class sectors with all key sectors continuing to be outside of the traditional “employment” activities.
 - 9 A more limited level of employment growth than was experienced in the pre-recession period from 1997 to 2007.

10 A lower level of local economic growth than is anticipated within Wales as a whole.

- 10.17 These characteristics all point towards the reality that only a small level of B Class employment land would need to be allocated for employment purposes, although further development could come forward on windfall sites and through changes of use and conversions.
- 10.18 In the light of this, we consider that the low growth, policy-on scenario provides the most appropriate basis for the identification of the amount of land that is required for employment purposes over the remainder of the LDP period. **We recommend that the LDP should make provision for the development of 1.5ha of land for B Class employment purposes between 2012 to 2022.** This amount is in addition to that which has been developed over the first 5 years of the LDP period and should be regarded as a minima rather than a maxima.
- 10.19 It is also recommended that the delivery of employment land should be monitored and reviewed regularly throughout the LDP period to inform whether or not any additional sites should be brought forward. The potentially important role of windfall (employment) development is also recognised and future LDP policies should support business and economic development, so long as it reflects the environmental sensitivity of the area and does not undermine the viability or deliverability of allocated employment sites.

Potential Employment Locations

- 10.20 Following our recommendation to make provision for 1.5 ha of land for B Class employment purposes between 2012 and 2022, the Study assessed 10 potential B Class employment sites in the National Park. This assessment used a Site Assessment Criteria matrix which allowed scores between ++ and -- (++ = very good and -- very poor) to be awarded for a variety of issues relating to location, access, quality, market factors and local context.
- 10.21 Using these criteria, the quality of the potential portfolio was found to be mixed. 40% of sites were reviewed as 'very good' or 'good', 40% were average, whilst 20% were categorised as poor.
- 10.22 Those sites categorised as 'very good' or 'good' are generally considered suitable for employment uses although add up to some 7.1 hectares (see table 10.1 below), which is significantly more than the forecast need for employment land over the next 10 years.

Table 10.1 Recommended Future Employment Sites

Level	Site	Area (Ha)	Overall Score
1	BREC 4 DBR-BR-E1 Plot at Enterprise Business Park, Brecon	0.8	++
	BREC 3 UDP Allocation Opp. High School	5.0	+
2	HAY2 Land adj. Football Field	0.6	+
	HAY3 UDP Allocation Former Health Centre	0.7	+
	TOTAL	7.1	

Source: NLP Analysis

10.23 This may mean that some suitable sites may not be allocated for this reason, or some sites may be investigated for alternative uses or a mixture of uses, nevertheless the decision regarding the actual amount of employment land to be allocated and which sites to allocate should be taken by the BBNPA.

10.24 These 10 potential sites were also considered for their suitability to accommodate a local waste facility. Of the 10 sites examined, 4 were considered to warrant some further investigation, should a need be identified for such a facility. These sites are as follows:

- 1 TAL3 Mid Wales Hospital;
- 2 GLAN1 Cwrt-Y-Gollen;
- 3 HIR1 Land adj. 5th Avenue Hirwaun; and,
- 4 TAL2 UDP Allocation Hay Road.

10.25 However, it is recognised that these sites were not amongst the best employment sites and so it may be that they are not brought forward for employment development and therefore unavailable for waste purposes. This matter should be considered in more detail by the National Park Authority as part of the decision making process, once the exact scale and form of any waste requirements are known.

Recommendations

10.26

This report has set out a series of conclusions about the economy in the BBNPA. It has shown that, despite being reliant on locally based SMEs both within the B use class and non B use class sectors, the economy is reasonably strong. The importance of non B use classes to the local economy is noted and interlinked with the high quality environment of the National Park. As the National Park Authority progresses with its LDP, we conclude by setting out the following key recommendations:

- 1 All LDP employment policies should seek to protect and enhance the quality of the environment.
- 2 There is a need to make provision for the development in the emerging LDP of 1.5ha of land for B Class employment purposes between 2012 and 2022. This should relate to smaller-scale sites of 0.5 hectares and above (requiring an amendment to Policy SP12), reflecting the observed need for smaller, start-up units. This 1.5 ha provision should be viewed as a minima rather than a maxima and it is recommended that the sites identified in chapter 8 should be considered first for potential allocation and consideration should be given to de-allocating SENNY2 Adjacent to Defynnog Road which is categorised as 'poor'. However the decision on which sites to allocate will need to be undertaken by the BBNPA.
- 3 Provision for new employment provision should be focussed at higher order settlements such as Brecon and Hay-on-Wye, reflecting identified market demand and maximising sustainability benefits.
- 4 Table 7.18 indicates that the 1.5 ha provision should comprise of the following:
 - 0.9 ha B1 use class
 - 0.6 ha B8 use classHowever these amounts should be considered a minima rather than a maxima.
- 5 LDP policies should seek to allow for B use class employment development on windfall sites provided the site is located in an appropriate location and subject to specific criteria relating to its scope and potential importance.
- 6 Particular encouragement should be given to the provision of smaller start-up units.
- 7 LDP policies should adopt a positive criteria based approach which seeks to allow for appropriate conversions/changes of use for B use class employment proposals, as well as employment generating non B uses.
- 8 LDP policies should seek to adopt a positive and flexible approach with regard to the extension or up-grading of existing business premises, where appropriate.

- 9 The LDP should contain a policy which seeks to protect existing B class employment facilities unless there are clear reasons to justify any such loss.
- 10 The LDP should adopt a positive approach in respect of home working and (where appropriate) the development of live/work units.
- 11 BBNPA should update the LDP Waste Issues Paper upon confirmation from Powys County Council regarding the waste need and proposed locations for any specific new waste facilities.
- 12 Employment (B use class and non B use class) development should be monitored and reviewed regularly to identify trends and to inform any subsequent review of the LDP;
- 13 The importance of non-B class sectors should be recognised in the LDP and encouraged through LDP policies, where they would add to the strength, viability and sustainability of the economy;
- 14 Further investigation into the need for non B Class uses should be undertaken to inform relevant policies.
- 15 Agriculture and forestry activities should be promoted as a key economic sector and for their environmental management functions.
- 16 The LDP should encourage farm diversification, but particularly those types which are interconnected with the practice of agriculture and add value to farming activities.
- 17 The value of tourism should be enhanced by reducing the seasonality of tourism and by encouraging greater levels of expenditure by visitors. This can be achieved by:
 - i BBNPA should be marketed as an overnight tourist location. Improvements should also be made to the current provision of overnight accommodation within the National Park.
 - ii LDP policies should seek to promote off-peak tourism proposals to help reduce the seasonality of tourism in the National Park.
 - iii The BBNPA should seek to continue to encourage sustainable forms of transport for day tourists and ensure any other potentially negative impacts of tourism are managed and mitigated where necessary.
- 18 The considerable economic benefits that are associated with the quality of the environment and the mutual benefits that exist between sustainable economic development and the promotion of the environment should be highlighted so that it is fully understood by all within the National Park.
- 19 Training, mentoring and business support initiatives should be established and maintained in order to help retain local people and also to sustain the viability of local businesses.

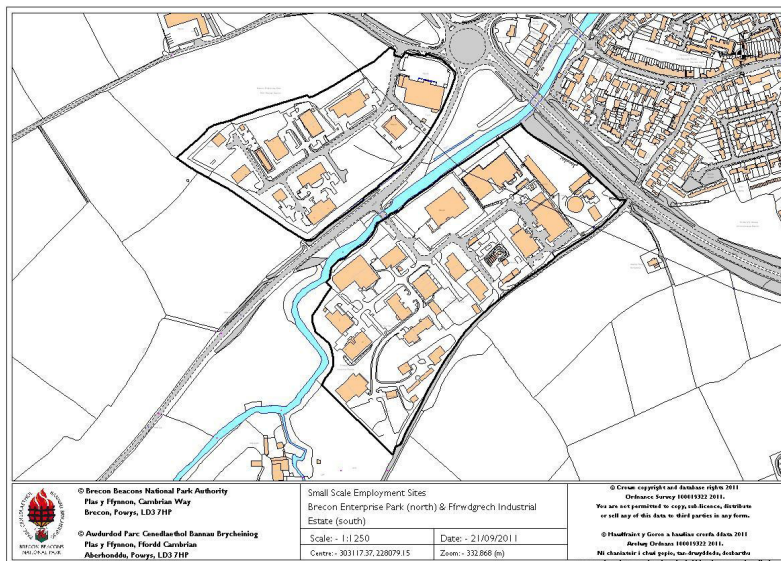
- 20 Consideration should be given to the potential for grants and financial support initiatives to be implemented in order to support local businesses.
- 21 Increased capacity of the broadband communication systems should be sought and encouraged throughout the National Park.

Appendix 1 List of Consultees

Agents	McCartneys, Estate Agents and Surveyors
	Clee Tompkinson Francis, Estate Agents and Surveyors
	Stuart Hogg, Property Consultants
	Montague Harris & Co., Land and Estate Agents
Key Businesses	Exegesis – Spatial Data Management Ltd, GIS Consultancy
	AndersonBrecon (formerly Brecon Pharmaceuticals)
Chamber of Commerce	Brecon Chamber of Trade
	Llandovery & District Chamber of Commerce
Economic Development Departments	Carmarthenshire County Council, Economic Development Department
	Rhondda Cynon Taff CBC, Economic Development Department

Appendix 2 Site Assessment Proformas

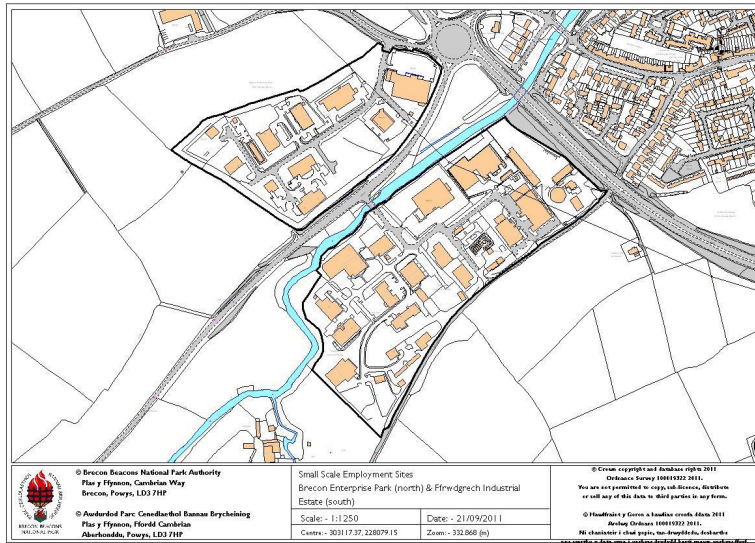
No. 1	Site ID BREC1	Location Brecon Enterprise Park, Warren Road	Nearest Settlement Brecon	Area (ha) 6.6
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Criteria	Comment	Score
Road Access	Site is accessible off a strategic roundabout on the outskirts of Brecon. This roundabout provides links with the A470 and A40.	++
Public Transport Access	The nearest bus stop is located on Newgate Street (B4602) approximately 800m away. No railway station within the vicinity. Bus service is reasonable with service approx every half hour during peak times and journeys taking approx 5 minutes to Brecon town centre.	-
Pedestrian/cycle access	No cycle lane provision in the vicinity of the Site. Some narrow pavements are provided on the roundabout allowing pedestrian access to the Industrial Estate from Brecon town-centre. Pavements are provided within the Industrial Estate itself.	-
Proximity to residential areas and community facilities	Residential properties located beyond the roundabout, on the north-east boundary of the Site (approximately 300m). A pub (Drivers Arms) is located within walking distance (approximately 500m) on Newgate Road.	0
Brown/Greenfield Status	Brownfield, with a vacant greenfield plot providing an expansion opportunity.	+
Adjoining Uses	Site is located within the LDP's defined urban area. Agricultural land immediately to the north and west, although the field to the west has planning permission for a permanent gypsy and traveller site which may act to discourage future occupants of the Industrial Estate.	+
Relationship with Built Environment	Within the allocated LDP urban area, on the edge of the settlement.	++
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints upon development.	++
Would development of site present opportunity to remove eyesore	No	0

