

EUROPEAN REGIONAL DEVELOPMENT FUND

UK REGIONAL DEVELOPMENT PROGRAMME
1986-90

Section 8: Wales



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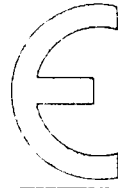
**UK REGIONAL DEVELOPMENT
PROGRAMME 1986-90**

Section 8: Wales

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European Regional Development Fund

UK REGIONAL DEVELOPMENT PROGRAMME 1986-90



Section 8: Wales

UK REGIONAL DEVELOPMENT PROGRAMME 1986-90

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PREFACE

Sections 1 to 6 of this Programme have described in general terms the main regional problems of the United Kingdom and the policies which are being applied to overcome them. Sections 7 to 10 describe in greater detail the situation in the areas where the UK may be seeking assistance from the European Regional Development Fund. In common with the preceding sections these regional profiles have been structured in accordance with the requirements of the outline for Regional Development Programme (official journal No C69/2 of 24 March 1976). Each profile is preceded by a summary table and map which together define the area covered and an index to the contents.

The regional profiles cover contiguous blocks of travel to work areas (TTWAs) which have Assisted Area Status or Aided Area Status and are thus eligible for ERDF assistance. As far as possible these are defined to coincide with local authority areas or groups of areas and have been considerably revised since the previous Regional Development Programme so as to facilitate the compilation and presentation of information in a sensible way. Unlike certain other Member States, the UK does not have a federal system or government. Institutional arrangements and the resulting administrative structure are both highly centralised with central planning undertaken through separate regional and sub-regional authorities. For strong functional reasons different sectoral planning authorities operate according to different regional boundaries. Some of the illustrative statistics in the Programme therefore may relate to slightly different areas because so much information is compiled using local authority districts, counties or some other sectoral planning units. The length and detail of the individual profiles vary as there is a considerable variation in geographical and demographic size. The variety has many advantages, for it is an opportunity to compare the operation and planning of regional development in areas of differing size and make up.

Although the outline provides a structure for each of the regional profiles considerable variety has been used in the definition and presentation of problems, plans and individual development measures to avoid a rigid format. As far as possible information has been presented to accord with the extent of each particular Profile area. However the sort of information and the level of detail required is not always readily available in the standard form for this purpose and could not be obtained except at disproportionate cost. Approximations or surrogate data for the nearest corresponding administrative unit have therefore been necessary. This approach over the structure and content illustrates the degree to which participation of local and

other public authorities has been essential in the preparation of Profiles. Local authorities in Northern Ireland have not however been involved in the preparation of Section 10 of the Programme.

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8A

WALES OVERVIEW

8A1. Wales covers an area of 2.1 million hectares, 8.6 per cent of the United Kingdom. The population of 2.8 million makes up 5.0 per cent of the UK total. The sum of incomes earned in Wales, however, is 4.3 per cent of the United Kingdom total, and on a per capita basis the Gross Domestic Product in Wales is only 86.1 per cent of the United Kingdom average, only Northern Ireland being less prosperous.

8A2. The bulk of the land mass is given over to agriculture: and some 80 per cent of agricultural area is now 'less favoured'. As a major part of Wales is mountainous and the remainder less suited to crop production, the main elements of agricultural income arise from the sale of livestock or livestock products, particularly milk, beef and mutton. The prosperity of the milk industry, until recently a major force for expansion has been severely affected by the imposition of quotas, and there are, of course, difficulties in beef markets. The industry is characterised by small farms: and although the numbers of employees have been falling, the overall population of farmers and farm workers is fairly stable.

8A3. Since the 19th Century, Wales has chiefly relied for wealth on a few basic heavy industries, mainly those associated with coal mining and metal manufacture. These grew up in a highly localised manner, largely in South Wales which has equal problems of terrain with rural areas to the West and North. These heavy industries have undergone a process of long-term decline, and although recent events have led to a recurrence of profitability the industries which have suffered severely in the early 1980s remain under threat. Owing to the problems of terrain and distance from major markets, it has proved difficult, despite massive Government assistance, to replace the jobs lost in the industrial areas of South and North Wales. Since 1979 employment in energy and water supply, metal manufacturing and chemicals has fallen by 60,000, these categories including the major losses in coalmining and iron and steel industries.

8A4. There have been major attempts to restructure Welsh industry, by introducing new activities into both industrial and rural Wales, partly through Government assistance in selected areas, but also through the use of

Development Agencies (see below). However, while there have been a number of successes, overall employment has continued to fall and if the manufacturing sector is taken as a group, the fall in the period 1979-85 was 110,000; while for the Production and Construction industries as a whole employment has fallen by 141,000. Output in Wales has been badly hit by the problems of basic industries, and overall industrial output in the third quarter of 1985 was 13.9 per cent lower than in 1979.

8A5. The major growth in Wales in this period has been the employment of women, largely in the service sectors (which includes such items as tourism) and mainly associated with work on a part-time basis: growth in employment must be discounted to allow for this and there may have been a fall in total hours worked. However, in the period 1979-85, female employment including that in production industries, fell by 14,000, whereas in contrast there was a rise of 15,000 in part-time working.

8A6. The overall economic activity rate in Wales is lower than any other region of Great Britain and is expected to remain so during the period that this programme covers. Historically, female activity rates for Wales have been very low in comparison with other areas and, in recent years, the male activity rate, conforming to the Great Britain pattern, has fallen quite rapidly. Activity rates for women have, in contrast, been rising, both because more women are employed but also because more women wish to undertake gainful employment and this, coupled with the declining employment for men, has meant that unemployment has risen very sharply in Wales.

8A7. Unemployment rates in Wales have been higher than those in Great Britain as a whole for a very long time. The recent national industrial decline, coupled with the disadvantages of Wales has meant that the rates in Wales are now very high, 17.7 per cent in February 1986 as compared with a national level of 14 per cent, and higher than in any UK region except Northern Ireland and the North of England. Within Wales rates vary with local conditions, and in those rural areas dependent on tourism and agriculture with the seasons. But rates of over 20 per cent are not uncommon, and in February 1986 rates over this level were experienced in about one third of the travel-to-work areas of Wales. Unemployment rates for men are, as a rule, considerably higher than those for women.

8A8. In sum, Wales is a relatively poor area of the United Kingdom, where a combination of declining heavy industry and slow industrial growth has led to a weakened position, with relatively low household incomes and high levels of unemployment. The nature of the terrain implies that certain districts are particularly hard hit and require massive efforts to revive their decaying infrastructure and to preserve employment and population among strong traditional communities.

Profile Areas

Industrial South Wales

8A9. The major centre of population is Industrial South Wales. This consists of a coastal plain, where Wales' largest cities are situated, and an area of mountain and valley to the north, the Valleys running broadly North to South. This area has been traditionally associated with heavy industry and consequently suffers most from its decline. Unemployment has risen, there is substantial migration outwards to the coastal plain and elsewhere in the United Kingdom. The nature of the valleys, once mainly based on a coal mining and steel working economy implies considerable difficulty in replacing job opportunities and indeed in the provision of the necessary infrastructure for declining communities.

North East Wales

8A10. North East Wales is an area of Wales which was not only dependent upon a limited range of industries - including steel works and textiles - which have been in a condition of severe decline, but is affected by the depressed condition of the North West of England (Merseyside) which it adjoins. This area has, paradoxically experienced population growth in the recent past: but it has also experienced a major decline in employment, and current levels of unemployment (February 1986) were near 20 per cent.

8A11. These two areas essentially represent industrial Wales. Rural Wales can be divided between North West Wales, Mid-Wales and South West Wales: each of these covers a large but hilly or mountainous area, often of great visual beauty, and is a major agricultural or tourist area.

North West Wales

8A12. North West Wales covers both the major massif of Snowdonia and the isle of Anglesey. The latter is a chief agricultural area and both are famous tourist areas, particularly Snowdonia which is a designated National Park. The area remains subject to high levels of employment, which is also very much affected by seasonal factors: in February 1986 male unemployment levels of over 28 per cent were experienced in the area.

Mid-Wales

8A13. Mid-Wales is perhaps the most sparsely populated area in Wales, largely agricultural and mountainous to the extent that the major part is designated a 'less favoured' area. Population decline was a common feature till about 1970; since then, however, population has been rising due to inward migration. The area has been relatively prosperous and in some parts relatively low unemployment rates have been experienced, despite the very poor employment prospects offered by the economic base. Its problems are sparsity of population and lack of infrastructure.

South West Wales

8A14. South-West Wales is also largely rural and contains a milk producing base. Its largest industrial area surrounds the port of Milford Haven: but refinery activity, basic to the use of this facility has been declining. Although population has been rising, some parts of this area have experienced very high unemployment rates, though the position is patchy; the parts most severely affected being on the coast. Seasonal problems, associated with a number of coastal tourist centres, are also prominent.

Agencies

8A15. There are two special agencies of regional development operating in Wales:

- a. **The Welsh Development Agency** was established on 1 January 1976 for the purposes of furthering the economic development of Wales, promoting industrial efficiency and international competitiveness, and in that connection to provide, maintain or safeguard employment and furthering

the improvement of the environment. The Agency develops industrial estates, has a substantial programme of advance factory building to attract industry to Wales and also builds bespoke factories to suit the needs of individual firms. It provides business advice to small firms and also finance for industry by making loans on commercial terms and by investing in equity. In addition it coordinates and funds land reclamation schemes which are carried out by local authorities and assists with environmental improvement programmes. It promotes Wales as a location for industrial development. The Agency operates under the Welsh Development Agency Act 1975 and within administrative guidelines laid down by the Secretary of State for Wales. The Agency is funded primarily by central government (this net income formed around 60% of its total spending in 1985/86) but it also receives income each year from the sale of factories, rents, return on investments and other services. In July 1984 the Agency established its technological arm, known as **WINtech**, the aims of which are to encourage innovative performance amongst firms in Wales, particularly the need to accept and apply new technological developments, and to develop links between the institutions of higher education and industry. WINtech provides advice to firms, disseminates information on new technological developments and encourages co-operation between firms and with academic and government research links.

b. **Mid Wales Development**, the name now given for promotional purposes to the **Development Board for Rural Wales** which commenced operations on 1 April 1977, is responsible for promoting the economic and social development of the County of Powys and the districts of Meirionnydd in Gwynedd, NW Wales and Ceredigion in Dyfed, SW Wales. Under the Development of Rural Wales Act 1976 (which, together with administrative guidelines laid down by the Secretary of State for Wales, governs the Board's activities) the Board has a wide range of powers and functions; its efforts, primarily the provision of advance factories and industrial estates, are concentrated on certain locations in accordance with a scale of geographical priority designation. The Board has the particular responsibility for completing the development of Newtown, Powys. In addition it provides grant-aid, to voluntary bodies and others, for social projects and to local authorities and statutory bodies for social and economic projects, and conducts advertising and marketing programmes aimed at attracting mobile

industry and key workers to its area. It also acts as an agent for the Welsh Development Agency through the provision of grants to projects which assist with the creation or safeguarding of jobs. The Board is funded primarily by Central Government (about 75% of its total expenditure in 1985/86) and to a lesser extent from other sources - eg ERDF aid, revenue from the sale of assets and rents.

8A16. Other agencies operating exclusively in Wales and contributing to its development are:

a. **The Wales Tourist Board** was established under the Development of Tourism Act 1969, which provided for the setting up of a British Tourist Authority and the National Tourist Boards for England, Wales and Scotland. The Board's principal functions under the Act are to encourage people to visit Wales and people living in Wales to take their holidays there; and to encourage the provision and improvement of tourist amenities and facilities in Wales. Section 4 of the Development of Tourism Act gives the Board powers to offer discretionary financial assistance to projects which, in its opinion will provide or improve tourist amenities and facilities. In considering applications for assistance the Board is required to take into account, inter-alia, the potential for increasing employment opportunities and the approval of the Secretary of State for Wales is required for funding over specified financial limits (currently £200,000). Within the machinery of the Board the North, Mid and South Wales Tourism Councils were established. Each Council has a Joint Policy Committee, comprising local authority and trade members, whose task is to advise the Board on pertinent matters of policy. In addition, each Council has a Development Panel and a Marketing Panel, which debate and advise on specific technical issues. The key functions of the Board's Regional Offices include managing in conjunction with local authorities and other relevant agencies the work of the Tourist Information Centre network and organising a variety of collective marketing activities. The Wales Tourist Board is funded primarily by Central Government and to a lesser extent from marketing and sales revenue and local authority contributions.

b. **Wales Investment Location (WINVEST)** was established on 1 April 1983 to bring together in one unified operation the overseas promotional and marketing activities that had been carried out for many years by the Development Corporation for Wales, and the inward investment responsibilities of the Welsh Office Industry Department and the Welsh Development Agency. Operationally WINVEST acts as a division of the Welsh Development Agency, with Welsh Office Industry Department support. WINVEST's activities are subject to review by a Steering Committee chaired by the Secretary of State.

c. **The Land Authority for Wales** makes development land available by buying and then selling it to others to develop. Operative since April 1976, the Authority was first established in order to implement the community land scheme; since November 1980, however, it has been functioning under Part XII of the Local Government, Planning and Land Act 1980 with the main task of bringing forward sites where the private sector would find this difficult or impossible owing to physical, planning or ownership constraints. The Authority has no power to carry out development itself but it can provide infrastructure before disposing of a site. The provision of housing land is expected to take priority, but the Authority also makes land available for industry and commerce. The Authority is required to be self-financing, although it has a limited borrowing power.

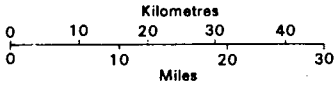
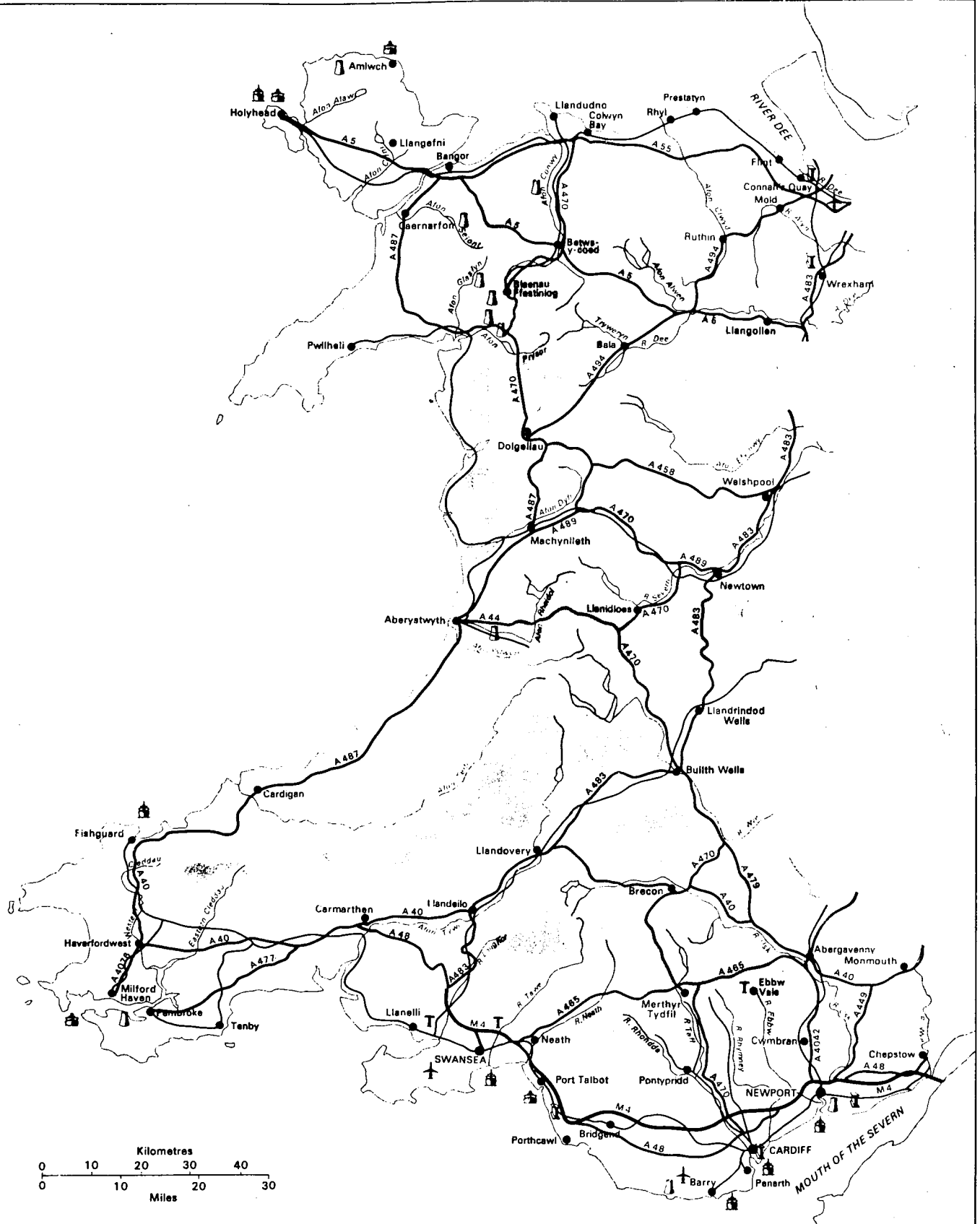
8A17. Other authorities, bodies and agencies acting in Wales to promote its development have counterparts elsewhere in the UK but reflect in their activities the differing priorities of the development of Wales. These include the County and District Councils, port and airport authorities, Wales Gas, Wales and Marches Telecommunications Board, South Wales Electricity Board (SWEB), Merseyside and North Wales Electricity Board (MANWEB), British Rail and the Welsh Water Authority. For example, the 1973 Water Act which set up the Water Authorities, including the Welsh Water Authority, also requires the Secretary of State for Wales to promote a national policy for water. British Rail are also drafting a programme covering their investment plans for the next 5 years which will form the basis of an application for assistance from the ERDF under the EC Fund regulation 1787/84 as a national programme of community interest. The Cwmbran Development Corporation, established to provide a balanced development programme of housing, industry, commerce and recreation in the new town of Cwmbran (designated in 1949), has more recently

had a special role to play in the development of new industry to offset the run-down of employment at Llanwern steelworks. To allow the Corporation a reasonable time to complete its major remaining tasks it was announced on 10 February 1984 that the wind-up date should be 31 March 1988. The Small Firms Service, administered by the WDA in association with the Department of Employment, provides a range of information and advice to small businesses throughout Wales, working closely with the Welsh Development Agency's Business Development Unit and with the Development Board for Rural Wales. The Urban Programme in Wales in 1986/87 continues to place great emphasis on those schemes which lead to economic regeneration and job creation. This is being achieved through the provision of nursery factory units, hi-tech industrial innovation centres, industrial infrastructure, grants and loans in declared Commercial and Industrial Improvement Areas and other miscellaneous economic initiatives which are directed at the stimulation of, particularly, the small business sector. The introduction of the Urban Development Grant scheme from April 1982 has also resulted in a substantial private sector input into the renewal of urban areas. Enterprise zones have been established at Swansea in Industrial South Wales, Delyn in North East Wales and on both sides of the Milford Haven Waterway in South West Wales with the aim of restoring vigorous activity to the areas concerned by removing certain tax burdens and by relaxing or speeding up the application of certain statutory or administrative controls. Cardiff in Industrial South Wales has one of the 6 experimental freeports in Great Britain designated in August 1984 with the aim of testing whether the relaxation of certain controls would benefit trade and industry.

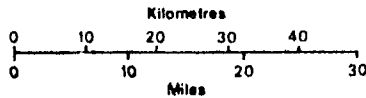
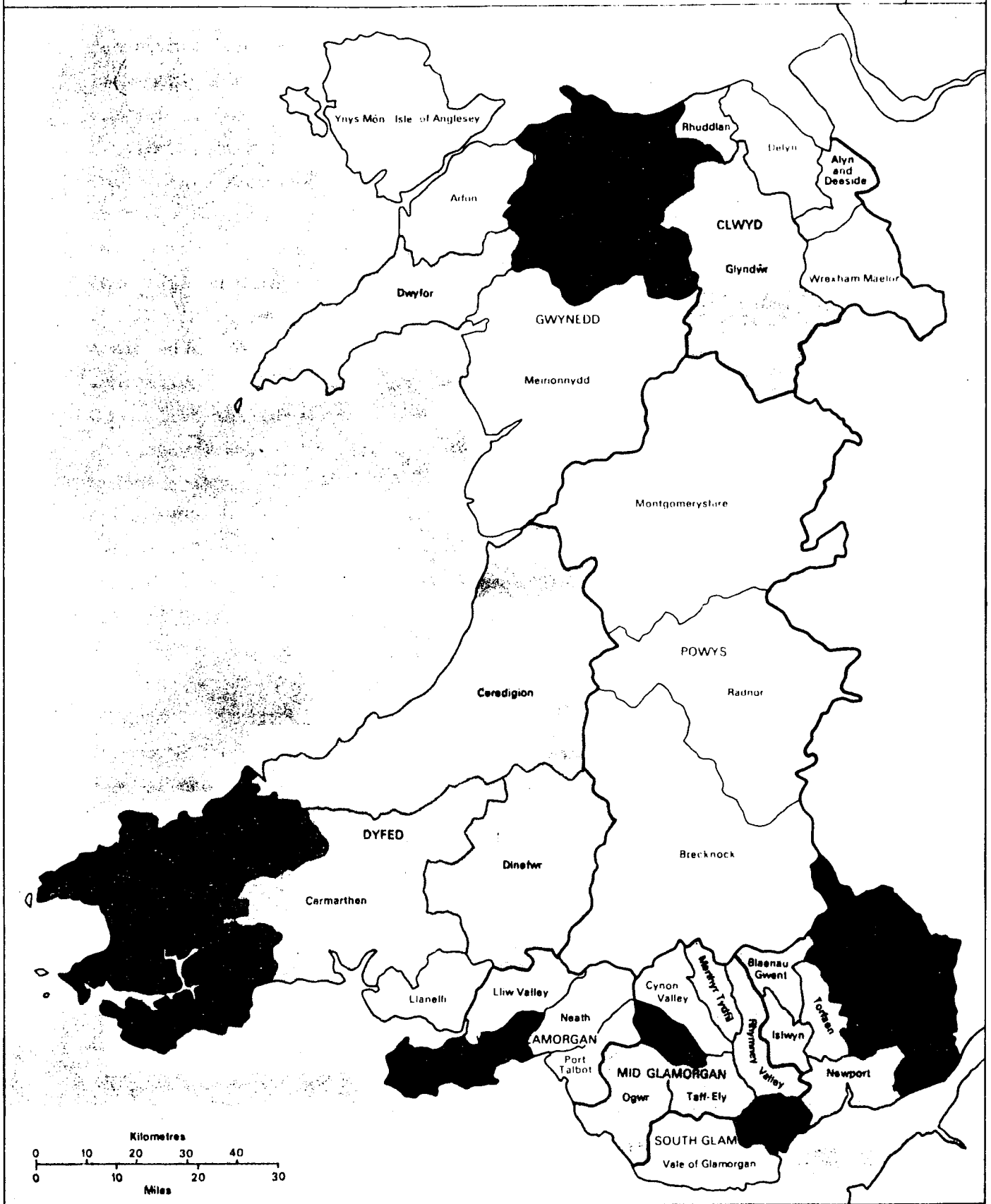
WALES

GENERAL REFERENCE MAP

1



Motorway	—	Major Steelworks	⌚
Trunk Road Network	—	Main Port	⚓
Passenger Rail Service	—	Ore or Oil Terminal	⚙️
Electricity Generating Station	⚡	Airport	✈️
Major Tin Plate Works	T	Land over 1,000 feet	

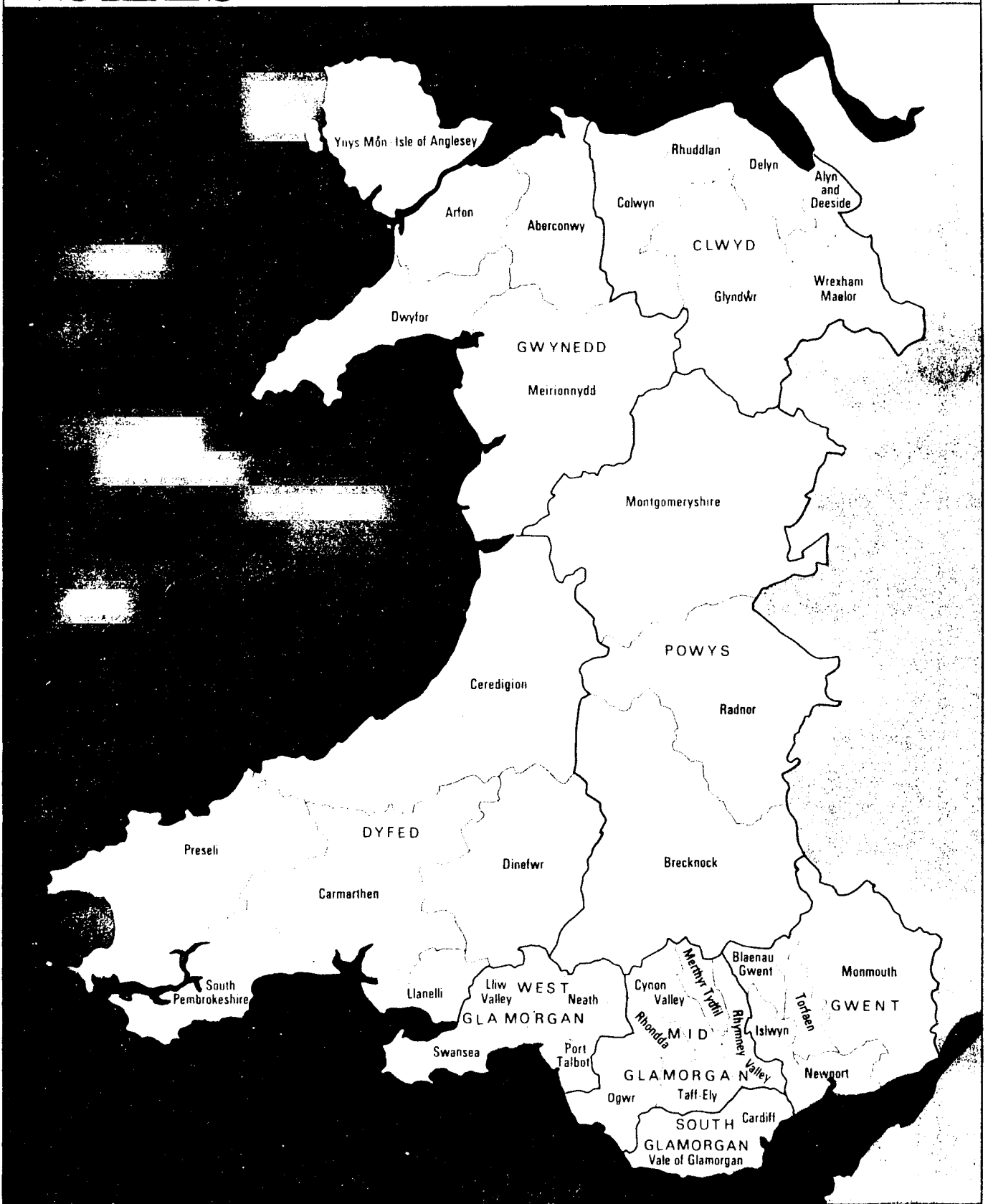


SPARSITY

- > 5 hectares per person
- 2-5 hectares per person
- > 1-2 hectares per person

DENSITY

- 1-4 persons per hectare
- 4-7 persons per hectare
- 7-9 persons per hectare
- 23.3 persons per hectare



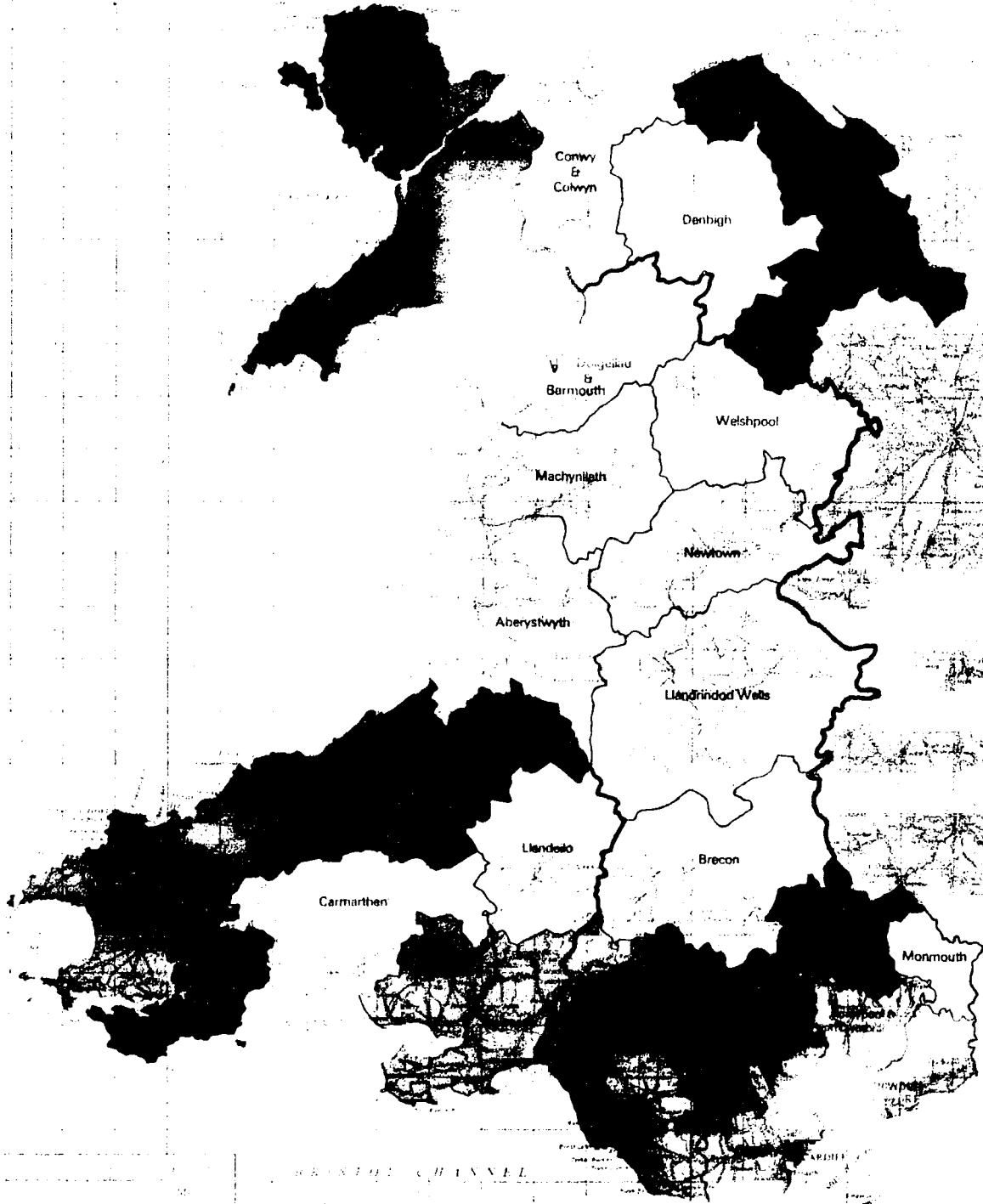
Administrative Boundaries
(as at 1. 4. 86)



County ———



District - - - - -

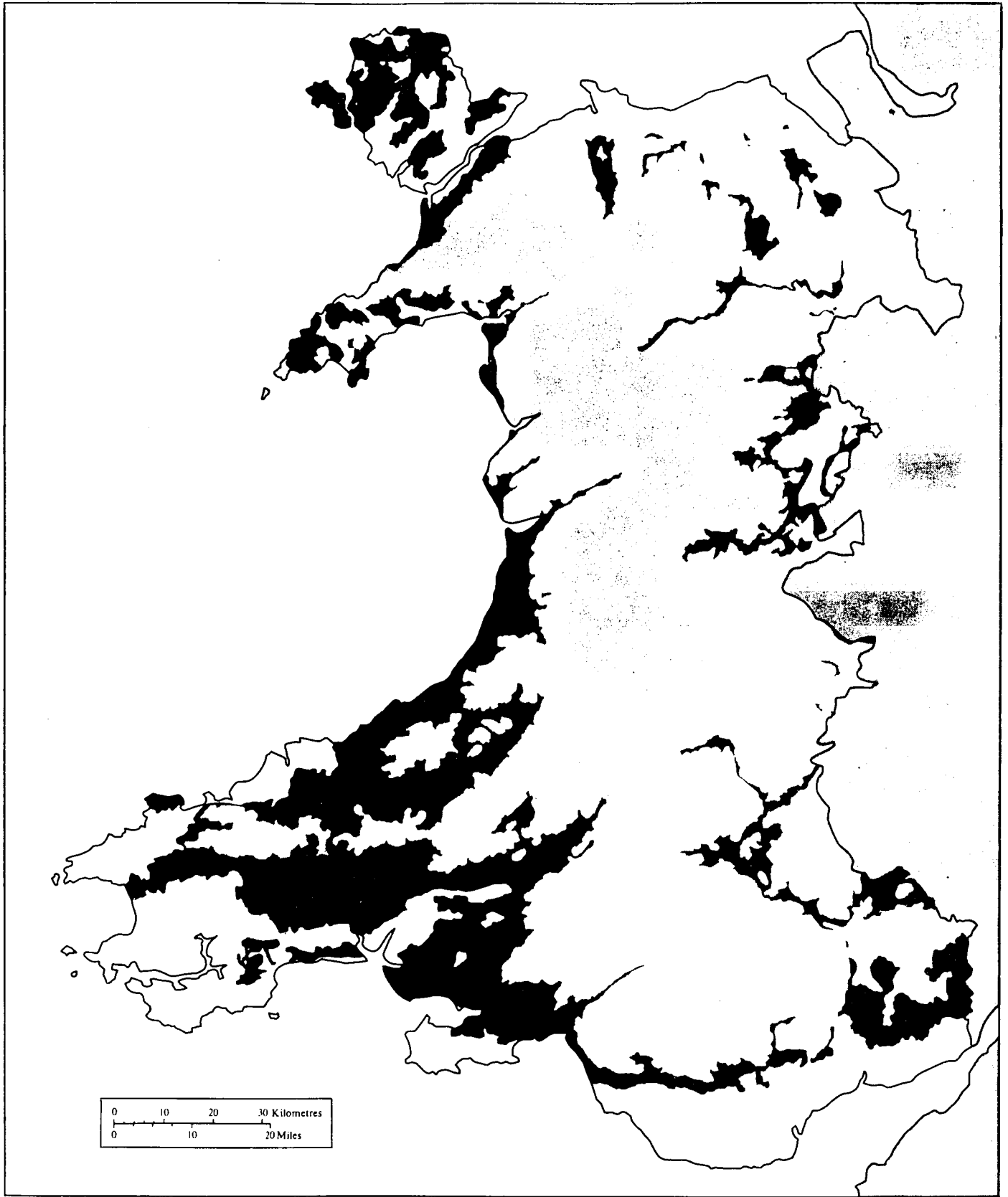
ASSISTED AREAS

4



Travel to Work Area Boundary  Pwllheli
 Development Board for Rural
 Wales (D.B.R.W.) Boundary 

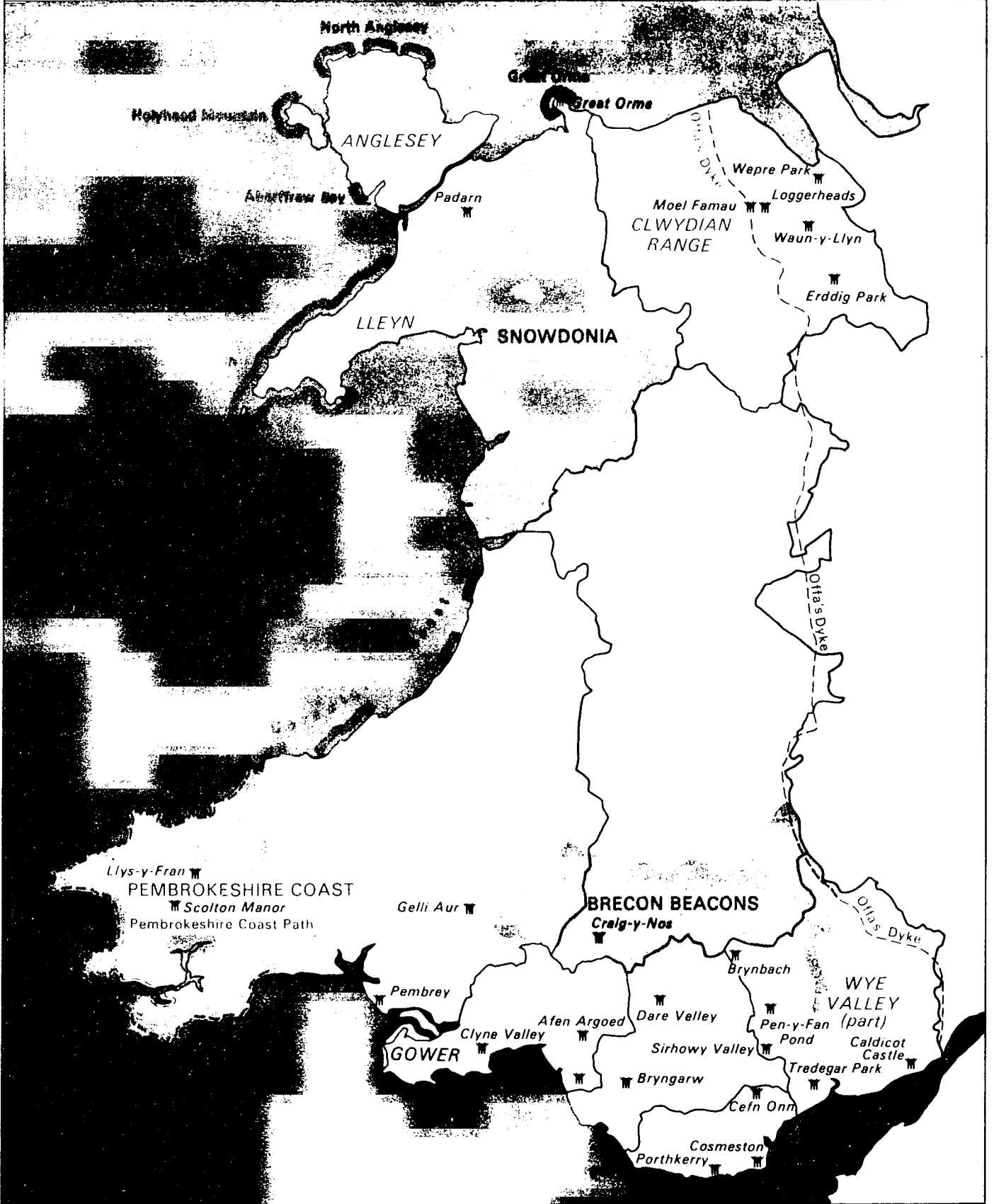
Development Area 
 Intermediate Area 
 Effective from 28 November 1984