Criteria	Comment	Score
Ecology	Mature hedgerow and trees form most of the Site's boundary although no known ecology constraints upon development.	++
TPOs	No TPOs on or adjoining site	++
Topography	Generally flat site with no constraints upon development arising from topography.	++
Contamination	No contamination identified.	++
Flood Risk	No DAM Flood Zone on site although the BBNPA Strategic Flood Risk Assessment (September 2011) identifies small areas, within the site boundary, of 'intermediate' and 'less' susceptible to surface water flooding.	++
Water Quality	Watercourse (River Tarrell) within 100m of the site boundary.	0
Impact on agricultural land	Site not agricultural land	++
Viability	No significant site costs which would undermine development viability. However the presence of a Gypsy and Traveller Site immediately adjacent to the Industrial Estate may adversely affect future market demand.	-
Ownership/site availability	The vacant plot on the Industrial Estate as far we are aware is available for development. The Industrial Estate also has another existing unit which is currently advertised as being available for let.	++
Pressure for other forms of development.	Site is identified as an existing Industrial Estate in the composite LDP. The Site is therefore appropriate for B class uses.	++
Overall Comments	<p>The Industrial Estate is very well located close to a strategic road linkage (A470) however it is not well linked to Brecon centre via public transport, pedestrian linkages or cycling.</p> <p>The Industrial Estate has benefited from recent investment, with the addition of Homebase on the approach into the Estate although the development of a gypsy and traveller site immediately south-west of the Site may adversely effect future market demand on the Industrial Estate.</p>	++

No. 2	Site ID BREC2	Location Ffrwdgrech Industrial Estate	Nearest Settlement Brecon	Area (ha) 12.6
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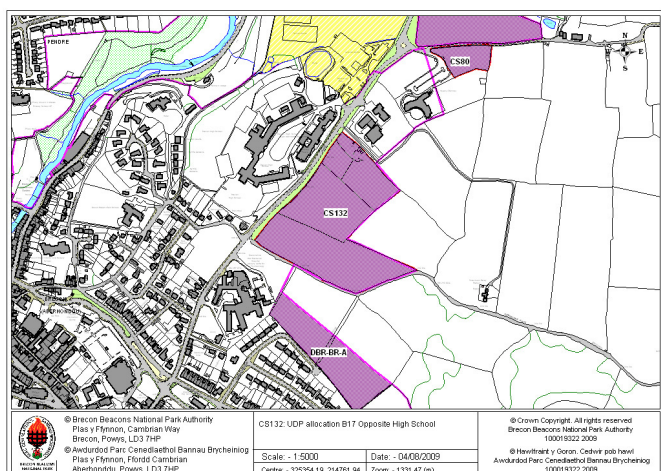


Criteria	Comment	Score
Road Access	Site is accessible directly off the A470 on the outskirts of Brecon. Turning into and out of the Industrial Estate is possible via a separate turning lane.	++
Public Transport Access	The nearest bus stop is located on Newgate Street (B4602) approximately 800m away. No railway station within the vicinity. Bus service is reasonable with service approximately every half hour during peak times and journeys taking approx 5 minutes to Brecon town centre.	-
Pedestrian/cycle access	No cycle lane provision in the vicinity of the Site. Limited pavements are provided within the Industrial Estate itself and no pavements are provided approaching the Industrial Estate from the adjacent roundabout.	-
Proximity to residential areas and community facilities	Residential properties located beyond the A40 on the north-east boundary of the Site (within 100m of the Site boundary although the A40 separates the two uses). A pub (Drovers Arms) is located within walking distance on Newgate Road (approximately 500m).	0
Brown/Greenfield Status	Brownfield.	++
Adjoining Uses	Site is located within the LDP's defined urban area. Agricultural land is located immediately to the south and west of the Site. To the east is the A40 Road, beyond which is a residential area. The Site's northern boundary abuts the River Tarrell which runs alongside the A470.	+
Relationship with Built Environment	Within the allocated LDP urban area, on the edge of the settlement.	++

Criteria	Comment	Score
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site. Part of the Site is allocated as a 'notifiable installation' and proposals affecting Notifiable Sites will not be permitted unless the NPA is satisfied that there is no risk to public health and safety.	++
Landscape Sensitivity	No known landscape constraints upon development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	Mature hedgerow and trees form most of the Site's boundary and the Industrial Estate itself contains extensive areas of landscaping, although there are no known ecology constraints upon development. It is relevant to note that a designated Special Area of Conservation (SAC) and a Site of Special Scientific Interest (SSSI) are located just beyond the northern Site boundary (running along the River Tarrell).	++
TPOs	No TPOs on or adjoining site	++
Topography	Generally flat site with no constraints upon development arising from topography.	++
Contamination	No contamination identified.	++
Flood Risk	No DAM Flood Zone on site although the BBNPA Strategic Flood Risk Assessment (September 2011) identifies small areas, within the site boundary, of 'intermediate' and 'less' susceptible to surface water flooding. The River Tarrell runs immediately beyond the northern site boundary and is identified as EA Flood Zone C2.	++
Water Quality	River Tarrell is located immediately beyond the northern boundary of the Site.	-
Impact on agricultural land	Site not agricultural land	++
Viability	No significant site costs which would undermine development viability. However the presence of a Gypsy and Traveller Site to the north of the Site (separated by the A470) may adversely affect future market demand.	-
Ownership/site availability	The Industrial Estate contains a number of vacant units which are currently advertised as being available for immediate let.	++
Pressure for other forms of development.	Site is identified as an existing Industrial Estate in the composite LDP. The Site is therefore appropriate for B class uses.	++

Criteria	Comment	Score
Overall Comments	<p>This Industrial Estate is one of the largest in the Brecon Beacons National Park and contains a range of occupiers from Hay and Brecon Farmers to BVG Airflow.</p> <p>The Industrial Estate is located very well located in relation to a strategic road linkage (A470), however it is not well linked to Brecon centre via public transport, pedestrian linkages or cycling. Nevertheless, the Site is reasonably well presented and occupies an important employment location for the BBNPA.</p> <p>Although the development of a gypsy and traveller site immediately north-west of the Site (beyond the A470) may adversely effect future market demand on the Industrial Estate.</p>	++

No. 3	Site ID BREC3	Location UDP Allocation B17 Opp. High School, North of Hospital	Nearest Settlement Brecon	Area (ha) 5
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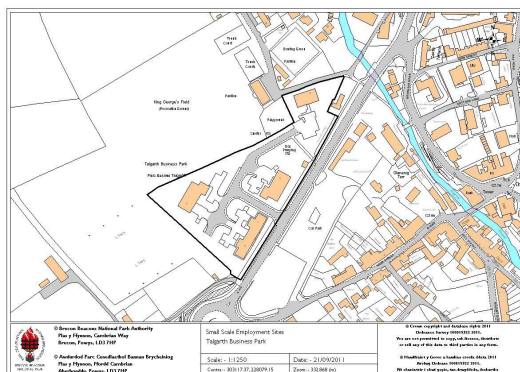


Criteria	Comment	Score
Road Access	A gateway access into the Site is currently available directly off Cerrigcochion Road (B4602) on the eastern edge of Brecon. A safe and suitable access could be provided without substantial cost. The road is not congested but on a gradient.	+
Public Transport Access	The nearest bus stop is located on Cerrigcochion Road (B4602) from Coleg Powys, approximately 150m away. A bus interchange is located round 400m away, off Heol Gouesnou. No railway station within the vicinity. Bus services from the nearest bus stop (at Coleg Powys) run approximately hourly to Brecon Interchange, Hereford and less frequently Hay. Bus services from the Interchange are frequent (every few minutes at peak times and at least every half an hour off-peak) and provide links to larger settlements such as Cardiff, Swansea, Abergavenny and Hereford.	+
Pedestrian/cycle access	National Cycle Route 8 (Glasbury (Bridge) to Nangarw) is located on the B4602 road. The cycle route is on the road and is not delineated by road markings. Pavements are provided alongside one-side of the B4602 although this road is sloping. A bridleway/footpath is located alongside the southern boundary of the Site. Bethel Square is located approximately 600m away.	0
Proximity to residential areas and community facilities	Residential properties are located beyond the B4602 to the south-west of the Site. Coleg Powys is located to the north-east, north-west and west of the Site.	+

Criteria	Comment	Score
	Community facilities such as a supermarket and shops are located approximately 400-500m away.	
Brown/Greenfield Status	Greenfield.	--
Adjoining Uses	<p>Site is located on the edge of the existing urban area.</p> <p>Brecon Hospital is located to the south-west of the Site, although a thick woodland area separates the Site from this use.</p> <p>Agricultural land is located to the south and east.</p> <p>Coleg Powys is located to the north of the Site, beyond which Ysgol Y Banner (Primary School).</p> <p>The western boundary of the Site is formed by the B4602, beyond which is Brecon High School and Coleg Powys.</p>	0
Relationship with Built Environment	Within the allocated LDP urban area on the eastern edge of the settlement.	++
Proximity to Infrastructure	Water, electricity, and telecommunications all connected to site. A public water main is located on-site and requires an easement. Sewerage network improvements are also noted as being necessary to enable development.	++
Landscape Sensitivity	No known landscape constraints upon development although site is located in Middle Usk valley registered Historic Landscape.	+
Would development of site present opportunity to remove eyesore	No although the field offers some amenity value on the approach into Brecon centre.	-
Ecology	<p>The Site is greenfield and includes some hedgerows and mature trees. It is likely that ecology issues will need to be addressed prior to development but this need not constrain the Site. The BBNPA ecologist notes the likelihood of bat flight lines across the site.</p> <p>The River Honddu is located approximately 400m west of the Site.</p>	0
TPOs	No TPOs on or adjoining site	++
Topography	Part of the Site is sloping and this will have some implications upon the development. The development's layout and design will need to take account of this.	0
Contamination	No contamination identified	++
Flood Risk	No DAM Flood Zone on site although the BBNPA Strategic Flood Risk Assessment (September 2011) identifies a small area along the western edge (on Cerrigcochion Road) of the Site as being 'less' susceptible to surface water flooding. A greenfield run-off restriction is in place for any proposed development (composite LDP).	+
Water Quality	River Honddu is located approximately 400m west of the Site.	+
Impact on agricultural land	Site is not Grade 1, 2 or 3a agricultural land.	0
Viability	No significant site costs or limited market demand which would undermine viability.	0

Criteria	Comment	Score
Ownership/site availability	Site ownership known for the northern parcel of the Site and this is available for development. Latest comments from DCWW indicate that “there are no fundamental issues why this site cannot be delivered”.	++
Pressure for other forms of development.	Site is allocated as a mixed-use (employment and residential) Site in the composite LDP. The Site is therefore appropriate for B class uses.	++
Overall Comments	<p>A greenfield site, allocated for mixed-use development on the eastern edge of Brecon, close to public transport linkages, the centre and a good quality B-road access.</p> <p>Adjoining uses require a sensitive design approach, although overall the Site represents a good quality development opportunity for B1 employment use. Due to the Site’s proximity to sensitive residential and school uses the Site is not considered to be appropriate for B2 uses.</p>	+

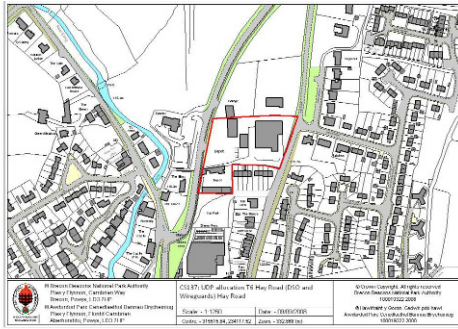
No. 4	Site ID TAL1	Location Talgarth Business Park	Nearest Settlement Talgarth	Area (ha) 1.6
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Criteria	Comment	Score
Road Access	Site is accessible directly off the A479 on the western edge of Talgarth. The road is not congested although is straight and therefore relatively fast-moving.	++
Public Transport Access	The nearest bus stop is located on Talgarth Square approximately 450 m away. No railway station within the vicinity. Bus service is approximately hourly and journeys taking around 20 minutes to Brecon town centre.	-
Pedestrian/cycle access	National Cycle Route 8 (Glasbury (Bridge) to Nangarw) is located alongside the Site's entrance (on the A479). The cycle lane is a traffic-free path on pavement. Pavements are provided within the Industrial Estate itself and alongside the A479.	++
Proximity to residential areas and community facilities	Residential properties are located beyond on the eastern boundary of the Site. Talgarth Square is located around 400m away from the Site and this provides a range of community facilities including pubs, shop and cafes.	+
Brown/Greenfield Status	Brownfield site, with a vacant unit currently being advertised.	++
Adjoining Uses	Playing fields are located beyond the northern and southern boundaries. To the south is the A479, beyond which is a public car park. To the east are some residential dwellings, separated from the Industrial Estate by the A479.	+
Relationship with Built Environment	Within the allocated LDP urban area, on the western edge of the settlement. The development relates well with the existing urban form.	++
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	A thick hedgerow borders the Industrial Estate from neighbouring uses and extensive areas of landscaping are located within the Industrial Estate itself. There are no known ecological issues however.	++