Area A

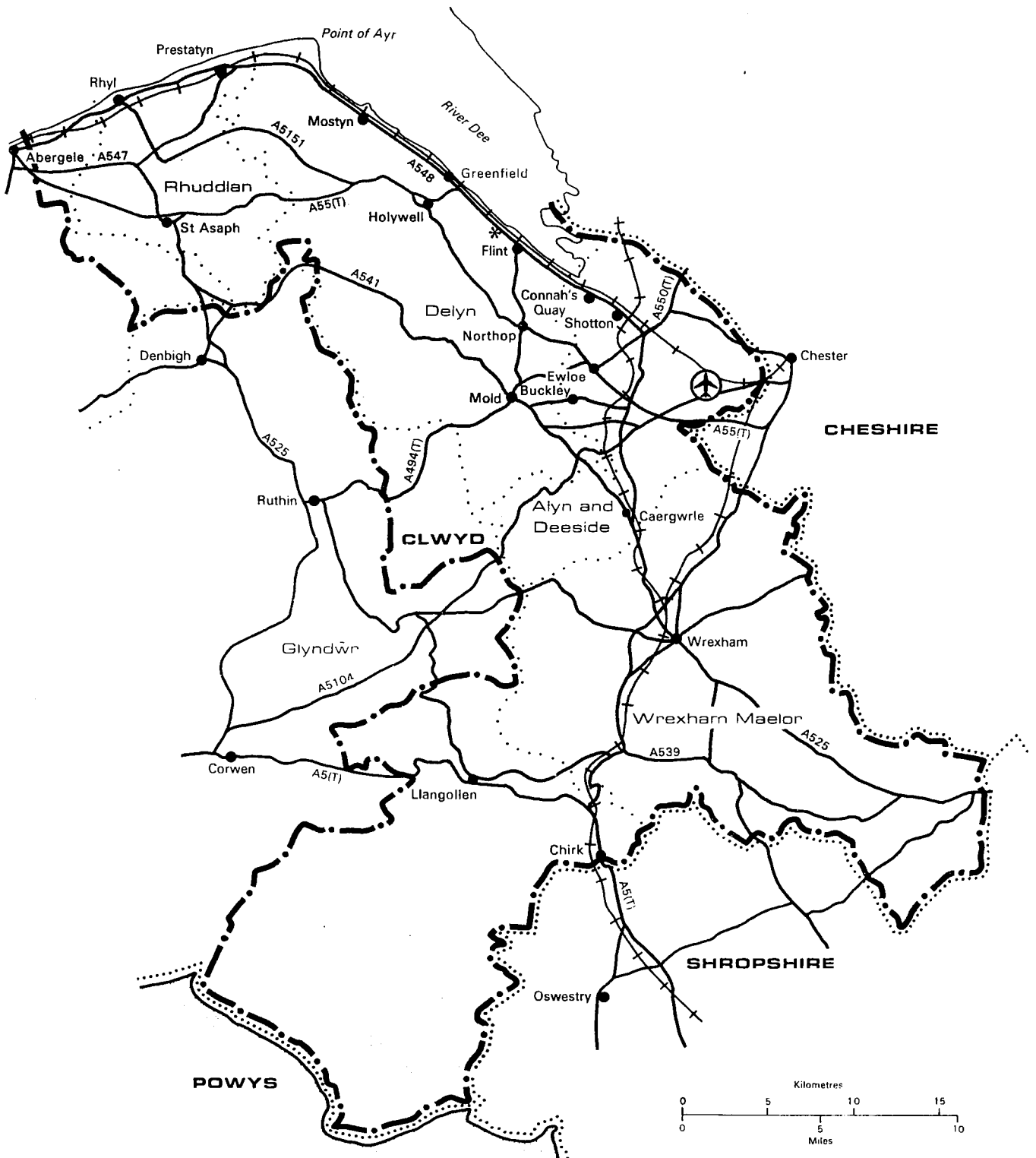
Area B





- National Park 
- Area of Outstanding Natural Beauty 
- Heritage Coast 
- Long Distance Path 
- Country Park 

NORTH EAST WALES PROFILE AREA



Profile Area Boundary		Major Road	
Assisted Area		Main Railway	
D.B.R.W. Boundary		Enterprise Zone	
County Boundary		Airport	
District Boundary			

Assisted Area Profile**WALES - NORTH EAST****Statistical summary**

Area (hectares)			132,025
Usually resident population			320,204
Density (persons per hectare)			2.425
Unemployment	June 1983	June 1984	June 1985
Thousands	19.9	19.3	20.0
Rate	17.6	17.1	17.7
Index (UK = 100)	141.9	136.8	135.1

Employment profile 1981 (SIC 80 Divisions)

	Thousands	per cent
Agriculture, forestry and fishing	2.5	2.6
Energy and water supply	3.4	3.6
Extraction of minerals, manufacture of metals, chemicals and man-made fibres	11.8	12.2
Metal goods, engineering and vehicles	8.8	9.1
Other manufacturing	9.8	10.2
Construction	4.3	4.4
Distribution, hotels & catering, repairs	19.6	20.3
Transport and communications	3.9	4.0
Financial services	3.7	3.8
Other services	28.7	29.7
TOTAL	96.6	100.0

Source: Census of population 1981

Area definition by travel-to-work area and status:

Development areas : Shotton, Flint and Rhyl; Wrexham

Intermediate areas : None

NORTH EAST WALES**SECTION 1 - SOCIAL AND ECONOMIC ANALYSIS****A. DESCRIPTION****Geography**

8B1. The Assisted Areas of North East Wales occupy an area of 132,025 hectares and comprise much of the county of Clwyd, including the urban and industrial areas of north-east Clwyd, the coastal resorts of Rhyl and Prestatyn, and the largely rural areas of Maelor and the Tanat and Ceiriog valleys. They are bordered to the north by the Irish Sea, to the east and south-east by the counties of Merseyside and Cheshire, and to the south-west by Powys. To the west, the area is separated from rural Clwyd by the Clwydian Range of mountains, recently designated as an Area of Outstanding National Beauty.

8B2. The whole of the Assisted Area has Development Area status.

8B3. The area is one of contrasting settlement patterns, though it is dominated by highly urbanised concentrations in Deeside, around Wrexham and the 'urban villages', and along the coast. There is also a considerable rural population, together with small market/tourist towns such as Llangollen and St Asaph. Although North East Wales is relatively close to Merseyside, the area is some 350km from London and 275km from Industrial South Wales.

Communications

8B4. The main railway line traverses the region from Holyhead through Chester to Crewe and then to the main industrial centres in England. Two other lines link the area with Merseyside and the main industrial centres in the north west of England and South Wales. There is a small civil airport at Hawarden, and a small privately owned port at Mostyn on the River Dee. The major port and dock facilities utilised are those on Merseyside and at Ellesmere Port, Cheshire which is on the western end of the Manchester Ship Canal.

8B5. Road communications in the area are generally east-west, including the A5(T) which is one of the main routes linking North Wales to the Midlands. Another increasingly important route is the A550 and the A483(T) which links the area with the North West of England and A5(T).

Population

8B6. In 1984 the assisted area had an estimated population of 327,500. At the time of the 1981 census only 29 per cent of the population lived in the largest urban areas of Wrexham (39,929), Buckley (16,693), Abergele (12,264), Flint (11,411), Holywell (11,101), Connahs Quay (14,750), Rhyl (22,600) and Prestatyn (16,246).

8B7. Given the distribution of the population at the 1981 census, it is estimated that between 1974 and 1984 the population increased by 4.7 per cent. While the population below working age fell by 13.3 per cent, those of working age increased by 19,200 (10.6 per cent). The number of persons of pensionable age also increased (by 10.2 per cent). Natural change has shown a small excess of births over deaths (400 between 1974 and 1984) but the major factor in the population increase has been inward migration which has been running at an annual average of 1,400 persons over the last ten years.

Table 1. Population - NE Wales

	1974	% of Total	1984	% of total
Under working age	76,200	24.4	66,100	20.2
Working age	180,900	57.8	200,100	61.1
Over working age	55,700	17.8	61,400	18.7
	-----	-----	-----	-----
	312,800	100	327,500	100

Table 2. Population change - NE Wales

Total Change	14.7%
Natural Change	0.4%
Balance (including migration)	14.3%

Income

8B8. The Second Periodic Report on the Regions of Europe shows that on the basis of a synthetic index measuring the relative intensity of regional problems in the Community a group of four Welsh counties (partly included in the profile area ie Clwyd, Dyfed, Gwynedd and Powys) are ranked 23rd in the Community out of 131 regional areas.

8B9. Table 3 below demonstrates that male average gross weekly earnings in the profile area have fallen below the GB figure since 1977 although they are consistently above the Welsh average. Little information is available on female rates, but the 1985 figure suggests that they are well below both the Wales and GB averages.

Table 3. Average Gross Weekly Earnings of full-time adults(a)
£ per week in April

	Males			Females		
	1977	1981	1985	1977	1981	1985
Clwyd East(b)	81.8	137.3	191.0	(c)	(c)	111.0
Wales	76.5	132.7	179.1	50.2	87.5	118.8
Great Britain	78.6	140.5	192.4	51.0	91.4	126.4

(a) Full-time men aged 21 and over and full-time women aged 18 and over (age at 1 January 1977 and 1 January 1981) and full-time men and women on adult rates for 1984, whose pay for the survey pay-period was not affected by absence.

(b) Clwyd East is the nearest approximation to the North East Wales area for which earnings figures are available.

(c) Results are only published for areas regularly represented by 100 or more people in the sample and where the standard error of average gross weekly earnings does not exceed 4.0 per cent of the average.

Source: New Earnings Surveys

Industrial Structure

8B10. The civilian working population of North East Wales was 134,200 in April 1981, 11.5 per cent of the Wales total. The overall total of employees in employment in the area fell slightly, mainly due to a dramatic fall of 8,800 in the numbers employed in metal manufacture. Smaller falls

of between 1,500 and 2,000 employees in the other manufacturing and construction industries have also nevertheless been significant . There was a substantial increase of 6,100 in the service sector, however, and a smaller, although proportionally large, gain of 2,500 in the engineering and allied industries.

8B11. By 1981, the area had approached closer to the Wales and GB employment distributions than was the case in 1977. The relatively very high proportion in metal manufacture had fallen and the engineering and allied industries and the service sector employment had risen, although still remaining well below GB levels.

Table 4 Industrial Structure

Total Percentage of Employees in Employment	NE Wales		GB	
	1977	1981	1977	1981
Agriculture, forestry and fishing	1.8	1.8	1.7	1.6
Mining and quarrying	2.1	2.2	1.6	1.6
Metal manufacture	13.8	4.8	2.2	1.5
Engineering and Allied industries	6.4	9.4	14.7	13.2
All other manufacturing	17.3	16.5	15.4	13.6
Construction	6.5	4.7	5.6	5.3
Gas, electricity and water	2.3	2.1	1.5	1.6
Service industries	49.1	58.1	57.3	61.4

Source: Censuses of employment (excludes self employed)

B. ECONOMIC AND SOCIAL ASSESSMENT

8B12. The fundamental problems of the area stem from its traditional weak industrial structure which has been dependent on a narrow industrial base in decline. The economic recession has accelerated the decline and undermined attempts to restructure and to diversify the local economy although there have been some notable successes. The problems are exacerbated by the area's position on the periphery of a generally depressed region, the north-west of England. The area is also affected by unemployment in the cross-border commuter communities which add to the severe problems caused by the decline of its own staple industries. The problems can be summarised as primarily:

- i. a narrow and weak employment base and lack of opportunity;
- ii. infrastructure inadequacies; and also,
- iii. social difficulties associated with the industrial heritage which add to the difficulty of attracting inward investment on the scale required.

Each of these is treated separately below.

i. Employment

8B13. The overall fall in employees in employment in North East Wales was about 4,000 or 4 per cent between 1977 and 1981 (see Table 5 below). There was, however, a dramatic change in the distribution of these employees among the various sectors. The metal manufacturing industries lost almost 9,000 out of 13,000 jobs (about two-thirds of the total), mainly as a result of the closure of the steel making part of the Shotton works. The 'other manufacturing' (especially textiles) and 'construction' industries also lost relatively large numbers of employees. Major gains did, however, appear in the service sector, where 9,000 more were employed in 1981 than in 1977 and 2,500 in 'engineering and allied industries' - an increase of 40 per cent. The move of employees into the service industries means that almost 60 per cent of all employees in employment are now in this sector, as compared with less than half only four years previously.

Table 5 Employment Structure

	Employees in Employment		% change
	Thousands 1977	1981	
Agriculture, forestry and fishing	2.3	2.1	- 12
Mining and quarrying	2.0	2.0	0
Metal manufacture	13.2	4.4	- 66
Engineering and Allied industries	6.1	8.6	+ 41
All other manufacturing	16.5	15.1	- 9
Construction	6.2	4.3	- 31
Gas, electricity and water	2.2	1.9	- 13
Service industries	46.9	53.0	+ 11
	95.5	91.3	- 4

Source: Censuses of employment (excludes self employed)

8B14. Since 1981 there have been further job losses in the traditional steel and textile industries, together with job losses at other individual major employers.

8B15. However, there have been offsetting job gains at newer plants which moved into the area or opened during the 1970s and earlier. Also, the area has continued to attract new manufacturing investment. Jobs gains at new manufacturing plants which have opened since May 1981 more than offset job opportunities lost as a result of complete manufacturing plant closures during this period: over 60 new manufacturing plants known to have opened since May 1981 now provide nearly 4,000 jobs. Job opportunities lost in the 30 manufacturing plants closed since 1981 total some 2,500. While the recent gains are encouraging, they have not, however, offset the major job losses of the period up to the 1980's. Furthermore job gains and job losses have not always balanced in individual areas within the profile area.

8B16. The latest available estimates indicate that manufacturing employment in the North East Wales area has been maintained at 1981 levels, and possibly with a slight increase.

8B17. The basic industries, which comprised a few very major manufacturing plants, no longer dominate and there is now a much more diversified and thus inherently more stable manufacturing sector. The twenty largest plants do provide some 50 per cent of all manufacturing job opportunities, but these plants are engaged in widely varying activities and include plants which opened during the 1960s, the 1970's and the 1980's. A further example of the extent of diversification is that in the Wrexham area 45 per cent of all manufacturing jobs are provided in 30 plants employing 100-499 employees and these plants represent a very wide range of industries. In the Wrexham area, around two thirds of all manufacturing employment is in the plants opened since 1966.

8B18. The steel industry, though still important is no longer the dominant industry and basic textiles is now a relatively unimportant employer. The Electrical and Electronic Engineering and Vehicles industries including aerospace, individually provide more jobs than the entire metals sectors - non-ferrous as well as ferrous.

8B19. There are some 42 manufacturing units, employing around 2,400 people, engaged in the textile and clothing industry in the county of Clwyd. In terms of units and current employment this represents 17.8 per cent and 15.8 per cent respectively of the totals involved in textiles and clothing in Wales. The majority of the manufacturing units, some 69 per cent, belong to the clothing sector, number about 29, and are basically cut, machine and trim operations. The remaining units, 13, belong to the textiles sector manufacturing a wide spectrum of products ranging from yarns, woollen and flannel, through carpets, household textiles, rope and twines. The textile industry in Clwyd suffered a major setback last summer with the closure of Courtaulds' plants at Greenfield and Wrexham, with the loss of over 1,100 jobs, representing approximately a third of those employed in the textiles and clothing sector in the county.

8B20. The relatively small coalfield in North East Wales has declined from 6 pits employing over 6,000 men in 1960 to 2 pits employing between them some 1,200 men. Bersham colliery (employing 475 at April 1986) is scheduled for closure in 1986 but Point of Ayr, where a £16 million investment is ongoing to construct a new surface drift and washery is thought to have a secure future.

8B21. In the rural area agriculture is the dominant industry focussing on small market towns. Policies to counteract the decline of population and employment have, however, favoured the building up of country towns, and providing assistance to remote rural areas, by the establishment of small manufacturing units and supporting forestry and tourism.

8B22. The industrial structure is now much more diversified and it is inherently more stable. Other important sectors in addition to electrical and electronic engineering, metals, vehicles and other transport, include Food, Drink and Tobacco, Non-metallic mineral products and the processing of rubber and plastics.

Activity Rates

8B23. North East Wales in 1981 had the highest male activity rate in Wales, although this was still almost 1 per cent less than the GB average. The female rate was 6.6 per cent below the GB figure and 1.1 per cent below the Welsh.

Unemployment

8B24. Unemployment levels in the two travel-to-work areas constituting North East Wales remain well in excess of the national level (35 per cent above in June 1985). Male unemployment, despite a slight improvement in the Wrexham area, was still over 20 per cent.

Table 6 Unemployment Rates

Travel to Work areas

	Total number	1983* Total %	Male %	Total number	1985 Total %	Male %
JUNE						
Shotton, Flint & Rhyl	11,969	17.6	20.5	12,243	18.1	20.8
Wrexham	7,968	17.6	21.3	7,736	17.1	19.9
DECEMBER						
Shotton, Flint & Rhyl	12,868	18.9	21.3	13,586	20.1	22.9
Wrexham	8,067	17.9	21.2	8,076	17.8	21.4

* Figures affected by statistical base change due to 1983 Budget measures

8B25. The June 1983 and 1985 figures for unemployment for North East Wales show seasonal decreases, the rates in these months being 1-2 per cent lower than in December 1983 and 1985.

ii. Infrastructure

8B26. Ultimately, the full potential of direct measures to tackle the basic economic problems will not be realised without complementary efforts to upgrade communications, fuel, power, water and sewerage which directly support industrial activity and to reclaim derelict land for development (as was necessary, for example, for the Delyn Enterprise Zone). The main problems are outlined below.

Communications

8B27. The area is located relatively near to the motorway network in North West England and the West Midlands but there is a need for the improvement of cross border links to increase the attractions of the area for new industry. The most important cross routes are the A55(T), A5(T)

and A494T-A550(T)-A5117(T)-M56, and the A525, the A483(T) and the A534 which provide links to the English road network. The A548 serves the coastal strip at Deeside including Rhyl, Flint, Connah's Quay and Shotton. The County Council have proposals to provide a new crossing of the Dee Estuary.

8B28. The Holyhead/Chester railway line, which is particularly heavily used by tourists during the summer, links the area to Manchester and London and to the North Wales Coastal towns. The North Wales line is signalled throughout by manual signal boxes and semaphore signalling. This means that services have to operate at speeds well below their full potential. British Rail are working on a programme of engineering improvements to increase the maximum potential speed of the line.

8B29. British Rail propose to single the line between Wrexham and Chester early in 1986. The dual track is in poor condition and British Rail consider that the singling and upgrading of the line should result in a better service. The villages north of Wrexham are served by a branch line linking Wrexham with the Wirral. Clwyd County Council provides financial assistance for these services.

Other Services

8B30. Water supplies have been well maintained, although the demand, particularly for industrial services, has been considerable. However, the problems caused by the closure of major water-using industries such as steel and their partial replacement by light industries and new industrial developments has brought particular difficulties in re-orientating water and sewerage services. Inadequate water supplies at certain locations have constrained industrial development. The changing structure of the economy has resulted also in a shift in the demand for electricity and gas supplies require reinforcement.

8B31. Welsh waste disposal activities are on a small scale and individual district councils are finding increasingly that new sites are difficult to find and expensive to develop to basic standards of pollution control and amenity protection. Local Authority waste disposal sites could, in certain circumstances, with the agreement of the Water Authorities, be adapted to receive a wide range of waste, including

industrial wastes. It is now generally recognised that such facilities are an essential support for industry.

iii. **Social**

8B32. In addition to the problems of industrial structure and infrastructure described, poor social infrastructure in the area and an unsightly environment scarred by industrial dereliction around Wrexham and on Deeside, can affect the level of inward investment. For example the area, particularly in the industrial east, includes high proportions of outdated schools and an ageing housing stock (28 per cent of the housing stock was built before 1919), both are problems in their own right and serve to reinforce the poor external perception of the area. In addition, a decaying physical environment, coupled with the effects of high and long term unemployment, only serves to lower morale. In the rural area the problems differ, but are nevertheless real, with the contraction of agricultural employment and the difficulty of access to alternative employment and strains imposed on the public transport facilities arising from dispersal of the population.

C. **PROSPECTS**

8B33. It is estimated that the population of Clwyd will increase by 9,800 (2.5 per cent) between 1984 and 1991; the population of working age is projected to increase by 9,200 (3.8 per cent) between 1984 and 1991 with consequent implications for the additional employment opportunities which must be created to prevent the numbers unemployed - already unacceptably high due to past major job losses - rising further. There are likely to be further job losses in the area though not on the scale of recent years, which have seen redundancies in the declining industries such as steel and textiles.

8B34. If the area is to overcome these problems, the present steady development of new industries and trends towards diversification must be strengthened and promoted. Particular areas of potential growth are the high tech and tourism industries. Construction work has started on a £16 million coal liquefaction pilot plant to convert 2½ tonnes of coal per day into oil at the Point of Ayr colliery site. The pilot plant is expected to create some 200 jobs during the construction stage and 80 during the operation stage.

8B35. The projected increase in population, particularly in the numbers over retirement age, falling educational rolls and the need to retrain those made redundant from the declining industries will make new demands on the social and community services.

SECTION 2 - DEVELOPMENT OBJECTIVES

8B36. It is of critical importance in the face of recent job losses and projected population changes that the long-term objectives are maintained. The overall objective is to continue to encourage economic growth and regeneration and the diversification of the industrial and economic base and thereby to reduce the high unemployment in the area. The specific objectives are:

A. ECONOMIC

- i. to encourage the growth of employment opportunities in order to reduce unemployment and to keep pace with population growth by improving efficiency, stimulating indigenous industry and by the attraction of mobile industrial projects;
- ii. to provide an adequate supply and range of factory space, particularly for small and medium enterprises, on industrial estates and also on land reclaimed from past industrial activity involving both new build and the conversion and upgrading of older buildings;
- iii. to continue the efforts made to diversify the economy and to encourage the introduction and adoption of new technology;
- iv. to encourage the formation, consolidation and expansion of existing, particularly small firms and the development of new businesses;
- v. to continue efforts to improve and strengthen the area's economic and commercial centres;
- vi. to teach and improve skills through the continued use of manpower training programmes, especially vocational training for school leavers and the unemployed;

vii. to develop tourism by the consolidation and expansion of the existing market and the upgrading of facilities throughout the area but particularly through the provision of improved and additional tourist facilities designed to broaden the appeal of the area as a whole and to extend the basically short season.

B. DIRECT INFRASTRUCTURE

i. to raise the standard of internal communications and communications with other areas of the UK to both east and west, in particular to provide good trunk road links from north Wales to the national motorway network;

ii. to reduce travel costs for commercial, tourist and residential traffic by upgrading road links to the trunk roads, especially links from existing and proposed industrial sites;

iii. to improve traffic flows in communities and to relieve congestion on the more important routes;

iv. to maintain a basic public transport system to keep pace with changing industrial structure and to serve both the rural and tourist areas and the industrial estates;

v. to upgrade the standard of all aspects of the direct infrastructure support - water, sewerage, waste disposal and the utilities - particularly to the industrial areas.

C. SOCIAL INFRASTRUCTURE

to provide adequate social conditions in which the development of industry can flourish and to improve the quality of life in the area and enhance the area's image by developing and adapting all aspects of the social infrastructure.

SECTION 3 - DEVELOPMENT MEASURES

8B37. The measures outlined illustrate the continuing work being undertaken in a bid to meet the objectives for the economic development of

North East Wales. European grant aid has been of considerable benefit in developing the infrastructure, industry and resources of the area. A list of major schemes which have been assisted under the ERDF in recent years is at Appendix 1.

8B38. Amongst the schemes to benefit are a wide range of infrastructure measures including major improvements to the access of industrial sites to the national motorway network as well as the servicing of major industrial estates, such as the Deeside Industrial Park. Such infrastructural measures have, however, gone hand in hand with other measures of support designed to further the generation of small businesses and the area has made ample use of the £4.5 million in EC Non-Quota aid made available for this purpose under EC Regulations 2616/80 and 216/84. Workshop complexes have been created from redundant factory buildings, for example at Wrexham, and demand has also been high for the aid which can be made available towards small business and consultancy services under the Business Improvement Scheme, which operates with Non-Quota support.

A. ECONOMIC

Financial Assistance

8B39. Financial assistance to industry continues to be important, in order to encourage the expansion of existing industry, the growth of the small business sector and to attract mobile industrial projects. Direct financial assistance is made available by Central Government through the availability of Regional Development Grants and Regional Selective Assistance. In 1983/84 and 1984/85 payments of old-style Regional Development Grants of £25,000 and over in North East Wales had a total value of over £36.6 million. Offers of Regional Selective Assistance accepted in 1983/84 and 1984/85 totalled some £19 million.

8B40. In addition, agencies in the area such as the Welsh Development Agency and the Wales Tourist Board, and also local authorities stimulate industry by the provision of equity capital, loans, grants and promotional work. The development of existing and intending small businesses is further stimulated by the ready provision of advice and information particularly by the WDA's Business Development Unit, the Small Firms Service, which is administered by the WDA in association with the

Department of Employment and by the local authorities. The Urban Programme and Urban Development Grant scheme also provide financial assistance for economic schemes by means of a 75 per cent grant from Central Government to local authorities. For 1986/87 those schemes which are directed towards economic and social regeneration, especially those encouraging the creation of small business ventures and jobs, have been particularly favoured. £1.9 million has been allocated under the Urban Programme to economic schemes in the area in 1986/87. Since the introduction in 1982 of the Urban Development Grant scheme, grants totalling over £1.7 million have been awarded to local authorities in the area to help them bring forward economic and social projects.

8B41. Its strong association with steel making means that the area has gained considerable benefits from the ECSC, loans to companies employing ex-steel workers and various grants to redundant steel workers. Other major sources of investment in the area include the EIB, which has lent to industrial and infrastructure works in the area and the ERDF which has provided some £55 million in commitment for industrial and infrastructural schemes as well as a further £4.5 million for the development of special remedial programmes under the steel rundown measures introduced in Regulation 2616/80 and supplemented by Regulations 216/84. The area has also gained considerable assistance from supplementary measures, the ESF and FIDOGA. An indicative list of schemes benefitting in recent years from ERDF assistance is at Appendix 1.

Industrial Sites/Factory Building

8B42. The WDA, the County Council, and the District Councils have all been active in providing and upgrading premises for industrial use in the area. The County Council is undertaking two major schemes and several minor ones. The redevelopment of the former Shotton Steelworks area, in conjunction with the WDA, BSC and other agencies has already permitted new enterprises -- notably a paper mill -- to set up. In addition, Newtech, an innovation centre part-financed by the EEC, has been established to provide technical assistance to, and starter premises for innovatory businesses. In the Alyn and Deeside District there are over 400 hectares of land allocated for new industrial development, with large sites at the former Shotton Steelworks site and the Deeside Industrial Park. Delyn Borough Council are concentrating on the development of the Enterprise Zone and the

former Courtaulds Factory site at Greenfields, along with the conversion of terraced cottages into craft workshops at Holywell and Bagillt with ERDF assistance. The Borough Council are also developing a site at Nercwys Road, Mold for new development.

8B43. In recent years Wrexham Maelor Borough Council have redeveloped the Whitegate complex with support towards both infrastructure works and provision/refurbishment of industrial units from ERDF and the Urban Programme. The Council's industrial development programme now revolves around the acquisition of the former British Tissues Factory complex and the former Courtaulds Factory site, to be known as the Redwither Industrial estate. An existing building of some 20,000 sq feet on the British Tissues site will be converted into Starter Units, and following the demolition of some minor buildings Nursery Factory Units will be erected. Phase II of the scheme provides for refurbishment of two older large units to meet the requirements of the medium to large industrial user.

8B44. Also in Wrexham, Clwyd County Council is undertaking the refurbishment of Croesnewydd Hall to be used as a medical technology and business development centre in a new Technology Park whose emphasis will be on the production of hi-tech components for use in the nearby new district hospital and other medical establishments.

8B45. On a smaller scale, the County Council plans to expand its 'Pinfold' Developments, possibly adjacent to the present site in Buckley. It will be carrying out environmental landscaping, and tidying up its existing sites in the Wrexham area. During the programme period it is also likely that the local authorities will be called upon to make a contribution to expanding the workshop provision for industrial development in the coastal area such as the Kinmel Park Industrial Estate, in rural areas, and adjacent to the Newtech buildings as that project develops.

8B46. In addition to the development of its own principal industrial estates in the area - at Wrexham, Shotton (the Deeside Industrial Park which is now undergoing a 300 acre extension) and Sandycroft - the Welsh Development Agency has worked in conjunction with the local authorities to develop a number of smaller sites for industry in the main towns, such as Flint, Mold and Rhyl. These, it is hoped, will stimulate the development of small locally based industry and encourage inward investment.

Aid to Areas Affected by Industrial Rationalisation

8B47. In addition to over £30 million (since 1982) of grant aid allocated to industrial land preparation schemes in the area from the quota side of the ERDF, the area is also designated a steel-closure area under the ERDF non-quota regulation. Receipts from this source which amount to £4.5 million over the period 1980-89 will boost efforts to encourage the growth and development of small and medium sized enterprises as part of the effort to revitalise the area following the decline in steel making. The ERDF has also financed the Business Improvement Services Scheme which since November 1984 has provided assistance to small firms to help with the cost of buying in consultancy advice in specialist areas such as finance and marketing; of obtaining common services; of developing new products and processes and of purchasing fixed assets. Of the 250 applications received by February 1986 over 150 have been approved offering grants to small firms totalling £850,000.

8B48. In November 1982 the town of Flint was chosen as the location for Wales' second Enterprise Zone. The Enterprise Zone concept is an experimental scheme designed to generate self-sustaining economic activity in an area of both physical and economic decay. The measures utilised are a range of financial incentives coupled with a more relaxed planning regime and speedier handling of the remaining controls. The Delyn zone was designated on 21 July 1983 and covers an area of more than 260 acres. Former textile mills have now been largely cleared and a substantial infrastructure programme, including new factory development is substantially complete. At 21 October 1985, 129 acres of land had been developed, 79 firms were on site and 1,451 jobs were in existence.

8B49. New industrial building and site development at the Deeside Industrial Estate to which ERDF aid of over £2.7 million has been committed, allied to the clearance of the former Shotton Steelworks buildings with cooperation between BSC, the WDA, the District Council and the Deeside Enterprise Trust has led to the ongoing comprehensive development of the whole area around the steelworks site and the Deeside Industrial Park for new industrial and highway development. The Deeside Enterprise Trust has taken over BSC (Industry) Ltd's job creation activities, with funds from BSC (Industry), the private sector, local authorities and central government through the Urban Aid programme. The

Trust is responsible for a range of initiative including the provision of industrial premises on the Deeside Industrial Park to assist the restructuring of the local economy in the light of job losses in steel and other industries and particular attention will be paid to small firms. The Trust estimates that up to 31 March 1985 it had helped to create nearly 2,800 jobs.

8B50. The Enterprise Trust concept is being developed elsewhere in the area. Further north the Delyn Business Partnership has been in operation since 1982. It is supported by a wide variety of concerns, including Delyn District Council, the WDA, large and small businesses (including Courtaulds PLC) and local banks. The Partnership estimates that since it was formed it has assisted some 60 businesses to set up operations. In the rural western and southern parts of Clwyd, the County Council has, with support from the District Councils, local industry and a major bank, set up the "Clwydfro" Enterprise Trust to assist with advice on all aspects of small business development in the area, and in certain circumstances, to provide financial help.

Land Reclamation

8B51. The work of the WDA, in cooperation with the County Council and District Councils, in clearing away the dereliction caused by past industrial activities - especially mining - has been valuable in this area. In the period 1976-1985 the WDA approved the reclamation of 133 hectares of derelict land at a cost of £8.8 million. The Agency's latest land reclamation programme includes 24 schemes in the area to reclaim 284 hectares at an estimated cost of £9.9 million. A major project in the programme is a £4 million scheme to reclaim 150 hectares of the cleared Shotton steelworks site to provide land for specialist process industry alongside Deeside Industrial Park. Other projects include the redevelopment of the sites of the former Courtaulds factories at Greenfield and Wrexham, the former British Tissues and Firestone factories at Wrexham, and continuing improvements to, and rationalisation of, the older industrial estates. Extensive public investment of over £1 million has recently taken place in the Delyn Enterprise Zone, mostly concentrated on refurbishment of some existing buildings and in new construction. The former colliery site at Gresford was reclaimed, with the aid of the Welsh Development Agency, to provide factory units for three major industries.

Small Business Development

8B52. In addition to the services provided by the Welsh Development Agency's Business Development Unit and the Small Firms Service, which is administered by the WDA in association with the Department of Employment, the local authorities continue to be active in providing premises and support services for new industrial development. Clwyd County Council has undertaken several projects to provide premises and support services for new businesses. Two 'Pinfold' estates for small businesses are already operational at Buckley and Rhyl, and a third is planned. The Newtech site, with its range of technical and advisory backup will provide a centre for the trying out of new business ideas and products. The Greenfield Valley Development, in association with Delyn Borough Council, may require further inputs of premises and services. Alyn and Deeside District Council has erected 30 small industrial units to encourage small businesses. Delyn Borough Council has provided 11 small units for small businesses within the Delyn Enterprise Zone and has plans to provide an additional 39 at the former Courtaulds site at Greenfield. This local authority is also converting 6 former terraced cottages into craft workshops within Holywell, and a further 7 within Bagillt and has identified other redundant buildings which can be converted into small manufacturing units. Wrexham Maelor Borough Council intends to erect Nursery Factory units at the site of the former British Tissues factory, and to convert an existing building of some 20,000 sq ft into Starter Units.

8B53. In the rural and coastal areas priorities include the provision of small workshops for craft industries and the extension of the tourist season to provide spin-off employment of a less seasonal nature.

Tourism

8B54. The local authorities and Wales Tourist Board are keen to develop tourism in North East Wales, which has been identified as a major potential growth area, by exploiting both the natural and man-made attractions of the area and by extending the tourist season. In recent years EEC funding has been applied to several schemes to expand tourist amenities in Clwyd, including the Rhyl Suncentre, a multi-purpose complex at Morfa Hall, a craft centre in Ruthin, and a leisure centre in Colwyn (the latter two now outside the profile area). A number of studies have also been undertaken,

with ERDF aid, into the potential for the development of a co-ordinated tourism policy for areas such as Colwyn and Holywell.

8B55. Rhuddlan Borough Council plan to construct an all-weather tourist complex at Prestatyn, the Royal Lido, which will employ some 50 staff and will trade for twelve months of the year. This project will complement the Rhyl Suncentre, which has gradually lengthened its trading period and now opens from mid-March to mid-November creating some 200 jobs. The Suncentre has attracted almost £0.7 million in ERDF assistance.

8B56. During the programme period, Colwyn Borough Council intend to commence a recreational project at Plas Llwyd, Towyn, and a tourism and leisure complex at Tir Prince, also at Towyn.

8B57. Delyn Borough Council is currently constructing a new leisure and tourism complex at Holywell which will provide indoor facilities for visitors on an all-year round basis. This provision is seen as the first stage of an integrated programme to develop Holywell as an inland Visitor Centre as identified in the Validation Study recently concluded and funded with ERDF aid. This study confirmed the tourism potential interest in Holywell and the Greenfield Valley. Another major project is the development of Bodelwyddan Castle, near Rhyl, as an arts, culture and recreation centre, including a Portrait Gallery, a gallery of contemporary arts, an exhibition and conference facility, with various outdoor leisure activities for the tourist visitor. The Queensway Sports Track is a major recreational scheme currently being undertaken at Wrexham. The track, which is adjacent to the existing leisure centre, will be of a standard adequate to host national, if not international, events.

8B58. In rural areas there are plans to expand the attractions at Loggerheads Country Park, in Ewloe, and in Chirk. Also inland is the ongoing development of the European Centre of Folk Studies in Llangollen, and the enhancement of the area's tourist potential through improving the attractions of the Trevor Basin, on the Llangollen Canal. There have been plans for a marina development at Rhyl for a number of years, and this could be supplemented by adjacent hotel construction. In fact the profile area is lacking in major hotel facilities, and there is scope for a hotel and conference centre in the county.

Training

8B59. Training of the workforce by industry is supplemented by Central and local government. The training and vocational education programmes provided by the Manpower Services Commission is now more flexible and more responsive to the changing needs of industry. There has been a move away from long duration, Skillcentre based training for unemployed people. The MSC is acting more as a catalyst providing direct pump priming support to industry, including small businesses, both on employer premises and at local institutes of further and higher education. Local authorities complement such training by acting as YTS managing agents and as sponsors of Community Programme schemes. The North East Wales Institute of Higher Education at Kelsterton is active in microtechnology, operating its own manufacturing company, microprocessor and training laboratories. Information Technology Centres covering the Vale of Clwyd, Deeside and Wrexham offer training in technological skills to young unemployed people in the area. Wrexham Borough Council has applied for assistance from the ESF to establish a Media Centre and a New Technology Centre in Wrexham.

8B60. Clwyd was chosen as one of the first phase of 10 pilot study regions for the MSC Technical and Vocational Education Initiative (TVEI) to provide more technical and vocational emphasis in the education of 14-18 year olds in 5 secondary schools. The scheme, which commenced in September 1983, will cost about £3.5 million over a 5 year period. The County Council has now extended the scheme to provide TVEI personnel and hardware in each secondary school in the county, and has assisted with the TVEI Centre at Bodelwyddan Castle.

8B61. Technical Training in a work oriented environment has been promoted in a variety of schemes, many of which have sought the involvement of ESF Finance. Among these is the Greenfield Valley scheme for encouraging young unemployed persons to set up in business operated by Clwyd County Council and Delyn Borough Council; the Newtech Innovation Centre in Deeside; the electronics technician's project in Wrexham; and the CREU training project for training of agents for small business promotion in the rural areas at Llysfasi. In addition, NEWI has implemented various high technology programmes including an innovatory business training programme which is of use to the Greenfield Valley scheme, and may have applications nationally.

Natural Resources

8B62. Public investment in the Shotton Paper Mill has helped to alleviate the effects of the steel redundancies in the Shotton area. At the present time the mill is employing 215 persons and this figure is expected to reach 275 in the near future. The mill, which was officially opened in November 1985, will provide an important outlet for the Forestry Industry. It has been estimated that when the mill eventually achieves full production capacity a further 850 jobs in supply and ancillary activities will have been created. The mill will use substantial amounts of otherwise unusable small roundwood, providing employment opportunities over a wide area of Wales covering the home forests. There will, therefore, be multiple benefits which will accrue largely within North East Wales but also within rural parts of Wales which are dependent on agriculture and tourism - principally the Mid Wales Aided Area. Thus the Shotton Paper Mill project is judged to be an important development locally and in regional terms.

B. DIRECT INFRASTRUCTURE

Road Communications

8B63. The major trunk road improvement underway is the upgrading of the A55(T) to dual carriageway standard across the profile area. The construction of by-passes for Holywell, and Bodelwyddan is presently underway and by 1990 it is planned to make a start on the Travellers Inn Improvement, the Northop By-Pass and the Rhualt Hill Improvement. This route is important to both North East and North West Wales and improved access will help stimulate the growth of tourism and industry in areas of high unemployment.

8B64. The County Council's programme of major schemes includes proposals to construct a road bridge over the Wrexham-Bidston Railway Line to improve access to land to be developed for industry; this new road bridge could form part of the Shotton-Connah's Quay By-Pass should the County Council proceed with proposals for a Dee Crossing; also improvements to the A548 route between Greenfield and Ffynnongroew, and the construction of a Flint By-Pass. Further improvements are programmed on the A541 at Caergwrlle and at Gwersyllt; the Pennyffordd By-Pass on the A550 should be completed.

8B65. With the upgrading of the A55(T) there is a need to upgrade the links between it and major industrial and population centres (including the Delyn Enterprise Zone), and the A548. Proposals in the Wrexham area involve the completion of the A483(T) upgrading to the north and south of the Wrexham Ring Road - the Ruabon By-Pass is presently under construction and by 1990 work is expected to be underway on by-passes for Gresford-Pulford, Newbridge and Chirk. Clwyd County Council have proposals to improve the A525, to construct a Wrexham Inner Ring Road and to carry out major improvements on the Wrexham Industrial Estate. The County Council is also continuing its programme of smaller industrial access roads; including links to the quarrying and agricultural areas.

Rail Communications

8B66. The North Wales railway line is of considerable importance not only in the area but also in neighbouring North West Wales. British Rail hope to more fully exploit the capabilities of the locomotives used on the line by progressively replacing the present signalling and upgrading the track's speed capabilities.

8B67. The British Railways Board are planning three large projects for the profile area within the programme period with an estimated cost of over £1 million. The modernisation of the track, level crossings and signalling between Wrexham and Chester is currently underway in order to provide a more cost-effective and efficient rail service, and to facilitate the constructions of the Gresford-Pulford By-pass road. They intend to provide new passenger and parcel facilities at Wrexham General station to improve the service offered to local passengers and businesses. In order to allow better utilisation of the track around Rhyl, and to improve traffic flows to Ireland, the Board intend to modernise the track and signalling.

8B68. In addition to these schemes, there is a need to improve rail links between the profile area and the rest of the country. This involves upgrading the railway stock, track, signalling and main-line station services, as well as improving the frequency of direct links between the region and major population centres in England. The improvements are needed, both on the North Wales Coast Line and on the services to Wrexham. For freight traffic, Clwyd County Council foresees the need for a road/rail freight interchange in the Wrexham area as a joint public/private sector initiative.

Support Services

8B69. The local Electricity Board (MANWEB) has a programme underway, estimated to cost £7.5 million during the programme period, to provide electricity mains and services for the new developments and to reinforce the networks where the existing arrangements are inadequate to meet the new load. In North East Wales the main schemes undertaken with ERDF support at the Wrexham, Deeside and Sandycroft industrial estates and at Bromfield, Mold are nearing completion. Further schemes are underway or proposed at the Llay, Flint and Deeside/Connah's Quay industrial estates. Re-inforcement of gas supplies throughout North Wales continues. In the programme period a re-inforcement project (Maelor to Brymbo) is planned with an estimated cost of £3 million. The scheme is designed to improve supplies in the Wrexham ring main system. Pressure reduction station work at Rhos, St Asaph and Sealand Village is planned for the programme period. Other major projects in north east Wales are envisaged but fall outside the profile area.