Criteria	Comment	Score
TPOs	10 horse-chestnut trees located along the northeast Site boundary, southwest of Brookside College.	0
Topography	Flat site.	++
Contamination	No contamination identified.	++
Flood Risk	No DAM Flood Zone on site although the BBNPA Strategic Flood Risk Assessment (September 2011) identifies small areas, within the site boundary, of 'intermediate' and 'less' susceptible to surface water flooding.	++
Water Quality	The River Llynfi is located approximately 300m west of the Site boundary.	+
Impact on agricultural land	Site not agricultural land	++
Viability	No significant site costs or limited market demand which would undermine viability.	+
Ownership/site availability	A vacant unit is currently being advertised for letting.	++
Pressure for other forms of development.	Site is identified as an existing Industrial Estate in the composite LDP.	++
Overall Comments	<p>A small Industrial Estate, accessible off the A479 and located close to the town's central square, which accommodates a variety of shops and services.</p> <p>The units are relatively small but are built to a high specification.</p>	++

No. 5	Site ID TAL2	Location UDP allocation T6/10 Hay Road (DSO & Wireguards)	Nearest Settlement Talgarth	Area (ha) 0.9
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Criteria	Comment	Score
Road Access	Site is accessible directly off the A4078 on the northern edge of Talgarth. The road is not congested and is within the town's 30 mph speed limit.	++
Public Transport Access	The nearest bus stop is located on Talgarth Square approximately 450m away. No railway station within the vicinity. Bus service is approx. hourly and journeys taking around 20 minutes to Brecon town centre.	-
Pedestrian/cycle access	National Cycle Route 8 (Glasbury (Bridge) to Nangarw) is located alongside the A4078. The cycle lane is a traffic-free path but is shared with pedestrians. No pavements are provided within the Site itself however.	++
Proximity to residential areas and community facilities	Residential properties are located beyond part of the southern boundary of the Site. An agricultural market is also located to the south of the Site. To the north is an MOT centre and a joinery. To the west, beyond the A4078, is a Doctors Surgery and some residential units. To the west, beyond Hay Road are residential uses. A Pub (The Castle Hotel) is located around 150m away. Talgarth Square is located around 450m away from the Site and this provides a range of community facilities including pubs, shop and cafes.	+
Brown/Greenfield Status	Brownfield site.	++
Adjoining Uses	The Site is located within the existing urban area and includes a mix of adjoining uses. Some residential uses are located beyond part of the southern boundary of the Site although a careful design approach could help to ensure the development will not be adversely affected.	+
Relationship with Built Environment	Within the allocated LDP urban area, on the northern edge of the settlement. The development relates reasonably well to the existing urban form. The Site forms a prominent entrance feature approaching Talgarth via the A4078.	++
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site, although constraints on the public sewerage network and waste water treatment works in the area are noted.	+
Landscape Sensitivity	No known landscape constraints on development although the Site forms a prominent roadside entrance feature on approach into Talgarth via the A4078. The site also lies within the Middle Usk Valley Registered Historic Landscape and the impacts of development may require assessment.	+
Would	Yes – the site contains a number of derelict buildings, on a relatively	+

Criteria	Comment	Score
development of site present opportunity to remove eyesore	prominent location, on the approach into Talgarth. Development of the Site would therefore remove a current eye sore.	
Ecology	No known ecology constraints upon development. Derelict areas of the Site have partly re-vegetated, some hedgerows are located along the north and eastern boundaries of the Site. A watercourse is located to the west of the Site, within 50m of the Site boundary.	++
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site.	++
Contamination	Due to the site's previous use. The site maybe subject to potential contamination.	0
Flood Risk	No DAM Flood Zone on site although the BBNPA Strategic Flood Risk Assessment (September 2011) identifies some areas, within the site boundary, of 'more', 'intermediate' and 'less' susceptible to surface water flooding. However, the composite LDP highlights the need for development not to increase runoff and exacerbate flooding. An EA Flood Zone C2 is located immediately beyond the western site boundary however.	+
Water Quality	Ditches and a watercourse are located within 50m of the Site.	0
Impact on agricultural land	Site not agricultural land	++
Viability	The Site is previously developed land, which contains a number of derelict buildings. Redevelopment of the Site may require significant site costs and there is likely to be limited market demand in this area for this site, especially when there are employment vacancies in near-by existing Industrial Estates such as Talgarth Business Park. Both factors relating to market demand and site costs could undermine the viability of development.	-
Ownership/site availability	The Site is mostly derelict and therefore would require redevelopment prior to occupation of the Site. The latest DCWW states that "there are no fundamental issues why this site cannot be delivered once the improvements to Talgarth WwTW have been completed".	+
Pressure for other forms of development.	Site is allocated for mixed-use (employment and residential) development in the composite LDP.	++
Overall Comments	Unattractive, partially derelict Site on roadside entrance into Talgarth. Part of the Site is appears to be used as a bus depot and grit/salt storage area. Future occupation of the Site would require redevelopment although the site costs of this compared with the market demand for this type of Site in this area could yield some viability concerns. Site is likely to be appropriate for B1 uses and some forms of B2 or B8 uses, subject to consideration of visual impact and residential amenity.	0

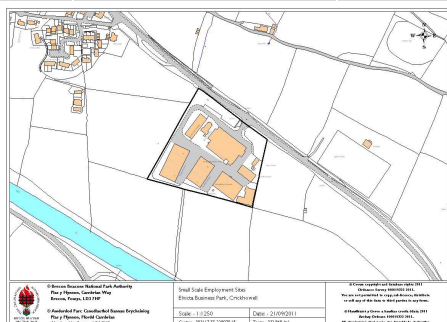
No. 6	Site ID TAL3	Location Former Mid Wales Hospital Site, (UDP allocation).	Nearest Settlement Talgarth	Area (ha) 4.5
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Criteria	Comment	Score
Road Access	The Site has two access points however the main access road is via Bell Street and Hospital Road – an unclassified road. This access is narrow, unsuitable for Heavy Goods Vehicles (HGVs) and buses due to a number of ‘pinch’ points - notably a narrow hump-back bridge.	--
Public Transport Access	The nearest bus stop is located on Talgarth Square approximately 850m away down a relatively steep road. No railway station within the vicinity. Bus service is approx. hourly and journeys taking around 20 minutes to Brecon town centre.	-
Pedestrian/cycle access	National Cycle Route 8 (Glasbury (Bridge) to Nangarw) is located approximately 850m away, on alongside the A4078. The cycle lane is a traffic-free path on pavement. Pavements are provided within the Mid Wales Hospital Site itself and alongside most of the access road via Bell Street and Hospital Road.	0
Proximity to residential areas and community facilities	The Site is isolated from the main part of the town and is mostly surrounded by agricultural land. However some existing residential properties are located alongside Hospital Road, immediately beyond the western boundary of the Site. A residential use and farm is also located to the east of the Site. The nearest community facility (The Strand Café) is located around 750m away. The majority of the town’s facilities are concentrated around The Square area which is around 850m away from the Site.	-
Brown/Greenfield Status	Brownfield but with large expanses of greenspace.	+
Adjoining Uses	The Site is isolated from the main part of the town and is mostly surrounded by agricultural land. However some existing residential properties are located alongside Hospital Road, immediately beyond the western boundary of the Site. A residential use and farm is also located to the east of the Site.	0
Relationship with Built Environment	Not allocated within the LDP urban area and therefore Site is defined as being in the open countryside. The Site is also more than 100m from the defined LDP settlement boundary. However the Site is located within the Talgarth Conservation Area.	--
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++

Criteria	Comment	Score
Landscape Sensitivity	No known landscape constraints on development although long-ranging views can be glimpsed of the Site therefore visual impact will need to be considered as part of any potential redevelopment of the Site.	+
Would development of site present opportunity to remove eyesore	The Site is currently derelict and the site's re-use would in effect remove an eyesore.	+
Ecology	Ecology work has been completed as part of the current planning applications on the Site and has confirmed the presence of bats on the Site. Pwll-yr-Wrach Site of Special Scientific Interest (SSSI) is located 200m from the Site.	0
TPOs	Some Tree Preservation Orders (TPOs) are present on site	-
Topography	Flat site.	++
Contamination	Some sources of contamination e.g. asbestos and oil tanks identified on the Site.	0
Flood Risk	No DAM Flood Zone on site.	++
Water Quality	The River Ennig is located within approximately 50m of the Site boundary.	0
Impact on agricultural land	Site not agricultural land	++
Viability	Significant site costs are likely to present a viability challenge.	-
Ownership/site availability	Ownership is known and planning permission is actively being sought as a mixed-use development by Collins Developments (Pontrilas) Ltd.	++
Pressure for other forms of development.	The Site is currently subject to mixed-use planning application (LPA Refs 12/07922/FUL, 12/07690/CAC and 12/07795/FUL). These applications are seeking planning permission for housing, employment and community uses. The Site is not allocated in the emerging LDP however.	-
Overall Comments	A previously developed site situated in an isolated location away from community facilities and public transport linkages. Vehicular access to the Site is narrow and the Site itself has a number of development constraints e.g. bats, TPOs and contamination, which together represent potential viability challenges for any future use of the Site. The Site could be suitable for some forms of B1, B2 and B8 uses, dependant on considerations relating to highways and residential amenity.	-

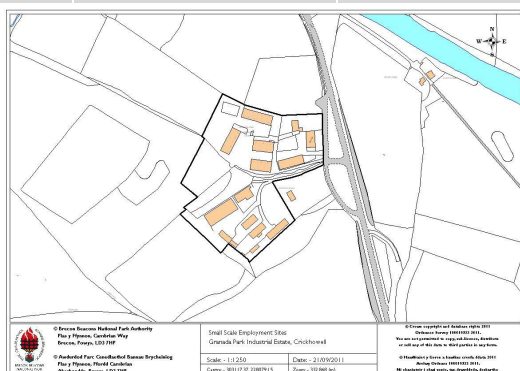
No. 7	Site ID CRICK1	Location Elvicta Business Park	Nearest Settlement Crickhowell	Area (ha) 2.6
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Criteria	Comments	Score
Road Access	Site is accessible directly off the A40, 650m away from the Crickhowell town centre. The road is not congested but is fast-moving – 60mph speed limit.	++
Public Transport Access	The nearest bus stop is located directly outside the entrance into the Industrial Estate, on the A40. This provides an hourly bus service to Brecon and Abergavenny. The nearest railway station is located at Abergavenny, approximately 10km away.	0
Pedestrian/cycle access	The nearest cycle route is located in Llangattock (approx. 2.6km away); this is National Cycle Route 49, which is located alongside the Brecon and Monmouthshire Canal path. Pavements are provided on one side of the A40 providing a link to this Industrial Estate from Crickhowell. A pavement link continues along the side of the A40, providing a pedestrian link between Crickhowell and Glangrwyney. Pavements are not provided within the Industrial Estate itself. Crickhowell Square is located approximately 700m away.	0
Proximity to residential areas and community facilities	Residential properties are located 300m away from the Site and community facilities such as public houses and shops are centred on The Square area, which is located around 700m away.	-
Brown/Greenfield Status	Brownfield site.	++
Adjoining Uses	The Site is located outside the Crickhowell settlement boundary and is divided from the settlement by agricultural land. Agricultural land is located beyond the east, south and west site boundaries. The northern boundary of the site is formed by the A40, beyond which is more agricultural land.	--
Relationship with Built Environment	Outside the allocated LDP settlement boundary, set within open countryside away from settlement.	--
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site. Part of the Site is designated as a 'notifiable installation' and proposals affecting Notifiable Sites will not be permitted unless the NPA is satisfied that there is no risk to public health and safety.	++
Landscape Sensitivity	No known landscape constraints upon development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Usk is located approximately 150m south-west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific	++