8B70. A water and sewerage treatment investment programme with a total cost of about £12 million is planned for North East Wales for the programme period. Supply improvements will cater for industrial and tourism demand including projects at Llwyn On, the Glascoed Service Area and St Asaph; projects at the Glascoed and Pendinas Waterworks will improve water treatment to EEC standard; and a number of projects to improve sewerage and sewage disposal arrangements are planned at a variety of locations to keep pace with industrial and tourism demand and to improve beaches.

C. SOCIAL INFRASTRUCTURE

8B71. Priority must be given also to social infrastructure, of particular relevance in this area with its inheritance of industrial dereliction and changing structure. The land reclamation measures discussed at paragraph 8B50 not only provide valuable industrial sites but also provide an enhanced environment in which industrialists are more prepared to establish. Some progress to improve the social infrastructure has been made but further investment will be required if much needed new industry is to be successfully attracted to the area. Major expenditure on new hospitals at Mold, Bodelwyddan and Wrexham have assisted in upgrading the profile area's health facilities and the Deeside Community Hospital is

planned for a start in the programme period. The urban programme is contributing a total of 2.5 million to new and ongoing schemes in the area in 1986/87 of which over 0.6 million is for social schemes. Significant private sector input into the renewal of run-down urban areas has been generated as a result of the Urban Development Grant scheme launched in April 1982.

8B72. Appendix 2 tabulates some of the main projects being undertaken in NE Wales during the programme period in order to further the objectives outlined in Section 2. The list gives some indication of current projections and priorities but is by no means exhaustive.

SECTION 4 - IMPLEMENTATION AND CO-ORDINATION OF INVESTMENT

Financial Resources

8B73. The following estimates of capital expenditure in the Profile Area over the programme period are based upon project costs as identified by the local authorities and public bodies which contributed to the compilation of the programme. Practical considerations preclude the preparation of accurate estimates for every project listed in the Appendix and the totals are therefore indicative only.

	1986-87 m	1987-88 m	1988-89 m	1989-90 m
Factory building, site development and land reclamation	6.0	6.3	5.3	4.9
Tourism	5.0	5.0	4.3	3.6
Roads	25.9	21.2	24.1	16.2
Rail	1.0	0	0.2	0
Water, sewerage and flood protection	3.2	3.6	3.1	3.6
Electricity	2.4	2.4	2.4	2.4
Gas	0.8	0.8	0.8	0.8

Notes: Factory building, site development and land reclamation - excludes expenditure by Welsh Development Agency

Tourism - excludes Wales Tourist Board Grant

Roads - estimated expenditure on trunk roads, and on county roads over 5 million. Estimates provided by Welsh Office.

Coordination of Investment

8B74. The major planning document for development and other land use in the sub-region until 1991 is the Clwyd County Structure Plan, approved by the Secretary of State for Wales. The plan is presently undergoing a mid-term review with the aim of rolling it forward to 1996. Local plans, prepared by District Councils, conform with the Structure Plan.

8B75. A study into the potential application of an EC "integrated operation" in the County of Clwyd has been conducted by independent consultants, operating on behalf of the County Council and the European Commission. In the light of this the County Council together with several district councils are considering the possibility of preparing a National programme of Community Interest.

8B76. The North Wales Tourism Council assists with the co-ordination of public and private sector tourism marketing and development. Its membership includes local authority and trade representatives.

8B77. The key to the recovery of the economy of North East Wales, and the provision of the large numbers of new jobs required lies in the need to stimulate industrial growth through encouragement of the growth of local businesses and inward investment, particularly in the new technology industries. Priority is being given to the advance factory building programmes in the Delyn, Deeside and Wrexham areas and the general infrastructure of the whole profile area. Further attention in particular will be related to the needs of the Shotton and Wrexham areas and the Delyn Enterprise Zone.

ERDF AID TO NORTH EAST WALES

Indicative projects which have received aid in recent years (Para 8B36 refers)

Authority	Project	Eligible Cost £	Grant Commitment £
Industrial Development			
BSC (Industry) Ltd	Deeside Industrial Park	2,582,944	774,883
BSC (Industry) Ltd	Deeside Industrial Park Ph6 Infrastructure	1,085,000	325,500
Clwyd CC	NEWTECH Deeside Industrial Park	1,679,000	503,700
Clwyd CC	Deeside Industrial Estate, Level crossing	268,000	134,000
Delyn BC - EZ	Castle Park Infrastructure Ph 2	460,000	230,000
Delyn BC - EZ	Aber Industrial Estate Infrastructure Ph 5	250,000	125,000
Clwyd CC	Kinmel Bay Highways depot	825,000	412,500
Clwyd CC	Wrexham Tech Park, Infrastructure	1,510,000	755,000
Road communications			
Clwyd CC	Dee Crossing Feasibility Study	669,000	334,500
Clwyd CC	Dee Crossing Technical Study	419,000	209,500
Clwyd CC	A550 Improvement at Hawarden	398,050	119,415
Clwyd CC	A548 Flint reconstruction	370,490	111,147
Clwyd CC	A541 Rhyd-y-Goleu Bridge improvement	1,184,500	355,350
Clwyd CC	C107 Mold-Nercwys-Eryrys Ph 1	441,681	132,504
Clwyd CC	A5026 Holywell Inner Ring Road	1,332,800	666,400
Clwyd CC	B5123 Parc Bychan to Jerusalem	487,050	243,525
Clwyd CC	C107 Mold-Nercwys-Eryrys Ph 2	340,600	170,300
Clwyd CC	A541 By-pass improvements	2,044,000	613,200
Clwyd CC	A541 Westminster Bridge, Wrexham	2,383,000	714,900
Clwyd CC	A541 Westminster Bridge, Wrexham	339,000	101,700
Clwyd CC	Wrexham Inner Ring Road	580,000	290,000

Authority	Project	Eligible Cost £	Grant Commitment £
Road Communications (Cont'd)			
Clwyd CC	Holt/Farndon By-pass	5,099,800	2,549,900
Clwyd CC	A5101 Brymbo Link road	4,210,550	2,105,275
Welsh Office	A483 Ruabon By-pass	14,895,673	7,447,836
Tourism			
Clwyd CC	Morfa Hall Centre, Rhyl	873,500	262,050
Public Utilities			
MANWEB	Deeside Industrial Estate electricity supply	1,143,872	343,161
Welsh Water Authority	Prenbrigog Service Reservoir	452,000	135,600
Welsh Water Authority	Buckley area improvements	405,198	202,599
MANWEB	North East Wales, Telecontrol System	522,000	156,600
Wales Gas	Reinforcement gas supplies to Mold	361,000	108,300
Wales Gas - EZ	Supplies to Flint Enterprise Zone	693,000	346,500
Welsh Water Authority	Aston-Bryn Edwin Water Supply	764,000	229,200
Welsh Water Authority	Bryn Edwin - Flint trunk main	383,000	114,900
Wales Gas	Bodelwyddan Reinforcement	348,822	104,646
MANWEB	Supplies to Llay Industrial Estate	535,652	267,826
Welsh Water Authority	Five Fords sewage treatment extension	2,068,000	620,400

NORTH EAST WALES INDICATIVE MAJOR INFRASTRUCTURE DEVELOPMENTS 1986-90
(PARAGRAPH 8B71 REFERS)

Scheme	1986/7	1987/8	1988/9	1989/90
Trunk Roads				
A55 Bodelwyddan By-Pass	-----	Complete		
A483 Ruabon By-Pass and Wynnstay Link	-----	Complete		
A483 Gresford-Pulford By-Pass		Start	-----	
A483 Newbridge By-Pass and Whitehurst Link		Start	-----	
A483 Chirk By-Pass			Start	-----
A55 Holywell By-Pass		Complete		
A55 Northop By-Pass		Start	-----	
A494 Mold By-Pass			Start	-----
A55 Travellers Inn improvement		Start	-----	
Principal Roads				
A525 Machwiel By-Pass	Start	-----		
A525 Rhuddlan Road			Start	-----
A534 Dualling Llanpwll to Holt and Hugmore Lane	Start	-----		
A541 Caergwrle By-Pass	Start	-----		
A541 Gwersyllt			Start	-----
A547 Borth Crossroads				Start
A548 Shotton-Connah's Quay By-Pass Railway Bridge	Start	-----		
A548 Flint By-Pass	Start	-----		
A548 Greenfield to Ffynon-Groeuw			Start	-----
A550 Penyfford By-Pass	Start	-----	Complete	
Other Roads				
B5121 Bryn Celyn Junction, Holywell	Start	-----	Complete	
Mold-Nercwys-Erryrys Quarry Road Stage 3	Start	-----		Complete
Plough Lane Link Road, Shotton			Start	-----
Wrexham Industrial Estate: internal ring/spine road cross lanes		Start	-----	
Hugmore Lane improvement	Start	-----		
Ffordd Llanarth Link Road	Start	-----	Complete	
Buckley Town Centre Link Road	Start	-----		
River Lane Extension to Flint Road, Saltney				Start
Pickhill Halt Bridge Improvements	Start	-----	Complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments				
Wrexham Technology Park	Start			Complete
Shotton New Development Zone	Start			
Pinfold Developments		Start		
Firestone Reclamation	Start			
Clwyd Industrial Estates Improvements	Ongoing			
Drury Lane, Buckley, Industrial Estate	Start			
Sealand Avenue, Garden City				
Small Industrial Units, (Phase 3)	Start			Complete
Buckley, Redevelopment of Standard Works	Start			
Dock Road Industrial Estate, (extension and improvements)		Start		
Queensferry, Redevelopment of Old Tar Works,		Start		
Shotton, Rehabilitation of building to provide training workshops		Start		
Saltney, Reclamation and redevelopment of derelict and contaminated land,		Start		
Redevelopment of Connah's Quay Power Station Site, Feasibility Study	Start			Complete
Connah's Quay Dock Reclamation Scheme (Phase 2)	Start			Complete
Redevelopment of Connah's Quay Power Station Site		Start		
Connah's Quay/Shotton Town Centre Study	Start			Complete
Connah's Quay/Shotton Town Centre, Infrastructure Redevelopment Schemes		Start		
Buckley, Development of Former Waste Disposal Sites		Start		
Redwither Site, redevelopment and refurbishment				Complete
Gresford Industrial Estate, infrastructure works	Complete			
Croesfoel, Rhostyllen, infrastructure works	Complete			
Wynnstay, Infrastructure Works	Complete			
Llay Industrial Estate, further extension of infrastructure works	Start			Complete
Cefn Mawr, Former Gas Works Site infrastructure works	Complete			
Land Reclamation: Wrexham to Abenbury railway line	Complete			
Delyn Enterprise Zone, infrastructure works, industrial expansion, refurbishment and landscaping		Complete		
Ex Courtaulds site Greenfield: Plant 1 and 2 infrastructure works, industrial expansion, refurbishment and landscaping	Start			Complete
Land reclamation, various toxic sites (including Castle Works toxic site in Enterprise Zone)	Start			Complete
Greenfield Business Park, reinforcement of gas supplies: Phase 1	Complete			
Phase 2			Complete	

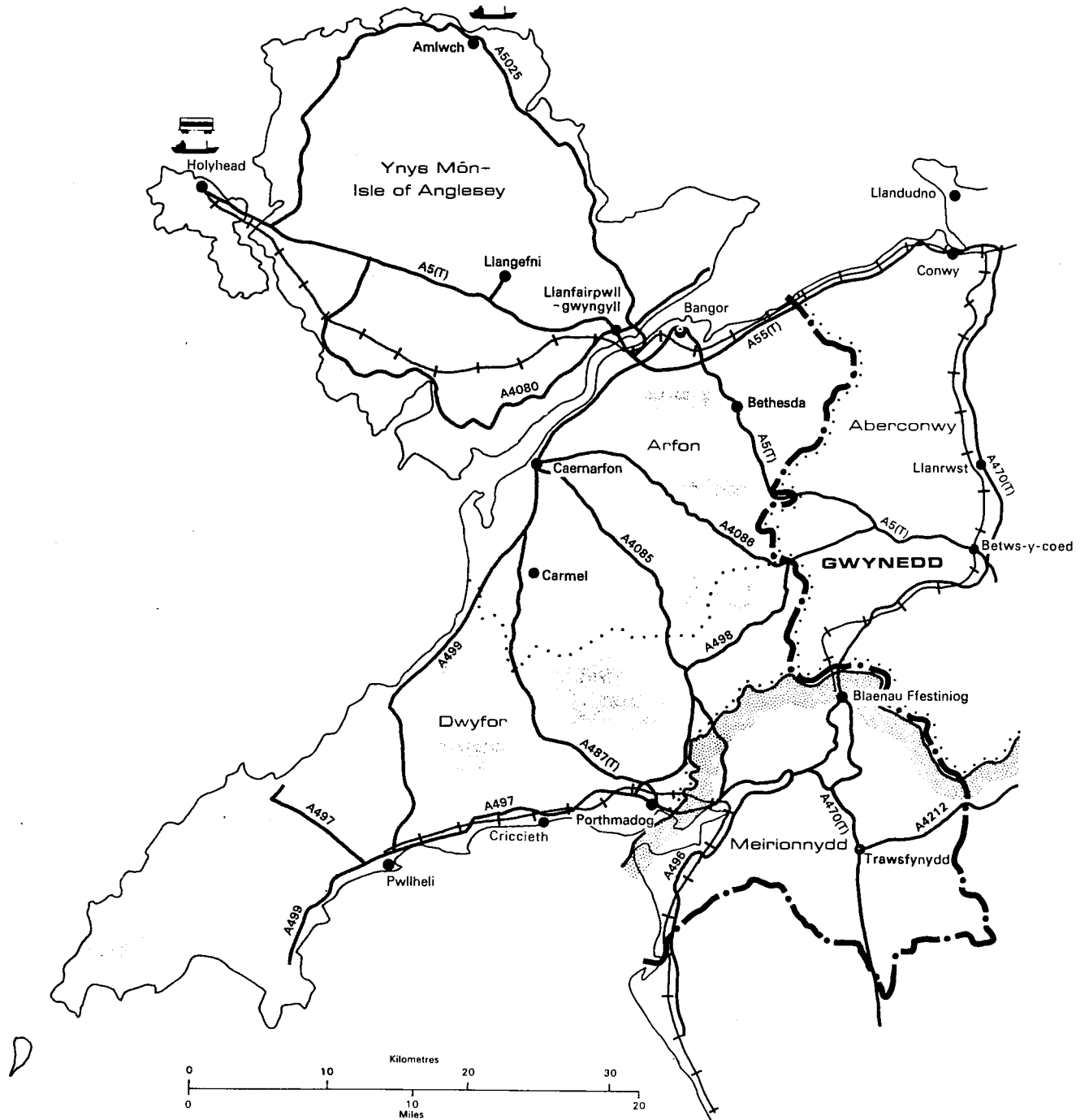
Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments (cont'd)				
Grosvenor Chater, Greenfield, industrial regeneration to include conversion of studio workshops	Start	-----	Complete	
Nercwys Road Industrial Site, land reclamation works, infrastructure, factory units and landscaping	Start	-----	Complete	
Industrial site East of Flint		Start	-----	Complete
Delyn, Village industry promotion	Start	-----	Complete	
Prestige Industrial Site, A55 Dolphin Interchange		Start	-----	Complete
Rhydymwyn, Ruby Brickworks: reclamation, infrastructure works and industrial expansion	Start	-----	Complete	
Prestatyn to Dyserth Railway Trackbed		Complete		
Tourism				
Bodelwyddan Castle	Start	-----		
Loggerheads Visitor Centre	Start	-----	Complete	
Llangollen Chapel (European Centre of Folk Studies)	Start	-----	Complete	
Rhyl Marina Hotel				Start
Ewloe Visitor Centre	Start	-----	Complete	
Chirk Visitor Centre		Start	-----	Complete
Llangollen Canal Improvements	Start	-----	Complete	
Tourist Information Centre, Ewloe Barn (A55T)		Start	-----	Complete
Connah's Quay, Development of Tourist Potential of Wepre Valley		Start	-----	Complete
Development of Tourism in Historic Hawarden		Start	-----	Complete
Tir Prince Towyn, Tourism and Leisure Complex		Start	-----	
Plas Llwyd, Recreational Project		Start	-----	
Kinmel Bay Foreshore, Parking and Dune Management Scheme	Complete			
Redevelopment of Former Pool Site, Rhos-on-Sea	Start	-----	Complete	
Eirias Park, Colwyn Bay, Refurbishment of Pavilion		Start	-----	Complete
Up-grading of Arena Track, Eirias Park		Start	-----	Complete
Colwyn Bay, New Information Bureau	-----	Complete		
Rhos-on-Sea, Provision of Sea Moorings	Start	-----	Complete	
Colwyn Bay, town centre pedestrianisation	Start	-----	Complete	
Colwyn Bay (Town Centre Redevelopment), additional car parking provision	Start	-----	Complete	
Wrexham Town Centre, redevelopment	Start	-----	Complete	
Queensway Sports Track	Start	-----	Complete	
Moss Valley, Development of Golf course and club house		Start	-----	Complete
Plas Coch, Regional Tennis Centre	Complete			
Wrexham: Museum		Start	-----	Complete
Theatre		Start	-----	Complete
Llangollen Canal, moorings and turning basin		Complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (cont'd)				
Rhyl:				
Foryd Harbour, feasibility study, further studywork	Start	Complete		
Promenade Bowling Greens, tourist facilities		Start	Complete	
Skateworld Skating rink resurfacing		Complete		
Promenade Pavilions Gardens Cafe tourism facilities				Start
Garford Road Car Park, infrastructure				Complete
Botanical Gardens, tourist facilities				Complete
Cefndy Brickworks Site, reclamation for tourist development				Complete
Public conveniences,			Complete	
Prestatyn:				
Ffrith Beach				Complete
Royal Lido	Complete			
Public conveniences				Complete
Rural Area, Rhuddlan District:				
Public conveniences				Complete
Grosvenor Chater, Greenfield				
Conversion of studio workshops, interpretation centre, cloth finishing plant. Incorporating visitor viewing facilities to woollen mill and landscaping works.	Start	Complete		
A55 Halkyn, Tourist Information and Interpretation Centre	Start	Complete		
Holywell area, Integrated programme to establish all year visitor centre, comprising pedestrianisation, townscape scheme and car parks, indoor leisure centre, regional outdoor tourism and leisure complex and craft workshops and interpretation centre				
	Start	Complete		
St Winefride's Well and Holywell				
Textile Mill, visitor interpretation facilities and tourist provision	Start	Complete		
Greenfield Valley development				
Phase 2, visitor facilities, interpretation of social, religious and industrial heritage	Start	Complete		
Greenfield Valley Ride, visitor transport link between attractions				
		Start	Complete	
Flint Castle, Environmental enhancement, interpretation facilities and water recreation project				
		Start	Complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (cont'd)				
Castle works toxic tip, redevelopment as tourism and recreation centre	Start	-----	-----	Complete
Talacre, car park provision and road improvements for existing tourist area	Start	-----	-----	Complete
Land Reclamation: Minera Lead Wastes Site	Start	-----	-----	Complete
Rail				
Clwyd, Road/Rail Freight Facilities	Start	-----	-----	-----
Link line between Wrexham and Bidston (Shotton Curve)	Start	-----	-----	-----
North Wales Main Line Improvement	Start	-----	-----	-----
Modernisation of track, level crossings and signalling between Wrexham and Chester	-----	-----	-----	Complete
New Passenger and Parcels facilities at Wrexham General Station	Complete	-----	-----	-----
Modernisation of track and signalling at Rhyl	-----	-----	-----	Complete
Electricity				
Sandycroft, New sub-station, North Wales Trade Centre	-----	-----	Start	-----
Supply Works	-----	-----	-----	-----
Bronfield Industrial Estate, Mold	-----	-----	-----	Complete
Wrexham Industrial Estate	-----	-----	-----	Complete
Deeside Industrial Estate	-----	-----	-----	Complete
Sandycroft Industrial Estate, Chester	-----	-----	-----	Complete
Telecontrol to improve security of supplies	-----	-----	-----	Complete
Llay Industrial Estate	-----	-----	-----	Complete
Flint Industrial Area	-----	-----	-----	Complete
Deeside/Connah's Quay Industrial Area	Start	-----	-----	-----
Improvements to North Wales' communications system	Start	-----	-----	-----
Improvement in Protection and security of North Wales' network	Ongoing	-----	-----	-----
Renewal and refurbishment of 33kv overhead line in North Wales	Ongoing	-----	-----	-----
Water and Sewerage				
Drury New Road, Buckley, Surface Water Improvement Scheme	-----	-----	Start	-----
Connah's Quay, Sewerage System Improvements	-----	-----	Start	-----
Connah's Quay, Wepre Pumping Station	Start	-----	-----	Complete
Shotton, Storm Water and Sewerage Improvement	-----	-----	Start	-----

Scheme	1986/7	1987/8	1988/9	1989/90
Water and Sewerage (cont'd)				
Sealand, Reconstruction of Garden City Pumping Station	Start	Complete		
Hawarden, Storm Water and Sewerage Improvements		Start		Complete
Saltney, Infrastructure Works Riverside		Start		Complete
Sandycroft, North Wales Trade Centre Infrastructure Works		Start		
Ffynon-y-Ddol, Abergele, Drainage Scheme	Start	Complete		
Glascoed Service Area Phase 2 Water Supply	Ongoing			
Glascoed Water Works Trials	Complete			
Llannerch Park, St Asaph, New Borehole				Start
Mostyn Sewage Treatment Works Extensions				Start
Five Fords Sludge Treatment		Start		
Connah's Quay Central Area Surface Water Sewers and Golftyn Pumping Station				Complete
Aston Plough Lane Surface Water Sewers	Complete			
Llangollen, Hall St Foul Sewer improvements				Complete
Prestatyn, surface water sewers				Complete
Rhyl Main Drainage Scheme				Complete
Buckley Central area Surface Water Sewers requisition			Complete	
Wrexham Area Reservoirs, Safety Works	Start			Complete
Pendinas Water Treatment Works, Improvement to EEC Standards	Start	Complete		
Llwyn Onn Works: Provision of granulated activated carbon filters and automation		Start	Complete	
Warthenbury Underground Scheme, development of water supply	Start	Complete		
Wrexham area, provision of laboratory	Complete			
Ruabon/Penycae, provision of service reservoir		Start	Complete	
Ceiriog area, provision of service reservoir	Complete			
Minera Source, development	Start	Complete		
Routine mainlaying and mainscraping	Ongoing			
Gas				
Maelor/Brymbo ring main supply system improvements				Start
Pressure Reduction station work: Rhos	Start	Complete		
St Asaph		Start	Complete	
Sealand Village		Start	Complete	

NORTH WEST WALES PROFILE AREA



Profile Area Boundary		Major Road	
Assisted Area		Main Railway	
D.B.R.W. Boundary		Freightliner Terminal	
District Boundary		Seaport	

Assisted Area Profile**WALES - NORTH WEST****Statistical summary**

Area (hectares)	206,930
Usually resident population	153,094
Density (persons per hectare)	0.740

Unemployment	June 1983	June 1984	June 1985
Thousands	9.1	9.1	10.2
Rate	16.5	16.5	18.4
Index (UK = 100)	133.1	132.0	140.5

Employment profile 1981 (SIC 80 Divisions)

	Thousands	per cent
Agriculture, forestry and fishing	2.2	4.5
Energy and water supply	4.5	5.2
Extraction of minerals, manufacture of metals, chemicals and man-made fibres	3.5	7.4
Metal goods, engineering and vehicles	2.1	4.5
Other manufacturing	2.2	4.5
Construction	3.7	7.7
Distribution, hotels & catering, repairs	9.5	19.9
Transport and communications	3.4	7.1
Financial services	2.1	4.3
Other services	16.6	34.9
TOTAL	47.7	100.0

Source: Census of Population 1981

Area definition by travel-to-work area and status:

Development areas : Holyhead

Intermediate areas : Bangor and Caernarfon; Porthmadog and Ffestiniog;
Pwllheli

8C

NORTH WEST WALES

SECTION I - SOCIAL AND ECONOMIC ANALYSIS

A. DESCRIPTION

Geography

8C1. The Assisted Areas of North West Wales, covering 206,930 hectares, comprise most of the county of Gwynedd and include the Isle of Anglesey, the Lleyn Peninsula and part of the Snowdonia National Park.

8C2. The area is bordered in the east by the Conwy Valley, the south by Cardigan Bay, and the west and north by the Irish Sea. The main population centres in the area, Holyhead, Caernarfon and Bangor are about 400km from London and over 300km from Cardiff.

8C3. The area is renowned for its mountain, valley and coastal scenery which is often spectacular. The mainland is dominated by the Snowdonia National Park, and the coastlines of the Isle of Anglesey and the Lleyn Peninsula are designated as Areas of Outstanding Natural Beauty. Agriculturally the majority of the area was included in the Less Favoured Area in 1984.

Communications

8C4. Road Links in the area are generally east-west. The most important routes are the A55(T) along the North Wales Coast and the A5(T) which links the port at Holyhead on Anglesey to the A55(T) and thence to the national trunk road and motorway network.

8C5. The main rail route runs along the North West Coast and provides links with Holyhead and the UK network via Crewe. The port at Holyhead provides a ferry service to Dun Laoghaire and Dullon in the Republic of Ireland and a container service to Dublin and Belfast.

Population

8C6. The population of this sparsely populated area of Wales is concentrated in the coastal zone - particularly in the Bangor-Caernarfon area. Over the last 10 years the population has increased by around 3 per cent to over 160,000 in 1984. The rise was entirely due to net immigration which more than balanced natural decline (an excess of deaths over births).

8C7. The population of working age is estimated to have risen by 7,000 (or 0.8 per cent a year) over the decade to about 97,000 in 1984. Official population projections are produced at the county level and the most recent suggests that the population will continue to increase. The working age population of Gwynedd is projected to increase at a slower rate (of 0.4 per cent a year) up to 1991.

Table 1. Estimated Population 1984 - NW Wales

	Number	% of Total Population
Under working age	37,000	23.1
Working age	46,400	60.2
Over working age	26,800	16.7
	-----	-----
	160,200	100.0

Table 2. Population Change 1974-1984 - North West Wales

Total Change	5.4
Natural Change	- 0.9
Balance	6.3

Income

8C8. The Second Periodic Report on the Regions of Europe shows that on the basis of a synthetic index measuring the relative intensity of regional problems in the Community a group of four Welsh counties (partly included in the profile area ie. Clwyd, Dyfed, Gwynedd and Powys) are ranked 23rd in the Community out of 131 regional areas.

8C9. Only part of Gwynedd is covered by the North-West Wales area and no data is available on females' income because of the small sample involved. The male average gross weekly earnings, however, are shown to be consistently below the Welsh average and well below the GB figure.

Table 3. Average Gross Weekly Earnings of full-time adults (a)

	£ per week in April					
	Males			Females		
	1977	1981	1985	1977	1981	1985
Gwynedd	74.4	127.4	174.5	(b)	(b)	(b)
Wales	76.5	132.7	179.1	50.2	87.5	118.8
Great Britain	78.6	140.5	192.4	51.0	91.4	126.4

(a) Full-time men aged 21 and over and full-time women aged 18 and over (age at 1 January 1977 and 1 January 1981) and full-time men and women on adult rates for 1984, whose pay for the survey pay-period was not affected by absence.

(b) Results are only published for areas regularly represented by 100 or more people in the sample and where the standard error of average gross weekly earnings does not exceed 4.0% of the average.

Source: Net Earnings Surveys

Industrial Structure

8C10. In April 1981, 64,600 (5.5 per cent) of the civilian working population of Wales were in North West Wales.

8C11. The total number employed fell slightly between 1977 and 1981, there being decreases in all sectors apart from the utilities and services. Engineering and allied industries and the construction industry were the major losers of employees. The area has an interesting pattern of employment in that it has more than the Welsh or GB average of employees in agriculture, forestry, fishing and services and also metal manufacture. There is also a relatively large proportion in the utilities sector and relatively small proportions in the engineering and allied industries and other manufacturing sectors.

Table 4. Industrial Structure

Total Percentage of Employees in Employment

	NW Wales		GB	
	1977	1981	1977	1981
Agriculture, forestry & fishing	6.3	6.2	1.7	1.6
Mining & quarrying	0.7	0.8	1.6	1.6
Metal Manufacture	5.2	5.4	2.2	1.5
Engineering and allied industrial	5.6	4.3	14.7	13.2
All other manufacturing	8.2	7.8	15.4	13.6
Construction	8.2	6.2	5.6	5.3
Gas, electricity and water	5.2	5.8	1.5	1.6
Service industries	60.2	63.6	57.3	61.4

Source: Censuses of employment (excludes self employed)

B. ECONOMIC AND SOCIAL ASSESSMENT

8C12. The fundamental factors affecting the development of the NW Wales area are its location, which is remote from the main centres of population, its terrain, its dependence on a series of large construction projects and the need to retain its unique cultural identity. The main problems are primarily:

- i. a weak employment base and lack of opportunity;
- ii. inadequacies in infrastructure particularly that directly supporting industry; and also,
- iii. social problems associated with the industrial history of the area and the preservation of the cultural heritage of the area while simultaneously developing and strengthening the area's economic base.

Each of these is analysed separately below.

i. **Employment**

8C13. Three in every five employees in North West Wales were employed in the service industries in 1977 and this reliance had increased slightly by 1981. The area has a relatively small population base and the losses of over 20 per cent in the 'mining and quarrying', 'engineering and allied industries' and 'construction' groups were in absolute terms fairly small. Nevertheless, the effect of a loss of 400 employees in the engineering group obviously had serious consequences for such an area and the run-down in the construction industry after the completion of the Dinorwic Power Station is plainly to be seen. A relatively large proportion of the population are engaged in the Gas, Electricity and Water Sectors, reflecting Central Electricity Generating Board involvement in the area, especially at Trawsfynydd and Wylfa. Accordingly there is much local concern about the future of these nuclear power stations.

8C14. The overall loss of only 1000 employees in employment, although small in relation to more populous areas, still constituted 4 per cent of the area's 1977 employees.

Table 5. Employment Structure

	Employees in Employment		
	NW Wales		
	Thousands		% Change
	1977	1981	
Agriculture, forestry and fishing	1.7	1.6	- 6
Mining and quarrying	0.2	0.2	- 23
Metal manufacture	1.4	1.4	- 3
Engineering and allied industries	1.5	1.1	- 24
All other manufacturing	2.2	2.0	- 6
Construction	2.2	1.6	- 29
Gas, electricity and water	1.4	1.5	+ 3
Service Industries	16.2	16.4	+ 1
All employees in employment	26.9	25.8	- 4

Source: Censuses of employment (excludes self employed)

8C15. Further analysis of the industrial structure of this area as regards the service industries shows that the hotels and catering class and the public administration and national defence class are greatly over-represented in comparison to the Welsh employment pattern. Approximately 7.5 per cent are employed in the former compared with 4.7 per cent for Wales and 18.2 per cent in public administration compared with 10.8 per cent overall. Although the actual numbers involved are not great it illustrates the dependence of the area on these sectors and the weakness of others, in particular engineering and manufacturing.

Recent Developments in Manufacturing

8C16. The local manufacturing sector has remained a relatively small provider of job opportunities. The available evidence indicates that the level of employment in manufacturing has fallen since 1981.

8C17. Many of the manufacturing plants in the area have been reducing labour force levels, with locally significant job losses at the larger manufacturing plants.

8C18. Since May 1981 there have been only a small number of plant closures, but job losses at these plants have still more than offset an even smaller number of job opportunities as a result of new plant openings. Neither of these components has been of a significant magnitude.

8C19. The six largest manufacturing plants in the area provide over 40 per cent of all manufacturing job opportunities.

8C20. The more important manufacturing sectors are electrical and electronic engineering; food processing; non-ferrous metals and non-metallic mineral products. However, this reflects the incidence of one or two major plants in these particular industries and there is a significant local dependence upon prospects at these large plants.

Agriculture

8C21. The employees in employment figure understates the number of persons engaged in agriculture as a large proportion of the workforce is self employed. Currently about one quarter of agricultural workers are hired. In June 1981 there were nearly 4,600 workers on 3,500 holdings. This had risen to nearly 4,800 workers on over 3,500 holdings in 1984.

Table 6. Employment in Agriculture, Fishing and Forestry

	June 1981	June 1984
Whole-time		
Employees	800	700
Self employed	2,500	2,600
Total Whole-time	3,300	3,300
Part-time		
Employees	300	400
Self employed	900	1,100
Total Part time	1,200	1,450
Total employees	1,100	1,100
Total self employed	3,500	3,700
Total workers	4,600	4,800
Total holdings	3,500	3,500

Employees - hired family or other workers, salaried managers

Self employed - farmers, partners and directors

Excluded - spouses of farmers, partners and directors, casual workers

Activity Rates

8C22. Male economic activity rates in North West Wales are just above the Wales average, but the female rate is considerably lower. Neither rate, however, is as high as the GB rate and the female rate is, in fact, over 11 per cent below.

Unemployment

8C23. Unemployment in North West Wales rose again between 1984 and 1985 after remaining at the same level during the previous year. By 1985, therefore, it had risen to a level 40 per cent higher than the UK rate. Only the Porthmadog and Ffestiniog travel-to-work area had a male unemployment rate less than 20 per cent by June 1985 and the Holyhead area had an 'all persons' rate of 21.6 per cent. All areas' positions had deteriorated between 1983 and 1985.

Table 7. Unemployment Rates

Travel-to-work areas	June 1983*			June 1985		
	Total number	Total %	Male %	Total number	Total %	Male %
Bangor & Caernarfon	4,374	16.3	20.9	4,862	18.1	22.4
Holyhead	3,310	19.3	22.3	3,670	21.6	23.9
Porthmadog & Ffestiniog	7,561	2.51	13.9	855	14.1	15.8
Pwllheli	6,691	2.61	16.7	811	15.2	20.0

* Figures affected by statistical base change due to 1983 Budget measures

8C24. The long-term unemployed, ie those out of work for a year or more had increased to more than 4,500 by June 1985 - some 500 more than in the previous year.

Seasonal Unemployment

8C25. Seasonal unemployment is shown to be a considerable problem in North West Wales by the comparison of the June and December unemployment rates for 1983 and 1985. Although the Bangor and Caernarfon TTWA shows a difference between the months of only 1.5 per cent in 1985, it is 8.6 per cent in Pwllheli TTWA. The situation also seems to have deteriorated between the two years, as the gap has widened in all areas. In fact, whereas the problem was relatively slight in both Bangor and Caernarfon and Holyhead in 1983, the latter appear to have become a seasonal employment area by 1985.

Table 8. Unemployment: seasonal trends

Travel to Work Areas	Dec 1983*			Dec 1985		
	Total no	Total %	Male %	Total no	Total %	Male %
Bangor and Caernarfon	4,493	16.7	20.8	5,261	19.6	23.9
Holyhead	3,583	20.9	23.3	4,129	24.3	27.1
Porthmadog and Ffestiniog	1,031	17.0	17.7	1,106	18.2	19.6
Pwllheli	989	18.7	21.1	1,215	22.7	28.6

* Figures affected by statistical base change due to 1983 Budget measures

ii. **Infrastructure**

8C26. Ultimately, the full potential of direct measures to tackle NW Wales' basic economic problems will not be realised without complementary efforts to upgrade the communications, water and sewerage, fuel and power services which directly support industrial activity. The main problems are outlined below.

Communications

8C27. The most important road routes in the area are broadly east-west links formed by the A55(T) route along the North Wales Coast and the A5(T) which links with the ferry to Ireland at Holyhead. The provision of an adequate road network is hampered by the area's remoteness from centres of population and markets and the heavy influx of tourist traffic in the holiday season. Those parts of the A55(T) that have not yet been upgraded are inadequate and become heavily congested in summer and some problems are also experienced on the A5. Heavy traffic puts additional strain on bridges which must be strengthened or replaced.

8C28. The main centres of population are relatively well served by the North Wales coastal railway line which provides links along the north coast into the national network via Crewe and is heavily used by tourists during the summer. The line which has been developed with ERDF support provides a through service to the ferry port of Holyhead and a branch line diverts at Llandudno Junction to strike south into Snowdonia where it links with a privately owned mountain railway at Blaenau Ffestiniog, a major tourist attraction. Whilst the service on the north coast line is reasonable, the full exploitation of the inter-city trains which use the line is limited by speed restrictions and manual, semaphore signalling. The Cambrian Coast line, links the south west of the area with mid-Wales and Shrewsbury in England. British Rail's recent announcement of an investment package for this line which involves the introduction of new rolling stock, radio signalling and level crossing modernisation will bring a significant improvement to services: a twice daily Bangor-Cardiff direct connection has already been introduced.

8C29. The main port facilities in Gwynedd are situated at Holyhead in Anglesey. Here the port is operated by Sealink British Ferries and apart

from container traffic to Belfast, is almost exclusively concerned with the passenger and cargo trade with Eire. The company is constructing an additional roll-on/roll-off facility which it is hoped will increase Holyhead's importance as an Irish freight connection. The port is also used for the importation of ore for the Anglesey Aluminium Smelter via a jetty and associated facilities operated by the company.

Other Services

8C30. The development of the water and sewerage infrastructure in this area has been very limited because of the very scattered nature of the communities and the consequential high capital cost of providing services to outlying areas. Although considerable progress has been made over the last three years serious problems still exist which will take time and money to remedy. While rainfall is high, the reliability of the public water supply and the adequacy of the drainage facilities in certain areas are deficient and pressure has been increased by the substantial influx of tourists to the area in peak holiday periods in some parts trebling the resident population. Waterlogging and tidal flooding are consequent on high rainfall and local geography: drainage problems occur throughout the area but particular flooding difficulties are encountered in the low-lying valleys and coastal flats. In the urban areas, the inadequacy of culverts/bridges has led to frequent flooding of roads and properties during periods of heavy rainfall particularly when coupled with high tides.

8C31. Welsh waste disposal activities are on a small scale and individual district councils are finding increasingly that new sites are difficult to find and expensive to develop to basic standards of pollution control and amenity protection. Local Authority waste disposal sites could, in certain circumstances, with the agreement of the Water Authorities, be adapted to receive a wide range of wastes, including industrial wastes. It is now generally recognised that such facilities are an essential support for industry.

8C32. The requirement to provide a gas supply adequate for industrial development needs has led to the plans to reinforce the gas transmission throughout NW Wales to be brought forward. Further reinforcement of the electricity system is also required. Investment is also required in telecommunications in the profile area in order to meet the needs of local

industry and assist in making the area more attractive to incoming industry. The DBRW investment programme (described at paragraph 8F57) to provide advanced telecommunications systems will benefit the Meirionydd part of the North West Wales profile area.

iii. **Social**

8C33. There is a continuing need in NW Wales for attention to be given to the improvement of the social infrastructure. This is required, as in other profile areas, to harmonise with efforts to develop the economy but there is a particular additional need in NW Wales for social infrastructure to be improved in order to maintain existing communities at threat from selective out-migration, particularly of the young, and to preserve and safeguard the particularly rich cultural heritage and traditions. The Welsh language is an important part of life in the area: in 1981 63 per cent of the population of Gwynedd (aged 3 and over) could speak Welsh compared with 19 per cent in Wales as a whole. While tourism continues to play an important role in this strategy, care is taken to avoid an over concentration of second holiday homes in particular localities where there might be an adverse localised effect despite the more general benefit to the area.

8C34. NW Wales also suffers from small pockets of poor housing, mostly dwellings built during the middle and latter parts of the 19th Century. Almost 60% of the housing stock was built before 1919 and 13% of the total housing stock is unfit. Similar problems occur in other aspects of the social infrastructure.

C. **PROSPECTS**

8C35. It is likely that in the short term there will be further job losses in the North West Wales area with the possibility of further labour shedding at larger manufacturing plants where a relatively low number of companies dominate the employment scene; in agriculture where small farms suffered following the effects of the introduction of EC milk quotas; the future of the dry dock and marine yard at Holyhead - which is becoming increasingly unable to deal with the new generation of ferries due to their size- also remains uncertain. Trawsfynydd power station is scheduled for closure soon after the programme period. Further job losses particularly

on Anglesey - although probably small in absolute numbers - will have severe consequences for the area which is already experiencing high levels of unemployment and continuing difficulty in attracting alternative employment to its peripheral location. Employment opportunities have already declined substantially - particularly as a result of the run-down in employment in construction at the Dinorwig Power Station.

8C36. It is projected that the population of Gwynedd will increase by 4.4 per cent between 1983 and 1991 with the working age group increasing by 3 per cent in that period. If 1981 activity rates are maintained it is possible that a further 2,000 could be added to the labour force of Gwynedd by 1991, further exacerbating the current high level of unemployment unless additional jobs have been created.