Criteria	Comments	Score
	Interest (SSSI). The site is brownfield and includes some mature trees. There are no known ecological issues on the Site however.	
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site – represents no constraint upon development.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) does not encompass the Site; however the Development Advice Maps (DAMs) identify the Site as being within Flood Zone C2.	--
Water Quality	The River Usk is located approximately 150m south-west of the Site.	+
Impact on agricultural land	Not agricultural land, no impact.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Site ownership is unknown although no vacant units were advertised as being immediately available.	0
Pressure for other forms of development.	Site is identified as an existing employment Site in the composite LDP.	++
Overall Comments	An existing Industrial Estate physically separated from the settlement of Crickhowell. It benefits from a good vehicular access, direct onto an A-road and is well-maintained but it is located within a flood zone.	0

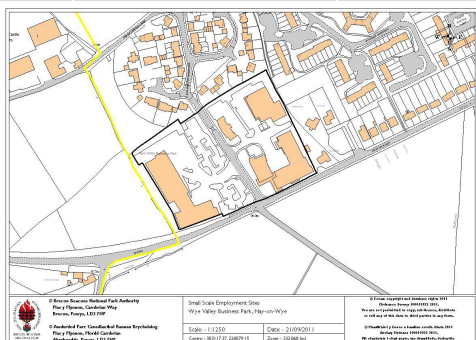
No. 8	Site ID CRICK2	Location Granada Park Industrial Estate	Nearest Settlement Crickhowell	Area (ha) 2.7
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Criteria	Comment	Score
Road Access	Site is accessible directly off the A4077 (Crickhowell Road), 1.5km away from the Crickhowell centre. The road runs alongside the River Usk. It is not congested but is relatively fast-moving – 60mph speed limit. The Industrial Estate is set back from the road by a landscaped area.	++
Public Transport Access	The nearest bus stop is located at Crickhowell Square, approximately 1.5km away. This provides an hourly bus service to Brecon and Abergavenny. The nearest railway station is located at Abergavenny, approximately 11.5km away.	--
Pedestrian/cycle access	The nearest cycle route is located in Llangattock (approx. 2km away); this is National Cycle Route 49, which is located alongside the Brecon and Monmouthshire Canal path. A narrow pavement is provided on one side of the A4077 providing a pedestrian link from Crickhowell/Llangattock. Crickhowell Square is located approximately 1.5km away.	-
Proximity to residential areas and community facilities	Residential properties are located 500m away from the Site. The nearest community facility is a public house (The Vine Tree Inn) located approximately 830m away. Other community facilities such as a shop are centred on The Square area within Crickhowell, which is located around 1.5km away.	-
Brown/Greenfield Status	Brownfield site.	++
Adjoining Uses	The Site is located outside the Crickhowell or Legar settlement boundaries and is divided from these settlements by agricultural land. The Site is therefore defined as being within the open countryside. Agricultural land is located beyond the east, south and west site boundaries. The northern boundary of the site is formed by the A4077 (Crickhowell Road), beyond which is more agricultural land.	--
Relationship with Built Environment	More than 100m outside of the allocated LDP settlement boundary therefore the Site is read as being in the open countryside away from the settlement.	--
Proximity to	Water, electricity and telecommunications all connected to site.	++

Criteria	Comment	Score
Infrastructure		
Landscape Sensitivity	No known landscape constraints upon development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Usk is located approximately 200m north of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is brownfield although it contains some mature trees and hedgerows on its boundaries. There are no known ecological issues on the Site however.	++
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) does not encompass the Site; however the Development Advice Maps (DAMs) identify the Site as being partly designated within Flood Zone C2.	--
Water Quality	River Usk is located approximately 200m north of the Site.	+
Impact on agricultural land	No impact – not agricultural land.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Site ownership is unknown. Three vacancies were noted to exist and therefore are assumed to be available for immediate occupation.	+
Pressure for other forms of development.	Site is identified as an existing employment Site in the composite LDP although is allocated as countryside in the LDP. No known pressures from other forms of development.	++
Overall Comments	A functional Industrial Estate situated within an isolated location, beyond the settlements of Crickhowell and Legar. The Site is not readily accessible via public transport and is located partly in Flood Zone C2. The presence of a joiner's workshop (Timbercraft) on the Site on the Site creates some noise, which may discourage some future potential occupants.	0

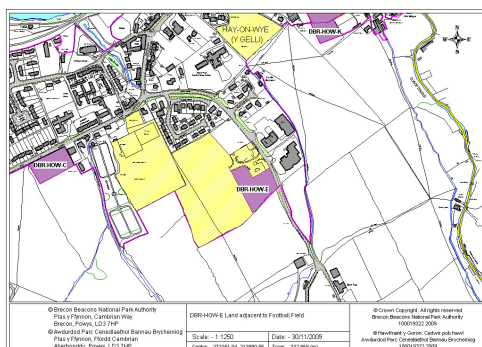
No. 9	Site ID HAY1	Location Wye Valley Business Park	Nearest Settlement Hay-on-Wye	Area (ha) 2.4
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Criteria	Comment	Score
Road Access	<p>Prominent Site on the main access road (B4350) into Hay-on-Wye, when entering the town from a westerly direction.</p> <p>The Business Park is accessed directly off the B4350, with no provision for priority turning. This road is not congested and is located within the 30mph speed limit area, on the approach into Hay-on-Wye.</p>	++
Public Transport Access	<p>The nearest bus stop is located outside Hay-on-Wye Fire Station, which is approximately 400m away. This provides a bi-hourly service to Hereford and Brecon, this bus also provides a link into the centre of Hay-on-Wye.</p> <p>The nearest railway station is located at Hereford, approximately 33km away.</p>	-
Pedestrian/cycle access	<p>The nearest cycle route is located within 200m of the Site. This is National Cycle Route 42 (Lon Las Cymru South), which provides (on-road) links to neighbouring villages such as Llanigon.</p> <p>A pavement is provided on one side of the B4350 providing a pedestrian link into Hay-on-Wye centre, which is located approximately 1km away. Networks of pavements are located within the Industrial Estate itself.</p>	0
Proximity to residential areas and community facilities	<p>Residential properties are located immediately beyond the north and east site boundaries, whilst the nearest community facility (The Swan Public House) is located approximately 700m away. The centre of Hay-on-Wye is approximately 1km away which provides a range of shops and community facilities.</p>	-
Brown/Greenfield Status	<p>Brownfield.</p>	++
Adjoining Uses	<p>The Site is located on the edge of Hay-on-Wye settlement boundary and is bordered by agricultural land on its western edge.</p> <p>Residential properties are located immediately beyond the north and east site boundaries. The Southern site boundary is formed by the B4350, beyond which is agricultural land.</p>	+
Relationship with Built Environment	<p>Inside the allocated LDP settlement boundary and the development relates reasonably well to the existing urban form – creating a gateway development into Hay-on-Wye.</p>	++
Proximity to Infrastructure	<p>Water, electricity and telecommunications all connected to site.</p>	++

Criteria	Comment	Score
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Wye is located approximately 500m north-east of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is brownfield but accommodates some landscaped areas which include trees and hedgerows. There are no known ecological issues on the Site however	++
Topography	Flat site.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identifies the Site as includes some areas which are defined as 'low' or 'intermediate' areas susceptible to surface water flooding.	++
Water Quality	River Wye is located approximately 500m north-east of the Site. No watercourses or ditches apparent on the Site however.	+
Impact on agricultural land	Site not agricultural land	++
Viability	No significant site costs or limited market demand which would undermine viability.	+
Ownership/site availability	Brecon Pharmaceuticals currently occupy the entire Site and no vacancies are noted on the Site.	++
Pressure for other forms of development.	Site is identified as an existing employment Site in the composite LDP although it allocated as white land within the LDP. There are no other pressures for alternative forms of development on the Site.	++
Overall Comments	Very well kept high quality Site which is situated within a visually prominent location, on the roadside approach into Hay-on-Wye. The Site is occupied entirely by Brecon Pharmaceuticals and contains no vacant units within the Site.	++

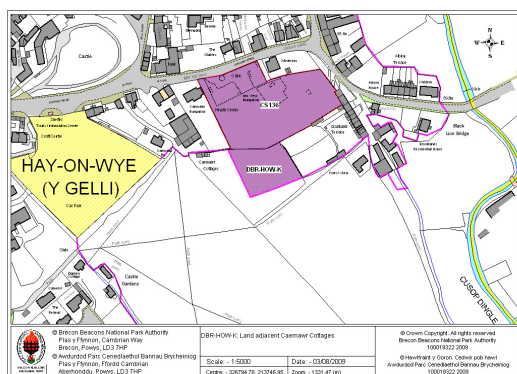
No. 10	Site ID HAY2	Location Land adjacent to Football Field (DBR-HOW-E)	Nearest Settlement Hay-on-Wye	Area (ha) 0.6
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Criteria	Comment	Score
Road Access	<p>The Site is accessible off Forest Road. This is an unclassified road which is located off the B4350 - one of the main access roads into Hay-on-Wye.</p> <p>This road is not congested, although is not suitable for heavy volumes of traffic as it runs through some residential areas. The Site is located within the 30mph speed limit area.</p>	+
Public Transport Access	<p>The nearest bus stop is located outside Hay-on-Wye Fire Station, which is approximately 600m away. This provides a bi-hourly service to Hereford and Brecon, this bus also provides a link into the centre of Hay-on-Wye.</p> <p>The nearest railway station is located at Hereford, approximately 33km away.</p>	-
Pedestrian/cycle access	<p>National Cycle Route 42 (Lon Las Cymru South) is located immediately adjacent to the Site. This route provides an on-road cycle link to neighbouring villages as well as common land areas and mountains such as Hay Bluff.</p> <p>A pavement is provided on one side of the access road providing a pedestrian link into Hay-on-Wye centre, which is located approximately 800m away.</p> <p>Due to the greenfield nature of the Site, no existing pavements or cycle access is provided on the Site.</p>	0
Proximity to residential areas and community facilities	<p>A medical centre is located on the northern boundary of the Site, beyond which are a row of newly constructed residential properties.</p> <p>The nearest community facility (The Swan Public House) is located approximately 500m away. The centre of Hay-on-Wye is approximately 800m away which provides a range of shops and community facilities.</p>	+
Brown/Greenfield Status	Greenfield site.	--
Adjoining Uses	The Site is located on the edge of Hay-on-Wye settlement boundary and is bordered by playing fields/football pitch to the west, agricultural land to the south, a medical centre and residential properties to the north and Greenfield Industrial Estate to the east (which accommodates a range of uses e.g. TS Henderson which deals in garage repairs).	+

Criteria	Comment	Score
	The proximity of Greenfield Industrial Estate may result in clustering benefits however future development will need to carefully consider the Site's relationship with the near-by residential and medical centre uses.	
Relationship with Built Environment	Inside the allocated LDP settlement boundary.	0
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site located adjacent to site	+
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Wye is located approximately 600m north-west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is greenfield (agricultural land) and is bordered by some trees and hedgerows. There are no known ecological issues on the Site however due to the greenfield nature of the Site, ecology may need to form a consideration.	+
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identifies the Site as includes some areas which are defined as 'low' or 'intermediate' areas susceptible to surface water flooding.	++
Water Quality	River Wye is located approximately 600m north-west of the Site. No ditches or watercourses are apparent on the Site.	++
Impact on agricultural land	The site is greenfield and is agricultural land – although is not classified as a Grade 1, 2 or 3a.	0
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Ownership is currently unknown; Site will require access across the adjacent medical centre car park which may potentially create a ransom strip issue.	-
Pressure for other forms of development.	Subject to member resolution, this Site is allocated for employment development.	++
Overall Comments	Greenfield site, located on the western edge of Hay-on-Wye, close to a good quality B-road. The Site is likely to be appropriate for B1 use classes, The Site's proximity to residential and other sensitive uses is noted and future development will need to take into consideration any potential for bad neighbour uses.	+