8C37. Given the area's natural advantages, and the uncertainties about employment in manufacturing, tourism will continue to play an important role, particularly if the typically short traditional season can be extended. Agriculture also has a role of continuing importance despite recent set-backs. However a considerable task remains in order to overcome the area's physical constraints of peripherality, topography and scattered settlement if the economy is to be diversified and permanent employment provided.

SECTION 2 - DEVELOPMENT OBJECTIVES

8C38. A number of problems which are hindering the economic growth of the NW Wales area have to be tackled having regard to the fact that overriding objective is to expand and diversify the area's economic base and so reduce the area's adverse rates of unemployment and improve the low income levels. Particular objectives are:-

A. ECONOMIC

- i. to stimulate permanent employment growth by the encouragement of investment in the area and the formation and expansion of small firms and indigenous industry and the attraction of mobile industrial projects;

ii. to provide factory space and development land for new or expanding ventures in areas identified for growth and on a smaller scale in rural areas to prevent outward migration;

iii. to teach and improve working skills through the continued use of manpower training programmes;

iv. to further exploit NW Wales' tourist potential, particularly concentrating on the development of the cultural heritage of the area in order to broaden the appeal of the resource base of scenery and recreation with a view to extending markets and the holiday season; recognising the problems associated with over concentration of holiday accommodation in certain localities.

v. to fulfil the potential of the rural environment including the development of the agricultural, forestry, and fishing industries.

B. DIRECT INFRASTRUCTURE

i. to provide greater accessibility to the area in the interests of both attracting industry and exploiting tourism by maintaining and improving port and airport facilities and road and rail links between east and west and thus raising the standard of communications with other UK regions and overseas countries. An important feature will be farther exploiting the potential of the port of Holyhead - possibly to include oil and gas exploration;

ii. to maintain and improve the standard of communications and public transport network within the area to facilitate indigenous economic growth;

iii. to upgrade the general standard of direct infrastructure support for industry and - increasingly - for tourism; for instance water, sewerage, waste disposal and the utilities and environmental protection.

C. SOCIAL INFRASTRUCTURE

to provide adequate social conditions in which the development of industry can flourish.

SECTION 3 - DEVELOPMENT MEASURES

8C39. The measures outlined illustrate the continuing work being undertaken in a bid to meet the objectives for the economic development of the area.

8C40. Assistance from the European Community is particularly important and North West Wales has derived particular benefit for the development of road, industrial and tourism infrastructure. Whilst the bulk of the aid is accounted for in EIB loans of £169 million to the CEEGB's Dinorwig station, the ERDF has contributed some £11.4 million to over 100 schemes the most significant of which are set out in Appendix 1. In addition the area has gained from 'supplementary measures', FEOGA and ESF (benefiting nationally administered MSC schemes) but the amounts involved are not separately identifiable.

A. ECONOMIC

Financial Assistance

8C41. Financial assistance to industry continues to be important, in order to encourage the development of industry, in particular to stimulate the growth of the small business sector and attract mobile industrial projects. Direct financial assistance is made available by Central Government, through the availability of Regional Development Grants (for the Development Areas) and Regional Selective Assistance. In 1983/84 and 1984/85 payments of old-style Regional Development Grants of £25,000 and over in North West Wales had a total value of £1.397 million. Offers of Regional Selective Assistance accepted in 1983/84 and 1984/5 totalled some £1.163 million.

8C42. In addition agencies in the area such as the Welsh Development Agency and the Wales Tourist Board and also the DBRW and the local authorities stimulate industry by the provision of equity capital, loans,

grants and promotional work. The development of existing and intending small businesses is further stimulated by the ready provision of advice and information particularly by the WDA's Business Development Unit and the Small Firms Service, which is administered by the WDA in association with the Department of Employment; and the DBRW and local authorities. The Urban Programme and the Urban Development Grant scheme also provide financial assistance for economic schemes by means of a 75 per cent grant from Central Government to local authorities for expenditure they incur on approved projects. For 1986/87 schemes which are directed towards economic and social regeneration, especially those encouraging the creation of small business ventures and jobs continue to receive high priority. Nearly £0.4 million has been allocated to economic schemes in the area in 1986/87. Local authorities in Gwynedd (in conjunction with Dyfed and Powys and with assistance from the ESF) are also operating a scheme to subsidise wages to firms employing less than 25 persons in order to stimulate their growth and provide employment.

Industrial Sites/Factory Building

8C43. The programme of developing industrial estates in NW Wales is continuing. The local authorities have provided a number of small industrial estates ranging from 30-40 acres, in several cases with grant assistance from the ERDF, for example at Llandegai and Caernarfon. Major estates in the area are located at Caernarfon, Bangor, Porthmadog, Pwllheli, and on Anglesey at Holyhead, Amlwch, Gaerwen and Llangefni. Throughout the area the Welsh Development Agency has built on numerous sites and since January 1976 has completed 144 units, totalling over 300,000 sq ft. The Agency has concentrated on the provision of small factories of under 5,000 sq ft suitable for the expansion of local small firms and for the establishment of new businesses. Over 90 per cent of the units built to date in the area fall into this category. In the south of the area the Development Board for Rural Wales holds 3 advance factories in Blaenau Ffestiniog and Penrhyndeudraeth totalling 3,000 sq ft and a further 4 factories are under construction in Blaenau Ffestiniog (3,000 sq ft). The local authorities intend providing further serviced sites, premises and supporting infrastructure at a variety of localities in the programme period - for example, Caernarfon, Bangor, Llangefni and a number of workshops in villages on Anglesey. At Bangor University, Gwynedd County Council and Arfon Borough Council are cooperating in the provision of

science enterprise units, work on which will continue into the programme period.

Land Reclamation

8C44. The WDA also provides for land reclamation in the area. During the period of 1976 to 1985, it approved 16 projects to reclaim about 180 acres of land primarily in areas affected by slate dereliction. The latest programme of work includes 3 major schemes, with estimated individual project costs in excess of £0.5 million. Two will result in amenity after use while the largest will tackle slate dereliction in Blaenau Ffestiniog.

Tourism

8C45. Major tourism projects which can develop new attractions and create job opportunities in NW Wales are being actively encouraged. Since 1979 a conference and leisure centre has been created at Llandudno which is now outside the profile area but one of several tourist facilities drawing on a common tourism catchment to be supported by the ERDF. Centres within the profile area are located at Caernarfon and at Holyhead and Amlwch in Anglesey. Between them these 4 centres alone have been granted over £1.2 million in ERDF aid. The Wales Tourist Board has commissioned the European Centre for Folk Studies at Llangollen to undertake an independent study of the social, cultural, linguistic impact of tourism in Wales. The study will involve an in-depth investigation of specific towns chosen as case studies some of which will be in North-West Wales.

8C46. Future plans include a major development at Llanberis being provided by Arfon Borough Council in conjunction with the private sector where a large area of former quarry workings has been purchased with a view to reclamation and development for leisure use. Marina developments are planned for Y Felinheli (Portdinorwig), Holyhead, Pwllheli and Bangor; an art gallery on Anglesey; interpretive facilities at Llandegai and the development of a Welsh cultural centre at Blaenau Ffestiniog. Other development options continue to be identified to exploit the potential of sites opened up by improvement to the A55 and a range of other direct and supporting tourism developments at a variety of localities is planned for the programme period. These will include regional sports facilities at Bangor; environmental protection and conservation schemes (for example

coast protection) a variety of water based and recreational/leisure projects, as well as infrastructural improvement (eg. refuse disposal/pulverisation schemes; sewerage schemes) made necessary by the seasonal influx of visitors to the area.

Training

8C47. Training of the workforce by industry is supplemented by Central and local government. The training and vocational education programmes provided by the Manpower Services Commission are now more flexible and more responsive to the changing needs of industry. There has been a move away from long duration, Skillcentre based training for unemployed people. The MSC is acting more as a catalyst providing direct pump priming support to industry, including small businesses, both on employer premises and at local institutes of further and higher education. Local authorities complement such training by acting as YTS managing agents and as sponsors of Community Programme schemes. Local authorities in the area have assisted with funding for the Information Technology Centre at Caernarfon.

B. INFRASTRUCTURE

Road Communications

8C48. The upgrading of the A55(T) East-West route across North Wales continues to be the main priority of the trunk road improvement programme in Wales. A series of planned improvement schemes will substantially improve access to the profile area, thus helping to stimulate the growth of tourism and industry in an area of high unemployment as well as bringing substantial environmental benefits. In recent years several sections of the A55/A5 route to the port of Holyhead have been upgraded; in 1980 a second road crossing was completed between Anglesey and the mainland via the Britannia Bridge, and in 1983 major by-passes for Llanfair PG and Bangor were provided. A major improvement scheme (Penmaenbach-Dwygyfylchi) just to the west of the Conwy Estuary is under way. In the period up to December 1987 it is planned to start construction on three further major schemes at a total estimated cost of £228 million. The most important of these will be the Conwy crossing scheme involving the construction of an immersed tube tunnel beneath the estuary. The others comprise the provision of by-passes for Penmaenmawr and Llanfairfechan. Subsequently,

in the period between January 1988 and December 1990 it is planned to commence construction on the Aber Improvement and Pen-y-Clip Tunnels at an estimated total cost of £38 million. In the same period the programme envisages a start being made on three projects to upgrade the A487 in the vicinity of Caernarfon. For the period after 1990 consideration is being given to providing by-passes for Llanrwst (A470) and Bethesda (A5) and for communities on the A5 on Anglesey.

8C49. The upgrading of the trunk road network in the area is supplemented by improvements undertaken by Gwynedd County Council as local highway authority. Over the last few years a number of county road improvements have been carried out including a link from the A5025 to the A5 Llanfair PG By-pass which has reduced traffic congestion in the Menai Bridge area. The Llanystumdwy By-pass has also been completed, so improving traffic flow along the heavily used A497 which links Pwllheli to the trunk road network, and greatly reducing the traffic delay and congestion in the summer in the village of Llanystumdwy. Major improvements have also been undertaken on the A499, a heavily used tourist route, which will be increasingly accessible following the completion of the improvements to the A55.

Rail development

8C50. An effective railway network is also important to reduce the disadvantages of NW Wales' peripherality and scattered pattern of settlement and exploit the area's potential for tourism. Local authority initiatives have already led to the reopening of the station of Valley on Anglesey and to the rebuilding of the station at Blaenau Ffestiniog. The latter scheme, which was jointly funded by the County Council and the District Council and which received central government support through the urban programme and the agencies of the WDA and DBRW as well as ERDF grant aid, is intended to ensure a substantial influx of tourists to both Blaenau Ffestiniog and its environs. Other developments are planned and will involve public sector investment of over £1.75 million in the programme period, primarily in a major joint project to be undertaken by Sealink, Anglesey Borough Council and British Rail to provide new terminal facilities at Holyhead Harbour which will provide modern new passenger facilities making the port and the ferry route more attractive to travellers (assisting the security of jobs and the viability of the port);

another planned development is a new passenger and parcels facility at Bangor Station which aims to improve this strategic tourist railhead and assist in attracting more visitors to the area.

Port Development

8C51. The importance of the port facilities at Holyhead and its connecting road and rail facilities are fully recognised. In addition to substantial past investment in the port in a new ferry for the Holyhead to Dun Laoghaire route and in improvements for the Holyhead-Dublin service and past and continuing improvement to the A55 (although the A5 on Anglesey to Holyhead remains in need of improvement) - there are plans for further substantial investment in the port facilities during the programme period at a total cost of over £8 million. In addition to the provision of new terminal facilities (paragraph 8C50 above) this involves the completion of a new deep water RO/RoBERTH together with the provision of adjacent standage areas to serve it as well as major quay refurbishment. This expenditure is necessary to exploit Holyhead's unique position as the shortest sea route to Dublin which provides considerable economies for ferry operation and should enable a significant number of direct and indirect job opportunities to be created. In addition this port has seen a growth in its use by the fishing industry (total landings in 1984 2,400 tonnes) including vessels from other areas of the UK and the EC. There is potential for further limited growth based on the diversity of locally available stocks and the port's good geographical position in relation to fishing grounds. Accordingly the Ynys Mon (Isle of Anglesey) Borough Council has plans to provide much needed improvements to the berthing and related quay side facilities for the fishing industry at a cost of about £1 million. There are prospects for growth in the shellfish industry - for example, mussels in the Menai Straits.

Water and Sewerage

8C52. Although the Welsh Water Authority have attempted to correct the inadequacies of the water and sewerage infrastructure in NW Wales by a considerable investment programme in all aspects of the water service, considerable work is still required in order to bring the services to a satisfactory condition and in particular for it to be made capable of coping with peak demands in the tourism season.

8C53. A substantial investment programme with a total cost of almost £6.5 million is planned for the area in the programme period. This will include water supply service improvements to meet industrial and tourism needs at a variety of locations including Pentir, the Beddgelert area, Blaenau Ffestiniog, Penrhyndeudraeth, Holyhead, Alaw, Penmynydd, Bodafon and Carmel; and to bring water treatment to EEC standard at a number of locations including Cwmstadllyn, Blaenau Ffestiniog, Cilfor, Talwaenydd and Trawsfynydd. Additionally sewage disposal improvement works for the benefit of industry and tourism are planned at a number of locations including Clynnog, Morfa Bychan, Gaerwen and Bangor and sewerage works to meet industrial and tourism demand at Penygroes, Amlwch and Morfa Bychan.

Support Services

8C54. Improvements to the gas transmission system in NW Wales are underway though at present major projects envisaged are confined to pressure reduction stations. However where there is a demand to extend the system to the remoter communities or in response to industrial developments further reinforcement work will be undertaken. Improvements to the electricity network at three industrial estates in the area - Llandegai, Bangor and Holyhead and Gaerwen in Anglesey have been completed or are near completion, all with ERDF support. Improvement to the Area network generally and renewal and refurbishment work on overhead lines throughout North Wales will continue. Estimated capital expenditure involved in the programme period for improvements to the electricity network in NW Wales will be £2.3 million and the major part of this investment will relate to improvements to the 33KV overhead line in order to strengthen supplies to industrial customers.

C. SOCIAL INFRASTRUCTURE

8C55. Improvement to the social infrastructure is also required. Outdated schools and residential homes for the elderly lead to a need for replacement capital investment. A new district General Hospital at Bangor serving the whole of the area, has been completed as a part of a major programme to improve health infrastructure throughout Wales. Further developments are planned at Bangor and substantial redevelopment of Llandudno General Hospital is presently underway. Land reclamation programmes (paragraph 8C43) provide improved environmental conditions as well as directly assisting industrial growth.

8C56. The Urban Programme also assists social schemes. In 1986/87 expenditure amounting to some £0.5 million has been allocated to social schemes in NW Wales with Central Government's contribution at the rate of 75 per cent. Urban Development Grants, in some cases, are also available to bring forward projects which can contribute to social needs. Additionally the area's further education colleges play a role in the area's social life. Social projects in the district of Meirionnydd are assisted by grants from the DBRW: in 1985/86 an estimated £59,000 will be provided for schemes undertaken by local authorities and voluntary bodies. A similar level of assistance is available for 1986/87.

8C57. Appendix 2 tabulates some of the main projects being undertaken in NW Wales during the programme period in order to further the objectives outlined in Section 2. The list is indicative of current projections and priorities rather than a complete and definitive listing of all schemes.

SECTION 4 - IMPLEMENTATION AND COORDINATION OF INVESTMENT

Financial Resources

8C58. The following estimates of capital expenditure in the Profile Area over the programme period are based upon project costs as identified by the local authorities and public bodies which contributed to the compilation of the programme. Practical considerations preclude the preparation of accurate estimates for every project listed in the Appendix and the totals are therefore indicative only.

	1986-87	1987-88	1988-89	89-90
	£m	£m	£m	£m
Factory building, site development and land reclamation	0.4	0.4	0.4	0.5
Tourism	3.9	4.0	4.0	3.9
Roads	0.3	0.5	1.0	8.3
Rail	1.3	0.3	0.2	0
Ports	3.4	1.6	1.5	1.5
Water, sewerage and flood protection	3.0	1.7	1.5	1.3
Electricity	0.7	0.7	0.7	0.7
Gas	0.1	0.1	0.1	0

Notes: Factory building, site development and land reclamation - excludes expenditure by Welsh Development Agency

Tourism - excludes Wales Tourist Board Grant

Roads - estimated expenditure on trunk roads, and on county roads over £5 million. Estimates provided by Welsh Office.

Coordination of Investment

8C59. Gwynedd County Council's Structure Plan has been approved by the Secretary of State and contains policies and proposals for the development of the area up to 1991. In addition, Local Plans, prepared by the District Councils (except in National Parks where they are prepared by the County Councils) are required to be in general conformity with the Structure Plan for the area they are in. These plans provide a system for the coordination of investment. In addition the district of Meirionnydd lies within the area of operation of the Development Board for Rural Wales which was established statutorily in 1977 to promote the economic and social well-being of the people in its area. The DBRW works in close consultation with the local authorities and other statutory and non-statutory bodies in the course of formulating its development programme. The co-ordination of tourism developments is vital to the area. The Wales Tourist Board have set up three Regional Tourism Councils, one of which is in South Wales. The role of the North Wales Tourism Council is an advisory body which provides the Board with the collective views of the tourist industry throughout the whole of the North Wales area. The affairs of the Council are organised by a Joint Committee which consists of equal numbers of local authority representatives and members from the trade - hoteliers, self-caterers, attraction owners etc. Beneath the Committee are two panels - one for marketing; the other for development.

8C60. A continuing obstacle to stimulating the economic growth of NW Wales is the communication difficulties which apply to access to and within the area. The comprehensive upgrading of the A55-A5 route, together with complementary county road schemes, form the basis of the strategy to overcome this and is of vital importance to the area. Because of the high concentration of employment in services and utilities there is much concern over the prospects for these employment opportunities currently represented by the Trawsfynydd and Wylfa power stations. In the light of continuing job losses there and elsewhere, work to improve communications must be paralleled by continuing efforts to stimulate employment in manufacturing, small businesses and tourism and to renew unsatisfactory supporting infrastructure - particularly water and sewerage.

8C61. The County Councils of Gwynedd, Dyfed and Powys have been co-sponsors of a study, funded with assistance from the EC Regional Fund, to examine the scope for integrated action in the area. The study, due for completion in 1986, will advance ideas for the development of Agriculture, Forestry, Fisheries and related industries and will also examine the prospects for Tourism development and the future of manufacturing industries. The study is also likely to highlight major problems in communications development including telecommunications. Proposals for the coordination of policies and investment will also be advanced.