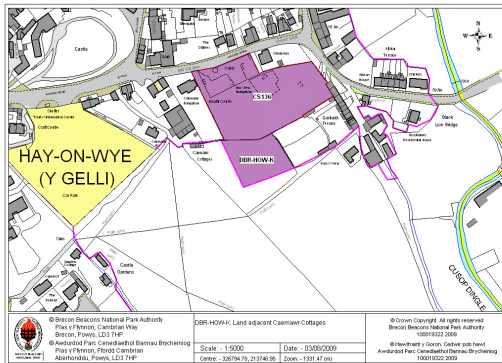
No. 11	Site ID HAY3	Location UDP allocation H6 Former Health Centre (CS136)	Nearest Settlement Hay-on-Wye	Area (ha) 0.73
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Criteria	Comment	Score
Road Access	<p>The Site is accessible off the B4348 - one of the main roads running through Hay-on-Wye.</p> <p>This road is reasonably narrow and can be susceptible to congestion at peak times, due to its location close to the centre of Hay-on-Wye and the presence of a cash-point which results in some cars stopping temporarily on yellow-lines. The road is subject to a 30mph speed limit area. A secondary access is also available from the eastern frontage of the site but is constrained due to inability to achieve adequate visibility (see composite LDP).</p>	+
Public Transport Access	<p>The nearest bus stop is located on the B4348, which is approximately 100m away. This provides a bi-hourly service to Hereford and Brecon.</p> <p>The nearest railway station is located at Hereford, approximately 33km away.</p>	0
Pedestrian/cycle access	<p>National Cycle Route 42 (Lon Las Cymru South) is located approximately 400m away from the Site. This route provides an on-road cycle link to neighbouring villages as well as common land areas and mountains such as Hay Bluff.</p> <p>Pavements are provided on one side of the B4348 road providing a pedestrian link around Hay-on-Wye centre. Some pavements are currently located within the Site although this is associated with the current use of the Site as a dental centre.</p>	0
Proximity to residential areas and community facilities	Residential uses are located to the north (separated by the B-road), east and west. The Site is located within the centre of Hay-on-Wye and a range of shops and community facilities are located within a few minutes walk of the Site (approximately 170m).	++
Brown/Greenfield Status	Partly brownfield (dental centre and youth & community centre) and partly greenfield.	+
Adjoining Uses	The Site is located within the centre of Hay-on-Wye. Residential uses are located to the east, west and north of the Site. An area of agricultural land and garden space is located beyond the southern boundary of the Site. Depending on the nature of the potential B uses on the Site, this may adversely affect neighbouring residential uses.	-
Relationship with	Inside the allocated LDP settlement boundary, within the centre of Hay-	++

Built Environment	on-Wye.	
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site. Waste water treatment works serving the area is recognised to have limited capacity (see composite LDP).	+
Landscape Sensitivity	No known landscape constraints on development, although the site lies on the edge of the historic core of the settlement and is therefore likely to require appropriate archaeological investigation.	+
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Wye is located approximately 500m west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is mostly brownfield but includes some greenfield. The greenfield area of the Site appears to be currently used as an informal recreational area and is bordered by trees/hedgerows. There are no known ecological issues on the Site however.	++
TPOs	No TPOs on or adjoining site.	++
Topography	Slightly sloping site, although topography should not represent a key constraining factor.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identifies the Site as includes some areas which are defined as 'low' or 'intermediate' areas susceptible to surface water flooding.	++
Water Quality	River Wye is located approximately 500m west of the Site. The Dulas Brook (a tributary of the River Wye) is also located approximately 200m away at Cusop Dingle. No watercourses or ditches are apparent on the Site.	+
Impact on agricultural land	The site is partly greenfield. This area appears to be currently used as an informal recreation area as some bicycle jumps have been constructed. The land therefore appears to not be utilised for agriculture and therefore its development will not result in an adverse impact upon agriculture.	++
Viability	Redevelopment of the Site will necessitate significant cost due to the presence of on-site buildings. This is likely to impact upon viability of development if the Site were developed for employment use only.	0
Ownership/site availability	Ownership is known but the dental centre and community centre are still operational and therefore are not likely to become available until a later stage.	0
Pressure for other forms of development.	Subject to member resolution, this Site is proposed to be allocated for residential development.	-
Overall Comments	The development site is mostly brownfield, but contains an element of greenfield. It is located within the centre of Hay-on-Wye and is therefore accessible to a range of facilities and services. However the Site is currently used as a dental surgery and community centre therefore the relocation of these uses is likely to mean the Site is not available for development until a later date. The Site's location close to existing residential properties is likely to render the Site inappropriate for B2 or B8 use classes.	+

No. 12	Site ID HAY4	Location Land Adj. Caemawr Cottages (DBR-HOW-K)	Nearest Settlement Hay-on-Wye	Area (ha) 0.2
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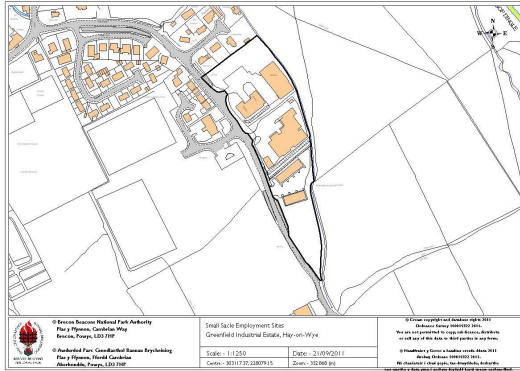


Criteria	Comment	Score
Road Access	<p>The Site enjoys no direct vehicular access at present and the Site's rather isolated location with agricultural land to the west and south, garden space to the east and the mixed use allocation (CS136) to the north, means the Site will only be accessible when the neighbouring mixed-use allocation is developed.</p> <p>This adjacent mixed-use allocation is located on the B4348 - one of the main roads running through Hay-on-Wye.</p> <p>This road is reasonably narrow and can be susceptible to congestion at peak times, due to its location close to the centre of Hay-on-Wye and the presence of a cash-point which results in some cars stopping temporarily on yellow-lines. The road is subject to a 30mph speed limit area. The adjacent site also has a constrained access on its eastern frontage.</p>	-
Public Transport Access	<p>The nearest bus stop is located on the B4348, which is approximately 200m away. This provides a bi-hourly service to Hereford and Brecon.</p> <p>The nearest railway station is located at Hereford, approximately 33km away.</p>	0
Pedestrian/cycle access	<p>National Cycle Route 42 (Lon Las Cymru South) is located approximately 450m away from the Site. This route provides an on-road cycle link to neighbouring villages as well as common land areas and mountains such as Hay Bluff.</p> <p>Pavements are provided on one side of the B4348 road providing a pedestrian link around Hay-on-Wye centre.</p> <p>Due to the Greenfield nature of the Site no existing cycle of pedestrian access exists on the Site, although there are some footpaths immediately adjacent to the Site.</p>	-
Proximity to residential areas and community facilities	<p>Residential uses are located to the east of the Site – although separated from the Site by garden space. Residential uses are also located some distance to the north-west of the Site, although again this use is separated from the Site by garden space.</p> <p>The Site is located within the centre of Hay-on-Wye and a range of shops</p>	++

Criteria	Comment	Score
	and community facilities are located within a few minutes walk of the Site (approximately 220m).	
Brown/Greenfield Status	Greenfield.	--
Adjoining Uses	<p>The Site is located within the centre of Hay-on-Wye although is somewhat isolated from its neighbouring uses by areas of garden or agricultural land.</p> <p>Residential uses are located to the east of the Site – although separated from the Site by garden space. Residential uses are also located some distance to the north-west of the Site, although again this use is separated from the Site by garden space. Agricultural land is located to the south of the Site. An area of informal recreational space and a health centre is located to the north of the Site – although the health centre and recreational area will need to be developed in tandem or prior to this Site, in order to provide access to this Site.</p>	-
Relationship with Built Environment	Inside the allocated LDP settlement boundary, within the centre of Hay-on-Wye however the site is currently rather isolated from the existing built form and its development would be reliant on the adjacent site (CS136) being developed and presumably providing the Site's access.	+
Proximity to Infrastructure	Water, electricity and telecommunications connected to adjacent site.	+
Landscape Sensitivity	No known landscape constraints on development although the site lies within the Middle Usk Valley Registered Historic Landscape and the impacts of the development may require assessment.	+
Would development of site present opportunity to remove eyesore	No – development of the Site would result in the loss of some amenity value.	-
Ecology	<p>The River Wye is located approximately 500m west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI).</p> <p>The site is greenfield and is bordered by some trees and hedgerows. Due to the Greenfield nature of the Site. There are no known ecological issues on the Site however due to the greenfield nature of the Site, ecology may need to form a consideration.</p>	+
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site.	++
Contamination	No contamination identified,	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identifies the Site as includes some areas which are defined as 'low' or 'intermediate' areas susceptible to surface water flooding.	++
Water Quality	<p>River Wye is located approximately 500m west of the Site. The Dulas Brook (a tributary of the River Wye) is also located approximately 200m away at Cusop Dingle.</p> <p>No watercourses or ditches are apparent on the Site.</p>	+
Impact on agricultural land	The site is Greenfield and is used for agricultural grazing. The Site is not classified as Grade 1, 2 or 3a agricultural land	0

Criteria	Comment	Score
Viability	The Site is quite small in area and is reliant on development of the adjacent mixed-use allocation (CS136) in order to gain access to the Site. There could be potential for a ransom strip situation which may undermine viability.	-
Ownership/site availability	Site ownership known and is in different ownership to CS136 which creates a potential ransom strip situation which may undermine the site's availability.	-
Pressure for other forms of development.	The Site is allocated in the Composite LDP as a mixed-use (employment and xxx) Site. BBNPA to advise	++
Overall Comments	A small, greenfield site which is located centrally within Hay-on-Wye but is reliant on the development of the adjacent site before adequate vehicular access can be gained to this Site. The Site's location close to existing residential properties is likely to render the Site inappropriate for B2 or B8 use classes.	0

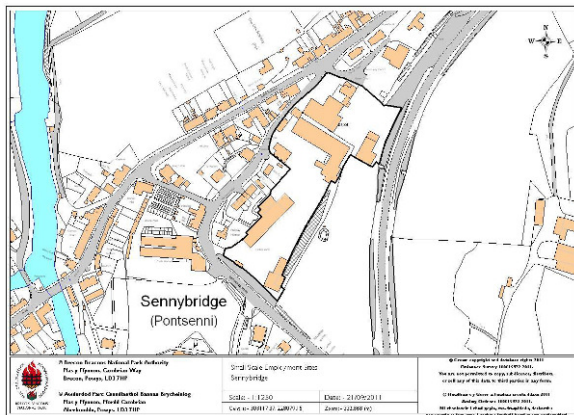
No. 13	Site ID HAY5	Location Greenfield Industrial Estate	Nearest Settlement Hay-on-Wye	Area (ha) 0.6
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Criteria	Comment	Score
Road Access	<p>The Site is accessible off Forest Road. This is an unclassified road which is located off the B4350 - one of the main access roads into Hay-on-Wye.</p> <p>This road is not congested, although is not suitable for heavy volumes of traffic as it runs through some residential areas. The Site is located within the 30mph speed limit area.</p>	+
Public Transport Access	<p>The nearest bus stop is located outside Hay-on-Wye Fire Station, which is approximately 600m away. This provides a bi-hourly service to Hereford and Brecon, this bus also provides a link into the centre of Hay-on-Wye.</p> <p>The nearest railway station is located at Hereford, approximately 33km away.</p>	-
Pedestrian/cycle access	<p>National Cycle Route 42 (Lon Las Cymru South) is located immediately adjacent to the Site. This route provides an on-road cycle link to neighbouring villages as well as common land areas and mountains such as Hay Bluff.</p> <p>A pavement is provided on one side of the access road providing a pedestrian link into Hay-on-Wye centre, which is located approximately 800m away.</p> <p>Some pavements are provided within parts of the Industrial Estate. No cycle access is provided to the Site.</p>	0
Proximity to residential areas and community facilities	<p>A medical centre and a row of residential properties are located beyond the access road, to the west of the Site. Further residential properties are also located to the north of the Site boundary.</p> <p>To the east and south is agricultural land.</p> <p>The nearest community facility (The Swan Public House) is located approximately 500m away. The centre of Hay-on-Wye is approximately 800m away which provides a range of shops and community facilities.</p>	+
Brown/Greenfield Status	Brownfield.	++
Adjoining Uses	<p>The Site is located on the edge of Hay-on-Wye settlement boundary and is bordered by agricultural land to the west and south.</p> <p>A medical centre and a row of newly constructed residential properties are</p>	+

Criteria	Comment	Score
	located beyond the access road, to the west of the Site. Further residential properties are also located to the north of the Site boundary. An adjacent Greenfield Site is currently allocated for mixed use (DBR-HOW-E) but subject to Member resolution may be allocated for residential development only, Any future development will need to carefully consider the Site's relationship with these near-by residential and medical centre uses.	
Relationship with Built Environment	Inside the allocated LDP settlement boundary, although on the edge of the settlement.	0
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Wye is located approximately 600m north-west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is brownfield but includes some areas of landscaping and trees/hedgerows border the Site. A particularly thick boundary separates the Industrial Estate from residential uses to the north. There are no known ecological issues on the Site however.	+
TPOs	No TPOs on or adjoining site.	++
Topography	Flat site.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identifies the Site as includes some areas which are defined as 'low' or 'intermediate' areas susceptible to surface water flooding.	++
Water Quality	River Wye is located approximately 600m north-west of the Site. No ditches or watercourses are apparent on the Site.	++
Impact on agricultural land	The site is brownfield and therefore its development would result in some impact upon agricultural land.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	The Site's ownership is unknown and one vacant unit is available.	+
Pressure for other forms of development.	Site is identified as an existing employment Site in the composite LDP.	++
Overall Comments	Reasonably good quality Industrial Estate, located on the western edge of Hay-on-Wye, close to a good quality B-road. The Site's proximity to residential and other sensitive uses is noted although the current uses on-site do not appear to result in any bad neighbour issues.	+

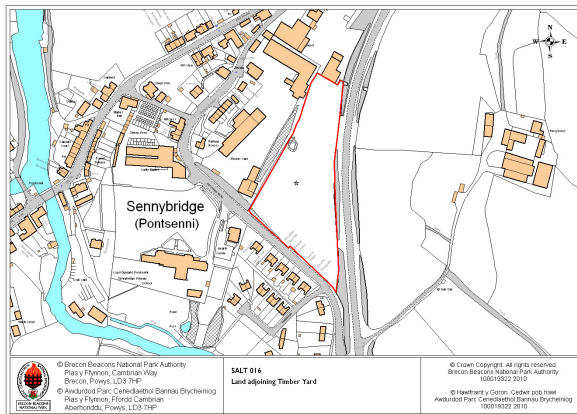
No. 14	Site ID SENNY1	Location Timber Yard	Nearest Settlement Sennybridge.	Area (ha) 1.6
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Criteria	Comment	Score
Road Access	<p>The Site has a number of accesses off the A40 although these are very poor quality due to topography and width.</p> <p>One is steep, narrow road leading from the A40 to the village car park – Hay and Brecon Farmers can be accessed from here.</p> <p>Two other narrow access points are provided off Defynnog Road (a very narrow, sloping side-road).</p>	--
Public Transport Access	<p>The nearest bus stop is located approximately 80m away on the A40. This provides (approximately) an hourly service (during peak times) to settlements such as Llandovery, Swansea and Brecon.</p> <p>The nearest railway station is located at Llandovery, approximately 20km away.</p>	0
Pedestrian/cycle access	<p>The nearest National Cycle Route (No. 8 The Taff Trail) is located in Brecon (approximately 13km away).</p> <p>Pavements are provided on some parts of Defynnog Road, although space for pavements is constrained by the narrow nature of this road. In addition to this, pavements are largely absent within the Site itself.</p> <p>No cycle provision in the vicinity of the Site.</p>	-
Proximity to residential areas and community facilities	<p>Residential uses are located on the immediate western boundary. A livestock market is located to the south-west of the Site, alongside a Primary School. Agricultural land is located to the west of the Site.</p> <p>A public House (The Railway Inn) is located within 100m of the Site.</p>	++
Brown/Greenfield Status	Brownfield	++
Adjoining Uses	<p>Residential uses are located on the immediate western boundary. A livestock market is located to the south-west of the Site, alongside a Primary School. Agricultural land is located to the west of the Site. To the north is a small car park and community centre.</p>	-

Criteria	Comment	Score
Relationship with Built Environment	The Site is located within the settlement boundary and relates well to the existing urban form.	++
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	No known ecology constraints upon development.	++
TPOs	No TPOs on or adjoining site.	++
Topography	Irregular topography but current use takes account of this.	0
Contamination	No contamination identified.	++
Flood Risk	The Site is not identified as being under risk from flooding.	++
Water Quality	River Usk is located approximately 200m north-west of the Site. No ditches or watercourses are apparent on the Site.	+
Impact on agricultural land	The site is brownfield and therefore its development would result in some impact upon agricultural land.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	The Site's ownership is unknown; there are no vacant units on the Site.	+
Pressure for other forms of development.	Identified in the Composite LDP as an existing Industrial Estate.	++
Overall Comments	<p>The Site is occupied largely by a timber treatment yard and mill. Although the Site is located close to the centre of Sennybridge it is tightly contained by (sensitive) neighbouring uses and its access points are constrained.</p> <p>Therefore on this basis the Site is scaled as 'average' (0).</p>	0

No. 15	Site ID SENNY2	Location Land adjoining Defynnog Road	Nearest Settlement Sennybridge.	Area (ha) 1.43
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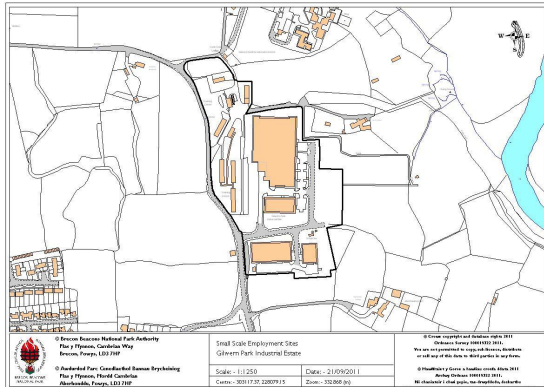


Criteria	Comment	Score
Road Access	The Site does not benefit from an existing vehicular access, although an agricultural gate is located on the eastern boundary of the Site, directly from the A4067. New vehicular access may be provided at this gateway and right hand turning lane although this will represent a significant cost.	-
Public Transport Access	The nearest bus stop is located approximately 400m away on the A40. This provides (approximately) an hourly service (during peak times) to settlements such as Llandovery, Swansea and Brecon. The nearest railway station is located at Llandovery, approximately 20km away.	-
Pedestrian/cycle access	The nearest National Cycle Route (No. 8 The Taff Trail) is located in Brecon (approximately 13km away). Pavements are provided on parts of Defynnog Road, although space for pavements is constrained by the narrow nature of this road especially close to the junction with the A40. No cycle provision in the vicinity of the Site.	-
Proximity to residential areas and community facilities	Residential uses are located beyond Defynnog Road, on the southern boundary. The change in levels between the houses and the Site in question presents a key consideration for any future development. An existing Industrial Estate is located to the west of the Site and the rear of Hay and Brecon Farmers (agricultural supplies) is located to the north of the Site. The A4067 forms the eastern site boundary. A public House (The Railway Inn) is located within 300m of the Site.	+
Brown/Greenfield Status	Greenfield	--
Adjoining Uses	Residential uses are located beyond Defynnog Road, on the southern boundary. The change in levels between the existing residential properties and the Site in question presents a key	-

	<p>consideration for any future development but does not necessarily preclude development.</p> <p>An existing Industrial Estate containing a saw mill/timber treatment works is located to the west of the Site and the rear of Hay and Brecon Farmers (agricultural supplies) is located to the north of the Site. The co-location of this Site, adjacent to these existing employment uses offers up opportunity for co-location, although it is likely that a noise impact assessment and noise mitigation will be requested as part of future planning permission.</p> <p>The A4067 forms the eastern site boundary.</p>	
Relationship with Built Environment	The Site is located within the settlement boundary and relates reasonably well to the existing urban form.	+
Proximity to Infrastructure	Water, electricity and telecommunications all connections available adjacent to site. Constraints on sewer and waste water treatment in the area is noted.	+
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No.	0
Ecology	No known ecology constraints upon development although due to the Greenfield nature of the Site, ecology issues may need to be considered prior to development.	+
TPOs	No TPOs on or adjoining site.	++
Topography	Site sloped steeply. This will represent a major constraint on development.	--
Contamination	The Site's location adjacent to a saw-mill /timber treatment works and being located within 50m of a disused railway may mean the Site is subject to contamination.	+
Flood Risk	The Site is not identified as being under risk from flooding	++
Water Quality	River Usk is located approximately 250m north-west of the Site. No ditches or watercourses are apparent on the Site.	+
Impact on agricultural land	The site is greenfield and is currently used for agriculture. However it is not classified as Grade 1, 2 or 3a.	0
Viability	The gradient of the Site is likely to present a significant site cost, which may risk undermining the Site's viability.	-
Ownership/site availability	The Site's ownership is not yet known (BBNPA awaiting land Registry Search). However it is understood that the Site is available for development although due to water/sewer constraints in the area DCWW has requested the Site be phased towards the end of the Plan Period (from 2016).	+
Pressure for other forms of development.	Allocated in the Composite LDP as a mixed use site (A1, A2, A3, B1, B2 and B8 uses). Residential use on the Site is not considered appropriate by BBNPA.	++

Criteria	Comment	Score
Overall Comments	<p>A small, steeply sloping, greenfield site adjacent to an existing Industrial Estate and some sensitive uses. The Site's steep gradient is likely to represent a key factor due to inform any proposed development. In addition to this, vehicular access into the Site from the A4067 is also likely to costly. The flatter part of the Site, located away from residential areas, may be suitable for some forms of B1, B2 or B8 uses dependant on considerations relating to residential amenity and access. This flatter section of the Site is very small however is likely to yield viability issues.</p>	-

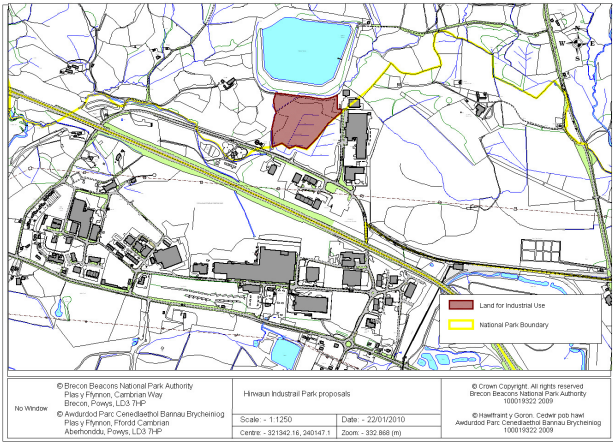
No. 16	Site ID GIL1	Location Gilwern Park Industrial Estate	Nearest Settlement Gilwern.	Area (ha) 4.2
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Criteria	Comment	Score
Road Access	The Site is accessible off an unclassified road (Cae Meldon), which is in turn accessed off the A4077. This access is free of constraints and is not congested.	++
Public Transport Access	The nearest bus stop is located approximately 500m, on the A4077. This provides an hourly bus service to settlements such as Brynmawr and Abergavenny. The nearest railway station is located at Abergavenny, approximately 6.3km away.	-
Pedestrian/cycle access	The nearest National Cycle Route (No. 49 The Brecon and Monmouthshire Canal) is located approximately 1.2km away – although linkages to this route are not direct as the canal is located beyond the A4077. Pavements are provided along one side of Cae Meldon on the approach into the Industrial Estate. Pavements are also provided within the body of the Industrial Estate. No formal cycle lane provision is included however.	0
Proximity to residential areas and community facilities	A public house and local shop is located approximately 1.2km from the Industrial Estate. Residential uses are located around 250m away from the Site.	0
Brown/Greenfield Status	Mostly brownfield with a greenfield plot on the western edge of the Industrial Estate, offering expansion potential.	+
Adjoining Uses	Site is surrounded by agricultural land and therefore the potential for bad neighbour impacts is minimised.	0
Relationship with Built Environment	The industrial Estate is separated from the main urban area of Gilwern and is surrounded by agricultural land in all directions. The Site is not designated within the settlement boundary of Gilwern but is within 100m of this boundary.	-
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints upon development.	++
Would development of	No	0

Criteria	Comment	Score
site present opportunity to remove eyesore		
Ecology	The River Usk is located approximately 300m west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is brownfield and includes some landscaping, trees and hedgerows around the site boundary. There are no known ecological issues on the Site however.	++
TPOs	No TPOs on or adjoining site	++
Topography	Flat site, topography does not represent a development constraint.	++
Contamination	No contamination identified	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) identified the Site as not being located within a defined Flood Zone but has some areas of 'less' susceptible to surface water flooding.	++
Water Quality	The River Usk is located approximately 300m west of the Site. No watercourses or ditches are apparent on the Site.	+
Impact on agricultural land	Site is mostly brownfield and the vacant greenfield plot is not used for agricultural purposes.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Site ownership is unknown. A number of vacant units and a vacant building plot was noted.	+
Pressure for other forms of development.	Site is identified as an existing employment Site in the composite LDP.	++
Overall Comments	The Site is functional Industrial Estate although is detached from the urban form of Gilwern. Access to public transport and community facilities is poor although the Site's proximity to the Heads of the Valleys Road means the Site is strategically well-located.	+

No. 17	Site ID HIR1	Location Land adj to 5th Avenue, Hirwaun Industrial Estate	Nearest Settlement Hirwaun.	Area (ha) 5
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Criteria	Comment	Score
Road Access	The Site is accessible off Fifth Avenue, an internal Industrial Estate. This Road links onto the A4061 (Rhigos Road) which in turn connects onto the A465 (Heads of the Valleys Road). The access roads are wide, largely unconstrained, not subject to congestion and are therefore suitable for Heavy Goods Vehicles (HGVs).	++
Public Transport Access	The nearest bus stop is located approximately 1km away on Rhigos Road. This bus stop provides half-hourly linkages to settlements such as Aberdare, Cwmaman, Rhigos, Cefn Rhigos and Maes-yr-Eglwys. The nearest Railway Station is located in Aberdare approximately 8.2km away.	-
Pedestrian/cycle access	Pavements are provided within the Industrial Estate itself although due to the greenfield nature of the Site, no pavements are currently provided within the Site itself. No formal cycle lane provision is provided within the vicinity of the Site although construction work is currently underway on the Valleys Cycle Network, which is proposed to run immediately adjacent to Site. This will provide links to near-by settlements such as Merthyr Tydfil and Glyn-Neath.	0
Proximity to residential areas and community facilities	The Site is relatively isolated from existing residential uses and community facilities. The High Street in Hirwaun is located approximately 2.8km away – this provides a range of community facilities. Whilst the nearest residential uses are located approximately 1.3km away on Halt Road.	--
Brown/Greenfield Status	Greenfield	--
Adjoining Uses	Site is located within an existing employment site and therefore its development would result in a clustering benefit. A near-by area is designated for a Regional Waste Facility in the Rhondda Cynon Taff Local Development Plan (LDP), which may adversely impact upon future uses or market demand in the future (if built out).	+
Relationship with Built Environment	Site is located within a large existing Industrial Estate but is identified as being outside the settlement boundary (as defined in the Brecon Beacons National Park Composite LDP). The Site is approximately 1km away from the nearest settlement boundary.	-
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0

Ecology	The Site is greenfield site located within an existing Industrial Estate. The Site is currently used for grazing horses. Due to the greenfield nature of the Site, ecology sensitivity issues may need to be addressed prior to development, also the proximity of the Cors Bryn y Gaer SSS1 and Blaen Cynon SAC is a key consideration.	0
TPOs	No TPOs on or adjoining site.	++

Criteria (cont.)	Comment (cont)	Score
Topography	Flat site, topography does not represent a development constraint.	++
Contamination	No contamination identified.	++
Flood Risk	The BBNPA Strategic Flood Risk Assessment (September 2011) does not encompass the Site; however the Development Advice Maps (DAMs) identify the majority of the Site as being within Flood Zone B.	0
Water Quality	No watercourses or ditches are apparent on-site although the Site is located within 100m of Penderyn Reservoir.	0
Impact on agricultural land	The Site is used for grazing however it is not grade 1, 2 or 3a.	0
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Site ownership is known, the Site is a vacant plot which is available for development immediately.	++
Pressure for other forms of development.	Site is actively being promoted for employment development. A planning application was approved on the Site for a sustainable waste resources recovery and energy production (includes B1 and B2 uses) in December 2010 (LPA Ref: 08/02488/FUL).	++
Overall Comments	A greenfield site within a large existing Industrial Estate. The Site has been actively marketed for development and is likely to be appropriate for B1, B2 and B8 uses. The Site is located away from residential uses and community facilities, but is linked to these areas via bus. Development will need to consider ecology in light of the proximity of a SSSI and SAC.	0

No. 18	Site ID GLAN1	Location Cwrt-Y-Gollen, Glangrwyney	Nearest Settlement Hirwaun.	Area (ha) 22.8
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Criteria	Comment	Score
Road Access	Site is accessible directly off the A40. The road is not congested but is fast-moving – 60mph speed limit.	++
Public Transport Access	The nearest bus stop is located directly outside the Site, on the A40. This provides an hourly bus service to Brecon and Abergavenny. The nearest railway station is located at Abergavenny, approximately 10km away.	0
Pedestrian/cycle access	The nearest cycle route is located in Glangrwyney (approx. 3km away); this is National Cycle Route 49, which is located alongside the Brecon and Monmouthshire Canal path. Pavements are provided on one side of the A40 providing a link to Cwrt-Y-Gollen from both Crickhowell and Glangrwyney. No formal cycle provision is located within the vicinity of the Site.	0
Proximity to residential areas and community facilities	The Site is located immediately adjacent to a residential area (to south-east). Agricultural land is located to the north-west and west. A woodland is located to the east of the Site. Glangrwyney centre is located approximately 500m away – this contains a Public House. Crickhowell Square is approximately 2.3km away and provides a larger range of local facilities.	-
Brown/Greenfield Status	Mostly greenfield but some parts are brownfield	-
Adjoining Uses	The Site is located immediately adjacent to a residential area (to south-east). Agricultural land is located to the north-west and west. A woodland is located to the east of the Site. The Site not allocated within the LDP settlement boundary and is therefore classed as open countryside – although it is located within around 100m of the defined boundary	0
Relationship with Built Environment	The Site not allocated within the LDP settlement boundary and is therefore classed as open countryside – although it is located immediately adjacent to the defined boundary.	-

Criteria	Comment	Score
Proximity to Infrastructure	Water, electricity and telecommunications all connected to site.	++
Landscape Sensitivity	No known landscape constraints on development.	++
Would development of site present opportunity to remove eyesore	No	0
Ecology	The River Usk is located approximately 400m west of the Site. The River is designed as a Special Area of Conservation (SAC) and a Site for Special Scientific Interest (SSSI). The site is mostly greenfield, with some brownfield areas. The Site includes a large number of mature trees and hedgerows which may be sensitive in terms of ecology. Tributary of the Usk (Grwyne Fawr) approximately 50m to the east of the site – part of the River Usk SAC and SSSI.	0
TPOs	Some TPOs are located on-site.	0
Topography	Reasonably flat site – topography does not represent a development constraint.	++
Contamination	No contamination identified	++
Flood Risk	A large part of the Site is identified as being in DAM Flood Zone C2.	--
Water Quality	The River Usk is located approximately 400m south-west of the Site. No watercourses or ditches are apparent on the Site.	+
Impact on agricultural land	Land is not used for agriculture.	++
Viability	No significant site costs or limited market demand which would undermine viability.	0
Ownership/site availability	Site ownership is known and is available for redevelopment.	++
Pressure for other forms of development.	The Site was subject to an Appeal for a mixed-use development (housing, employment, care and education uses). The Appeal was dismissed.	-
Overall Comments	A large prominent Site located outside of the settlement boundaries, between the urban areas of Crickhowell and Glangrwyney. Access to public transport is currently poor and the Site is physically separate and relatively isolated in this respect. The Site may be suitable for some forms of B1, B2 or B8 uses dependant on considerations relating to access and residential amenity.	0

Appendix 3

Site Assessment Criteria for Existing Employment Sites

Appendix 3: Brecon Beacons National Park Employment Site Review: Existing Employment Sites Assessment Matrix

		--	-	0	+	++
Access	Road Access	Difficult / narrow access via roads that are unsuited to high traffic flows; sloping / bending access roads; difficult site junction; high level of congestion	Access problematic and constrains the development.	Good access – minor constraints exist. e	High quality access which provides safe and suitable for the site	High quality access exists with no constraints via free moving, good quality local roads; generally limited level of congestion and unconstrained junctions
	Public Transport Access	Site more than 1000m walking distance from existing public transport services or not on bus route.	Site within 1000m walking distance of existing public transport services or site on public transport route without existing bus stop/train station.	Public transport services located on or adjacent to the site with at least hourly services to/from a town centre.	Public transport services located on or adjacent to site with regular services and 5 mins or less journey time to a town centre.	Regular public transport services available on site or immediately adjacent to site with excellent links to a town centre.
	Pedestrian / cycle access	No pavements or cycle lanes in the vicinity of the site; inadequate crossing facilities. Unsafe and inconvenient access links to site e.g. difficult / steep route	Limited pedestrian and cycle facilities in the vicinity of the site at present and potential difficulties in providing enhancement (i.e. due to access difficulties or restricted carriageway with creating restricting opportunity to extend cycle lane)	Reasonable existing pedestrian and cycle facilities in the vicinity of the site.	Reasonable existing pedestrian and cycle access to the site.	Easy and safe access to site via wide pavements and cycle lane. Good opportunity to promote walking or cycling to work.
	Proximity to residential areas and community facilities	Site located over 1,000m away from existing residential area or community services.	Site located between 500 and 1,000m of existing small village/residential area or community facilities.	Site located within 500m of large village/ residential area or community services	Site located within 500m of a significant existing residential area and community services	Located within a significantly large residential area with a wide variety of local facilities
n /	Brownfield / Greenfield status	100% greenfield site	Site predominantly greenfield (more than 75%)	Roughly 50/50 brownfield / greenfield	Site predominantly brownfield (more than 75%)	100% brownfield site
	Adjoining uses	Site in open countryside	Development of site for	Site on edge of urban	Site within existing urban	Site within or

Appendix 3: Brecon Beacons National Park Employment Site Review: Existing Employment Sites Assessment Matrix

	--	-	0	+	++
	away from any forms of development	B Class purposes likely to be adversely affected by or affect surrounding uses	area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development	area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development	immediately adjacent to an existing employment site – clustering benefits
Relationship with built environment	Site in open countryside away from settlement.	Site in open countryside but within 100m of settlement boundary.	Development located on settlement boundary.	Site within existing settlement but does not relate well to the existing urban form.	Site within existing settlement and relates well to existing urban form
Proximity to Infrastructure	Site is some distance from utility infrastructure	Utility infrastructure is available in the area and access could be provided although not necessarily easily	Utility infrastructure available within reasonable distance (100m) of the site and provision is realistically available	Good range of infrastructure already available within the vicinity of the site and provision is realistically available	Good range of infrastructure already available on the site
Landscape Sensitivity	Highly sensitive landscape area representing a major constraint on development		Landscape sensitivity issues need to be addressed prior to development but need not constrain options for the site, subject to a consideration of the layout		No known landscape constraints upon development
Would development of site present the opportunity to remove an eyesore	No and development would result in loss of amenity value		No		A significant eyesore would be removed. Development could result in a substantial enhancement in the visual quality of the site
Ecology	Highly sensitive ecology on site representing a major constraint on development		Ecology sensitivity issues have been addressed but have not constrained development.		No known ecology constraints upon development
TPOs	Large number of TPOs	Large number of TPOs	Limited number of TPOs	Limited number of TPOs	No TPOs on or adjoining

Appendix 3: Brecon Beacons National Park Employment Site Review: Existing Employment Sites Assessment Matrix

	--	-	0	+	++	
	on site which undermines development	on site but does not significantly reduce capacity for development	on site but taken account of through design and layout	adjoining site but no impact upon development	site	
Topography	Steeply sloping or irregular site represents a major constraint upon development		Irregular topography will have implications upon development which can be overcome through design and engineering solutions		Generally level site with no constraints upon development arising from topography	
Contamination	Highly contaminated sites in need of significant remediation	Contamination identified, significant remediation required	Contamination identified, some remediation required	Contamination identified, minor remediation required	No contamination identified	
Flood Risk	A significant part or all of the site within C2 flood risk zone	Majority or all of site in flood risk zone C1	Majority or all of site in flood risk zone B	Site partly in flood risk zone A and part in zone B	Majority or all of site within flood risk zone A	
Water Quality	Ditches and watercourses present on site	Ditches and watercourses present on the immediate edge of site	Ditches and watercourses present within 100 metres of the site boundary	Ditches and watercourses present between 100 and 500 metres of the site boundary	Site more than 500 metres from any watercourses	
Impact on agricultural land	The Site is classified as Grade 1, 2 or 3a agricultural land		The Site is not classified as 1, 2 or 3a agricultural land.		Site not agricultural land	
Market Conditions	Viability	Significant site costs AND limited market demand undermines viability of development	Significant site costs OR limited market demand undermines viability of development	Balance of site costs and market demand unlikely to undermine viability of development	Balance of site costs and market demand likely to encourage viability of development	High value development on site
	Ownership / Site Availability	Site unavailable for development	Site available for development but possible ransom strip issues	Site not being promoted for development at this time but likely to become available at a later stage	Site being promoted for development but some ownership constraints exist	Site ownership known and plot(s) available for immediate development
	Pressure for other forms of development	Site being developed or benefits from planning permission / allocation	Alternative use of land being actively pursued	No known pressure for alternative forms of development	Site being actively promoted for B Class uses	Site benefits from planning permission / allocation for B Class

Appendix 3: Brecon Beacons National Park Employment Site Review: Existing Employment Sites Assessment Matrix

		--	-	0	+	++
	for alternative purposes					uses

Appendix 4 Site Assessment Criteria for Potential Employment Sites

Appendix 4: Brecon Beacons National Park Employment Site Review: Potential Employment Sites Assessment Matrix

		--	-	0	+	++
Access	Road Access	Difficult / narrow access via roads that are unsuited to high traffic flows; sloping / bending access roads; difficult site junction; high level of congestion	Access problematic and might constrain development potential	Good access can be easily achieved – minor constraints exist which can be overcome	High quality access could be provided which would be safe and suitable for the site without substantial cost implications	High quality access exists with no constraints via free moving, good quality local roads; generally limited level of congestion and unconstrained junctions
	Public Transport Access	Site more than 1000m walking distance from existing public transport services or not on bus route and provision of public transport services would be difficult/costly.	Site within 1000m walking distance of existing public transport services or site on public transport route without existing bus stop/train station but where these could be reasonably provided.	Public transport services located on or adjacent to the site with at least hourly services to/from a town centre.	Public transport services located on or adjacent to site with regular services and 5 mins or less journey time to a town centre.	Regular public transport services available on site or immediately adjacent to site with excellent links to a town centre.
	Pedestrian / cycle access	No pavements or cycle lanes in the vicinity of the site; inadequate crossing facilities. Unsafe and inconvenient access links to site e.g. difficult / steep route	Limited pedestrian and cycle facilities in the vicinity of the site at present and potential difficulties in providing enhancement (i.e. due to access difficulties or restricted carriageway with creating restricting opportunity to extend cycle lane)	Reasonable existing pedestrian and cycle facilities in the vicinity of the site and opportunity to enhance quality of links	Reasonable existing pedestrian and cycle access to the site and opportunity to enhance quality of links	Easy and safe access to site via wide pavements and cycle lane. Good opportunity to promote walking or cycling to work.
	Proximity to residential areas and community facilities	Site located over 1,000m away from existing residential area or community services.	Site located between 500 and 1,000m of existing small village/residential area or community facilities.	Site located within 500m of large village/residential area or community services	Site located within 500m of a significant existing residential area and community services	Located within a significantly large residential area with a wide variety of local facilities

Appendix 4: Brecon Beacons National Park Employment Site Review: Potential Employment Sites Assessment Matrix

	--	-	0	+	++	
Site location / Characteristics	Brownfield / Greenfield status	100% greenfield site	Site predominantly greenfield (more than 75%)	Roughly 50/50 brownfield / greenfield	Site predominantly brownfield (more than 75%)	100% brownfield site
	Adjoining uses	Site in open countryside away from any forms of development	Development of site for B Class purposes likely to be adversely affected by or affect surrounding uses	Site on edge of urban area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development	Site within existing urban area, adjoining uses that would neither adversely affect nor be adversely affected by B Class development	Site within or immediately adjacent to an existing employment site – clustering benefits
	Relationship with built environment	Site in open countryside away from settlement.	Site in open countryside but within 100m of settlement boundary. Development would have adverse impact upon settlement form but mitigation possible	Development located on settlement boundary. Potential exists to integrated site into existing settlement form, subject to design and layout considerations	Site within existing settlement but development would result in change from the existing form of the surrounding area	Site within existing settlement and relates well to existing urban form
	Proximity to Infrastructure	Site is some distance from utility infrastructure and provision is likely to be complex and costly	Utility infrastructure is available in the area and access could be provided although not necessarily easily	Utility infrastructure available within reasonable distance (100m) of the site and provision is realistically available	Good range of infrastructure already available within the vicinity of the site	Good range of infrastructure already available on or adjacent to the site
	Landscape Sensitivity	Highly sensitive landscape area representing a major constraint on development		Landscape sensitivity issues need to be addressed prior to development but need not constrain options for the site, subject to a consideration of the layout		No known landscape constraints upon development
	Would development of site present the opportunity to remove an	No and development would result in loss of amenity value		No		A significant eyesore would be removed. Development could result in a substantial enhancement in the

Appendix 4: Brecon Beacons National Park Employment Site Review: Potential Employment Sites Assessment Matrix

	--	-	0	+	++
eyesore					visual quality of the site
Ecology	Highly sensitive ecology on site representing a major constraint on development		Ecology sensitivity issues need to be addressed prior to development but need not constrain options for the site, subject to a consideration of the layout and phasing of development		No known ecology constraints upon development
TPOs	Large number of TPOs on site which would undermine the potential for development	Large number of TPOs on site but need not significantly reduce the capacity for development	Limited number of TPOs on site but could be taken account of through design and layout	Limited number of TPOs adjoining site but no impact upon development	No TPOs on or adjoining site
Topography	Steeply sloping or irregular site represents a major constraint upon development		Irregular topography will have implications upon development which can be overcome through design and engineering solutions		Generally level site with no constraints upon development arising from topography
Contamination	Highly contaminated sites in need of significant remediation	Contamination identified, significant remediation required	Contamination identified, some remediation required	Contamination identified, minor remediation required	No contamination identified
Flood Risk	A significant part or all of the site within C2 flood risk zone	Majority or all of site in flood risk zone C1	Majority or all of site in flood risk zone B	Site partly in flood risk zone A and part in zone B	Majority or all of site within flood risk zone A
Water Quality	Ditches and watercourses present on site	Ditches and watercourses present on the immediate edge of site	Ditches and watercourses present within 100 metres of the site boundary	Ditches and watercourses present between 100 and 500 metres of the site boundary	Site more than 500 metres from any watercourses
Impact on agricultural land	The Site is classified as Grade 1, 2 or 3a agricultural land		The Site is not classified as 1, 2 or 3a agricultural land.		Site not agricultural land

Appendix 4: Brecon Beacons National Park Employment Site Review: Potential Employment Sites Assessment Matrix

		--	-	0	+	++
Market Conditions	Viability	Significant site costs AND limited market demand would undermine the viability of development	Significant site costs OR limited market demand would undermine the viability of development	Balance of site costs and market demand unlikely to undermine viability of development	Balance of site costs and market demand likely to encourage viability of development	Potential for delivery of high value development on site
	Ownership / Site Availability	Site unavailable for development	Site available for development but possible ransom strip issues	Site not being promoted for development at this time but likely to become available at a later stage	Site being promoted for development but some ownership constraints exist	Site ownership known and available for immediate development
	Pressure for other forms of development	Site being developed or benefits from planning permission / allocation for alternative purposes	Alternative use of land being actively pursued	No known pressure for alternative forms of development	Site being actively promoted for B Class uses	Site benefits from planning permission / allocation for B Class uses

Appendix 5

Experian Economic Sectors by SIC Category

Experian 38 Sectors	Sector contains these 2-digit SIC divisions
1 Agriculture, Forestry and Fishing	01 Crop and animal production, hunting and related service activities 02 Forestry and logging 03 Fishing and aquaculture
2 Extraction and Mining	06 Extraction of crude petroleum and natural gas 05 Mining of coal and lignite 07 Mining of metal ores 08 Other mining and quarrying 09 Mining support service activities
3 Food, Drink and Tobacco	10 Manufacture of food products 11 Manufacture of beverages 12 Manufacture of tobacco products
4 Textiles and Clothing	13 Manufacture of textiles 14 Manufacture of wearing apparel 15 Manufacture of leather and related products
5 Wood and Paper	16 Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials 17 Manufacture of paper and paper products
6 Printing and reproduction of Recorded Media	18 Printing and reproduction of recorded media
7 Fuel Refining	19 Manufacture of coke and refined petroleum products
8 Chemicals	20 Manufacture of chemicals and chemical products
9 Pharmaceuticals	21 Manufacture of basic pharmaceutical products and pharmaceutical preparations
10 Rubber, Plastic and Other Non-Metallic Mineral Products	22 Manufacture of rubber and plastic products 23 Manufacture of other non-metallic mineral products
11 Metal Products	24 Manufacture of basic metals 25 Manufacture of fabricated metal products, except machinery and equipment
12 Computer and Electronic Products	26 Manufacture of computer, electronic and optical products 27 Manufacture of electrical equipment
13 Machinery and Equipment	28 Manufacture of machinery and equipment n.e.c.
14 Transport Equipment	29 Manufacture of motor vehicles, trailers and semi-trailers 30 Manufacture of other transport equipment

15 Other Manufacturing	31 Manufacture of furniture 32 Other manufacturing 33 Repair and installation of machinery and equipment
16 Utilities	35 Electricity, gas, steam and air conditioning supply 36 Water collection, treatment and supply 37 Sewerage 38 Waste collection, treatment and disposal activities; materials recovery 39 Remediation activities and other waste management services. This division includes the provision of remediation services, i.e. the cleanup of contaminated buildings and sites, soil, surface or ground water.
17 Construction of Buildings	41 Construction of buildings
18 Civil Engineering	42 Civil engineering
19 Specialist Construction Activities	43 Specialised construction activities
20 Wholesale	45 Wholesale and retail trade and repair of motor vehicles and motorcycles 46 Wholesale trade, except of motor vehicles and motorcycles
21 Retail	47 Retail trade, except of motor vehicles and motorcycles
22 Land Transport, Storage and Post	49 Land transport and transport via pipelines 52 Warehousing and support activities for transportation 53 Postal and courier activities
23 Air and Water Transport	50 Water transport 51 Air transport
24 Accommodation and Food Services	55 Accommodation 56 Food and beverage service activities
25 Recreation	90 Creative, arts and entertainment activities 91 Libraries, archives, museums and other cultural activities 92 Gambling and betting activities 93 Sports activities and amusement and recreation activities
26 Media Activities	58 Publishing activities 59 Motion picture, video and television programme production, sound recording and music publishing activities 60 Programming and broadcasting activities
27 Telecoms	61 Telecommunications
28 Computing and Information Services	62 Computer programming, consultancy and related activities 63 Information service activities
29 Finance	64 Financial service activities, except insurance and pension funding

	66 Activities auxiliary to financial services and insurance activities
30 Insurance and Pensions	65 Insurance, reinsurance and pension funding, except compulsory social security
31 Real Estate	68 Real estate activities
32 Professional Services	69 Legal and accounting activities 70 Activities of head offices; management consultancy activities 71 Architectural and engineering activities; technical testing and analysis 72 Scientific research and development 73 Advertising and market research 74 Other professional, scientific and technical activities 75 Veterinary activities
33 Administrative and Supportive Service Activities	77 Rental and leasing activities 78 Employment activities 79 Travel agency, tour operator and other reservation service and related activities 80 Security and investigation activities 81 Services to buildings and landscape activities 82 Office administrative, office support and other business support activities
34 Other Private Services	94 Activities of membership organisations 95 Repair of computers and personal and household goods 96 Other personal service activities 97 Activities of households as employers of domestic personnel 98 Undifferentiated goods- and services-producing activities of private households for own use
35 Public Administration and Defence	84 Public administration and defence; compulsory social security 99 Activities of extraterritorial organisations and bodies
36 Education	85 Education
37 Health	86 Human health activities
38 Residential Care and Social Work	87 Residential care activities 88 Social work activities without accommodation



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