ERDF AID TO NORTH WEST WALES

Indicative projects which have received aid in recent years
(paragraph 8C39 refers)

Authority	Project	Eligible Cost £	Grant Commitment £
Road Communications			
Gwynedd CC	Pant Lodge - Fourcrosses, Llanfair	485,000	145,500
Gwynedd CC	A499 Glyn Llifon Bends, Caerns	485,000	145,500
Gwynedd CC	A499 Mor Mawr Glyncoch etc	203,300	101,650
Gwynedd CC	Llanstymdwy By-pass	1,235,000	370,500
Transport			
British Railways Board	Holyhead Harbour improvements	970,000	291,000
Sealink Ferries	Holyhead Harbour, vehicle standage	140,000	42,000
Tourism Development			
Gwynedd CC	Snowdon Summit Building	397,00	198,500
Dwyfor DC	Dwyfor Pulverisor Plant	1,603,163	801,581
Ynys Mon BC	Amlwch leisure complex Phase 2	507,583	152,275
Ynys Mon BC	Holyhead leisure complex Phase 3	842,774	102,832
Public Utilities			
Welsh Water Authority	Bethesda area improvement	236,000	118,000
Welsh Water Authority	Llyn Distribution Phase 2	470,900	141,270
Welsh Water Authority	Britannia Bridge water mains	921,204	276,361
Wales Gas	NW Wales reinforcement	2,034,428	610,328

NORTH WEST WALES INDICATIVE MAJOR INFRASTRUCTURE DEVELOPMENTS 1986-90
(PARAGRAPH 8C56 REFERS)

Scheme	1986/7	1987/8	1988/9	1989/90
Trunk Roads				
A55 Aber Improvement				start—
Principal Roads				
A499 Trallwyn - Bryn Arlais	start-----			complete
A499 Llanaelhaearn - Trallwyn				start—
A497 Broom Hall - Abererch			start-----	
A498 View Point - Llyn Gwynant			start-----	
A498 Aberglaslyn			start-----	
A4080 Maes-y-Porth - Dwyran	-----	complete		
Industrial Developments				
Y Glyn, Llanberis - provision of infrastructure on industrial estate	start----	complete		
Cibyn, Caernarfon - Provision of nursery units	start----	complete		
University Campus, Bangor - provision of science enterprise units	-----	complete		
Glanadda Industrial Estate, Bangor - Provision of infrastructure and roads	-----	complete		
Cibyn, Caernarfon, completion of infrastructure/roads			start----	complete
Llangefni, Workshop units	start----	complete		
Anglesey, Training Initiatives	start-----			
Anglesey, Workshop units in villages	start-----			
Convent Holyhead, redevelopment			complete	
Trawsfynydd Power station, Research study into the effects of closure /feasibility study of new developments	ongoing-----			
Glynllifon, Interpretive and workshop facilities	start-----			complete
Tourism				
Llechwedd, Land reclamation scheme				start—
Glyn Rhonwy, Llanberis, derelict land reclamation and provision of infrastructure for tourism/leisure development	ongoing-----			
Hirael Bay Bangor, reclamation and preliminary work to facilitate the development of yacht haven/redevelopment of existing maritime industry	start-----			

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (contd)				
Llandegai, development of strategic tourist information/interpretative centre				start—
Bangor & Caernarfon multi-storey car parks				start—
Bangor, Development of regional sports facilities				start—
Victoria Dock, Caernarfon, Preliminary works relating to future tourism based redevelopment			start—	-----
Arfon Borough, environmental and other improvement schemes	ongoing—	-----		
Llwyn Isaf Refuse Pulverisor	-----	complete		
Pwllheli Leisure Centre	-----	complete		
Pwllheli Harbour	-----		complete	
Anglesey, Museum/Gallery			complete	
Llanfairpwll Station		complete		
Anglesey, Refuse Pulverisor	-----	complete		
Holyhead, Country Park	start—	-----		complete
Beaumaris Leisure Centre	start—	-----	complete	
Holyhead, Marina			complete	
Holyhead development of regional Tourist Information Centre				complete
Menai Bridge, Marine Project		complete		
Anglesey, Car Parks/Picnic sites	start—	-----		
Anglesey, Slipways	start—	-----		complete
Anglesey, Coast Protection	start—	-----		
Beaumaris, Maritime Developments	start—	complete		
Anglesey, Sports Facilities	start—	-----		complete
Development of Welsh Cultural Centre, Blaenau Ffestiniog	-----		complete	
Llangefni Leisure Centre, redevelopment		start—	complete	
Glanydon land reclamation for model village development			start—	complete
Blaenau Ffestiniog, Tourism Study		complete		
Blaenau Ffestiniog, Leisure Centre (all weather facilities)	start—	complete		
Blaenau Ffestiniog, Museum (Slate Industrial and Ffestiniog Railway)		start—	complete	
Holyhead, Town Centre Improvements		start—	complete	
Amlwch, Town Centre Improvements			start—	complete
Pwllheli, Town Centre Improvements				start—
Caernarfon, Mill Lane Improvements, Phases I and II		start—	-----	complete
Llanberis, Padarn Country Park	start—	-----		
Snowdon Summit Project	-----	complete		
Water & Sewerage				
Pentir Tank water supply improvements	start—	complete		
Beddgelert Area Improvement - Phase I	start—	-----	complete	
Cwmystadrlllyn Water Treatment Works Chemical Plant		complete		
Blaenau Ffestiniog Service Reservoir	start—	-----	complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Water and Sewerage (cont'd)				
Ffestiniog Water Treatment Works Garreg Llwyd, Civil	-complete			
Cilfor new Water Treatment Works	-----	complete		
Penrhyndeudreath Service Reservoir	-----	complete		
Talwaenydd Water supply	-complete			
Trawsfynydd Water Treatment Works, Penstryd	-----	complete		
Holyhead Service Reservoir			start-----	
Alaw North Service Reservoir			start---	complete
New Penmynydd Service Reservoir				start---
New Bodafon Service Reservoir				start---
Britania Bridge to Penmynydd Trunk Main			complete	
Bangor Sewage Disposal	-----	complete		
Clynnog Outfall Improvement Works			complete	
Morfa Bychan, Land Based Works	-complete			
Gaerwen Sewage Treatment Works Extension		complete		
Penygroes Combined Sewer renewal		start---	complete	
Amlwch, Improvements to combined sewer	-----			complete
Morfa Bychan Sewerage Requisition	-complete			

Rail

Bangor Station, New Passenger & Parcels facilities	complete
Holyhead Harbour, New terminal facilities	-----complete

Electricity

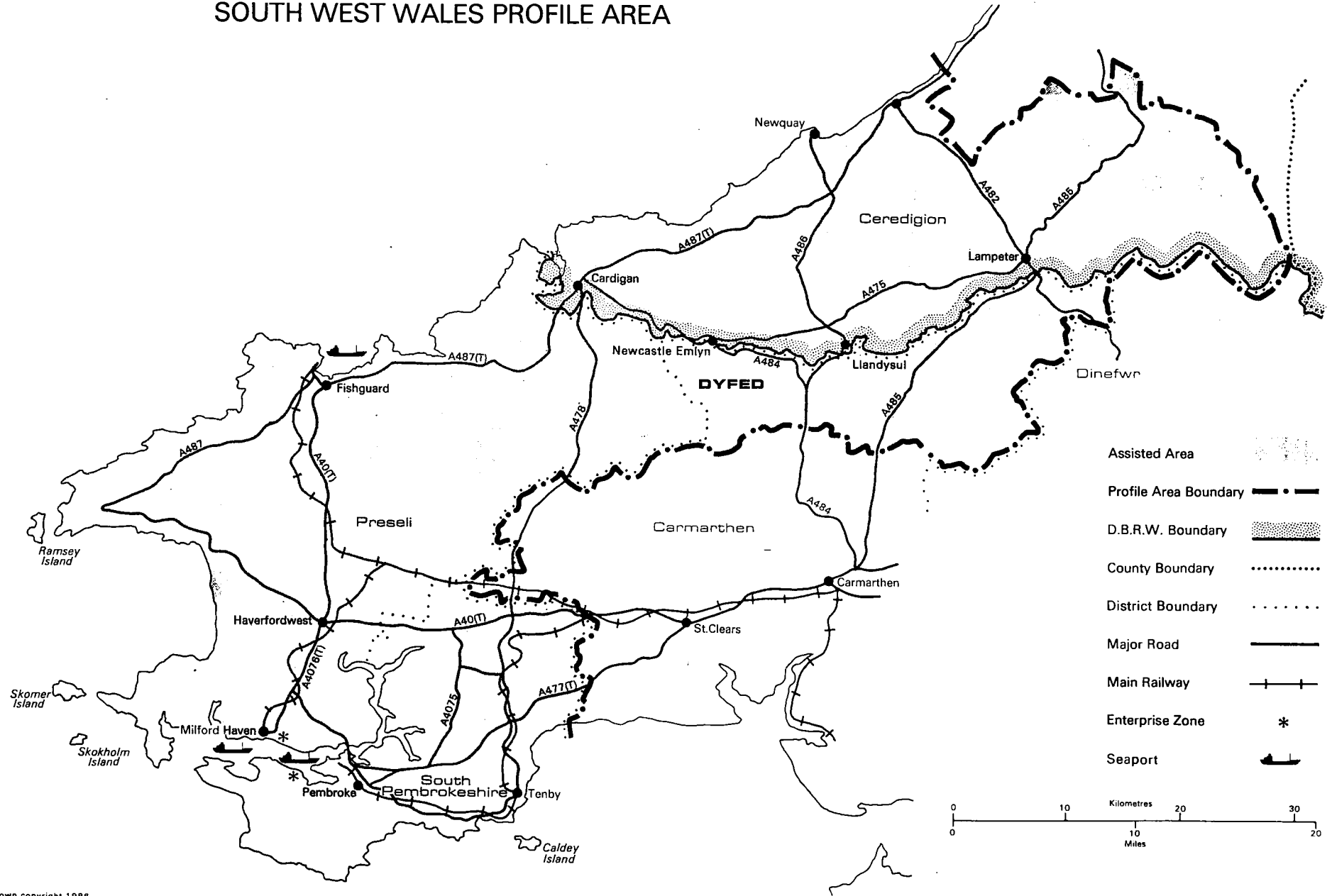
Supply Works:	
Bangor, Llandegai Industrial Estate	---complete
Anglesey, Penrhos Industrial Estate	---complete
Telecontrol to improve security of supplies	---complete
Improvements to North Wales communications system	start-----
Improvements in Protection and security of North Wales' network	ongoing-----
Renewal and refurbishment of 33kv overhead line in North Wales	ongoing-----

Gas

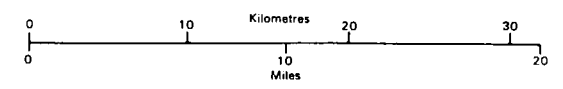
Pressure Reduction Station Work:	
Blaenau Ffestiniog	start---complete
Llanberis	start---complete

Scheme	1986/7	1987/8	1988/9	1989/90
Ports				
Holyhead Port, New Ro/Ro Berth	complete			
Holyhead Port, additional facilities	start-----			
Holyhead, Lorry Park		start-----	complete	
Holyhead, Fishing Harbour	start-----	complete		
Holyhead Harbour				
Refit Berth	-complete			
Salt Island Berth	-complete			
Salt Island Standage	start-----			complete
Customs Bond	-----	complete		
No7 Berth Piling	complete			
Major Quay Refurbishment		start-----		complete
Telecommunications				
Provision of advanced telecommunications schemes;				
local call access to PSS systems and Prestel				---complete

SOUTH WEST WALES PROFILE AREA



- Assisted Area
- Profile Area Boundary
- D.B.R.W. Boundary
- County Boundary
- District Boundary
- Major Road
- Main Railway
- Enterprise Zone
- Seaport



Assisted Area Profile**WALES - SOUTH WEST****Statistical summary**

Area (hectares)			283,581
Usually resident population			145,669
Density (persons per hectare)			0.514
Unemployment	June 1983	June 1984	June 1985
Thousands	8.1	8.5	9.4
Rate	16.9	17.6	19.5
Index (UK=100)	136.3	140.8	148.9

Employment profile 1981 (SIC 80 Divisions)

	Thousands	per cent
Agriculture, forestry and fishing	5.2	12.7
Energy and water supply	2.6	6.3
Extraction of minerals, manufacture of metals, chemicals and man-made fibres	0.3	0.7
Metal goods, engineering and vehicles	1.3	3.2
Other manufacturing	2.0	4.9
Construction	4.0	9.6
Distribution, hotels and catering, repairs	9.5	23.2
Transport and communications	2.6	6.4
Financial services	2.5	6.1
Other services	11.1	27.0
<hr/>		
TOTAL	41.2	100.0
<hr/>		

Source: Census of Population 1981

Area definition by travel-to-work area and status:

Development area: Cardigan, Lampeter and Aberaeron; South Pembrokeshire

Intermediate areas: Fishguard; Haverfordwest.

SOUTH WEST WALES

SECTION 1 - SOCIAL AND ECONOMIC ANALYSIS

A. DESCRIPTION

Geography

8D1. The Assisted Areas of South West Wales comprise the District Council areas of Preseli, South Pembrokeshire, roughly the southern half of Ceredigion and the northern part of Carmarthen within the county of Dyfed.

8D2. Much of the area, which totals about 283,581 hectares, has Development Area status; the remainder - the travel-to-work areas of Fishguard and Haverfordwest - has Intermediate Area status. It lies some 400km from London and 150km from Cardiff. It is bordered to the south and west by Cardigan Bay and the Irish Sea and to the east by the Cambrian Mountains and the rural areas of Carmarthen.

8D3. The area possesses a rich scenic variety, including 580 sq kms of the Pembrokeshire Coast National Park and some of the finest coastal scenery in the UK. Although predominantly rural, the area contains an industrialised area based on the Milford Haven Waterway.

Communications

8D4. The most important road link to the area is the A40(T) which via the A48(T) and M4 gives access to the population centres in South Wales and the national motorway network. This route continues to Fishguard Harbour in the west which links by ferry to Eire and is designated a Euro Route thus requiring improvements to a high standard. The main north-south routes are the A4076/A40 trunk road linking Milford Haven to Fishguard and the A487(T) from Fishguard to Mid and North Wales. Other important routes are the A477(T) which links Pembroke Dock with the A40 to the east and the County Road link from Pembroke Dock across the Cleddau toll bridge.

8D5. Whilst substantial improvements have been made in recent years to the A48/A40/A477 strategic routes serving the area there still remain a number of sub-standard stretches requiring upgrading. Improvement schemes are in preparation.

8D6. There are three important rail routes in the area. The most important connects the ferry port of Fishguard - becoming increasingly important as the focus for ferry services on the Southern Irish corridor with the transfer of the B & I service from Pembroke Dock - with the main urban centres in South Wales and London. Two other branch lines serve Milford Haven and Pembroke Dock. A ferry service to the Republic of Ireland operates from Fishguard. A small civil airport is located at Haverfordwest.

Population

8D7. Official population estimates are produced annually for administrative areas rather than travel-to-work areas. However, on the basis of the population distribution at the time of the last census (1981), it has been estimated that the home population of South West Wales at 1984 was 153,000 - over 6 per cent more than in 1974. The population increase was due to net inward migration. Although the numbers of children had declined, the population of working age increased by almost 10,000 over a decade to around 94,000 in 1984. Population projections are available at county level and the latest projection shows that the population of Dyfed is expected to continue to increase and that the working age population may increase by 5 per cent between 1983 and 1991.

Table 1. Population	1974	% of Total	1984	% of Total
Under working age	32.5	22.6	29.2	19.1
Working age	84.7	59.0	94.4	61.7
Over working age	26.2	18.3	29.4	19.2
		-----		-----
All ages	143.5	100.0	152.9	100.0

Table 2. Population Change **1974-1984**
South West Wales

Total Change	9.4
Natural Change	-0.6
Balance	10.0

Income

8D8. The Second Periodic Report on the Regions of Europe shows that on the basis of a synthetic index measuring the relative intensity of regional problems in the Community a group of four Welsh counties (partly included in the profile area, ie Clwyd, Dyfed, Gwynedd and Powys) are ranked 23rd in the Community out of 131 regional areas.

8D9. Average earnings are not available for the exact area of South West Wales, but the figures for Dyfed (excluding Llanelli) are shown in Table 3. These show that the average gross weekly earnings of full-time adults in this area has remained lower than both Wales and GB during the years considered, with the exception of the 1985 females figure. This was slightly higher than the Wales figure, although still well below GB.

Table 3 Average Gross Weekly Earnings of full-time adults(a)

	Males			Females		
	1977	1981	1985	1977	1981	1985
Dyfed (excl.Llanelli)	69.7	129.7	172.4	(b)	83.9	120.0
Wales	76.5	132.7	179.1	50.2	87.5	118.8
Great Britain	78.6	140.5	192.4	51.0	91.4	126.4

(a) Full-time men aged 21 and over and full-time women aged 18 and over (age at 1 January 1977 and 1 January 1981) and full-time men and women on adult rates for 1984, whose pay for the survey pay period was not affected by absence.

(b) Results are only published for areas regularly represented by 100 or more people in the sample and where the standard error of average gross weekly earnings does not exceed 4.0 per cent of the average.

Industrial Structure

8D10. The civilian working population of the area in April 1981 was 68,300, which was 5.8 per cent of the total Wales figure. The distribution of the employees in employment in the area between 1977 and 1981 changed noticeably only in two sectors. The number employed in agriculture, forestry and fishing has declined by 2.1 per cent, while those involved in construction constituted 10.3 per cent of the total employees in 1981, some 2.7 per cent more than in 1977. Nevertheless, the involvement in both these sectors is considerably higher than in both Wales and Great Britain as a whole. In contrast, the percentage of manufacturing employees is very low.

Table 4 Industrial Structure

Total percentage of Employees in Employment

	S W Wales		GB	
	1977	1981	1977	1981
Agriculture, forestry and fishing	13.9	11.8	1.7	1.6
Mining and quarrying	0.0	0.3	1.6	1.6
Metal manufacturing	0.3	0.0	2.2	1.5
Engineering and allied industries	3.4	3.5	14.7	13.2
All other manufacturing	9.2	8.3	15.4	13.6
Construction	7.6	10.3	5.6	5.3
Gas, electricity and water	3.4	3.3	1.5	1.6
Service industries	62.2	62.5	57.3	61.4

Source: Censuses of employment (excludes self employed)

B. ECONOMIC AND SOCIAL ASSESSMENT

8D11. The area's difficulties derive primarily from:

- i. a weak employment base and lack of opportunity;
- ii. infrastructure deficiencies; and also,

- iii. social problems associated with rurality/peripherality and the concentration of development.

Each of these is treated separately below.

i. **Employment**

8D12. The overall number of employees in employment in South West Wales rose by 5 per cent between 1977 and 1981, including an increase of over a thousand in the service industries. The distribution of employment between sectors, however, changed very little in this area, with over 60 per cent still reliant on the service sector.

Table 5 Employment Structure

	Employees in Employment		% change
	Thousands	1981	
	1977	1981	
Agriculture, forestry and fishing	5.3	4.7	-11
Mining and quarrying	0.0	0.1	+94
Metal manufacturing	0.1	0.0	-80
Engineering and allied industries	1.3	1.4	+ 6
All other manufacturing	3.5	3.3	- 6
Construction	2.9	4.1	+42
Gas, electricity and water	1.3	1.3	+ 2
Service industries	23.7	25.0	+ 6
	38.1	40.0	+ 5

Source: Censuses of employment (excludes self employed)

8D13. Of the 5 Welsh profile areas, South West Wales had the highest relative dependency on the 'agriculture, forestry, fishing' and 'construction' sectors. Whereas between 1977 and 1981 the numbers involved in construction had increased by over a thousand (42 per cent), there was a decrease in agriculture, forestry and fishing.

8D14. The employees in employment figure understates the number of persons working in agriculture by a substantial amount as a large proportion of this workforce is self employed - about one quarter being hired workers. In 1981 there were about 8,100 workers on 5,500 holdings which had increased to about 8,400 workers on 5,600 holdings by 1984

Table 6 Employment in Agriculture, Forestry and Fishing

	June 1981	June 1984
Whole-time		
Employees	2,100	1,500
Self employed	4,200	4,800
Total Whole-time	6,300	6,300
Part-time		
Employees	600	600
Self employed	1,200	1,500
Total Part-time	1,800	2,100
Total employees	2,800	2,100
Total self-employed	5,300	6,300
Total workers	8,100	8,400
Total holdings	5,600	5,600

Employees - hired family or other workers, salaried managers
 Self-employed - farmers, partners and directors
 Excluded - spouses of farmers, partners and directors, casual workers.

8D15. The manufacturing sector has remained a relatively small provider of job opportunities and the level of employment in manufacturing has fallen since 1981.

8D16. There have been redundancies at a number of manufacturing plants in the area. But conversely, there have been job gains at others and the overall level of employment at existing plants has not declined significantly. However, manufacturing plants which shut down completely resulted in the loss of over 600 jobs, equivalent to 15 per cent of 1981 employment in manufacturing. The area failed to attract new full time industrial investment and new manufacturing plants known to have opened in the area since May 1981 provided fewer than 100 jobs.

8D17. The main industries are clothing, mechanical engineering, food processing, paper, printing and publishing, and timber and wooden furniture industries. The food processing and clothing industries are dominated by a few large plants.

8D18. Outside the manufacturing sector there have been significant job losses in oil refining. This was largely the result of the closure of one of the refineries. The remaining refineries are very major employers.

Activity Rates

8D19. South West Wales combines a relatively high male economic activity rate, in Welsh terms, with a very low female rate. The latter is in fact over 12 per cent lower than the GB figure of 60.9 per cent. The male activity rate is also lower than the GB rate but by only 1.6 per cent.

Seasonal Unemployment

8D20. The figures for unemployment in December 1983 and 1985 illustrate the problems of the South West Wales area as regards seasonal unemployment. Only in the Haverfordwest TTWA area is the December rate less than 3-4 per cent worse than the June unemployment rate in what is already an area of high unemployment. The male rate in December 1985, in Lampeter and Aberaeron TTWA was in fact over 5 per cent above the June rate.

Table 7 Unemployment

Travel to Work areas	1983*			1985		
	Total number	Total %	Male %	Total number	Total %	Male %
June						
Cardigan	1,050	17.6	18.6	1,431	22.8	23.1
Fishguard	446	14.3	15.0	627	20.0	20.2
Haverfordwest	3,526	16.8	21.0	3,661	17.6	21.2
Lampeter & Aberaeron	792	17.7	19.5	985	21.5	23.4
South Pembrokeshire	2,300	17.0	18.4	2,706	20.1	21.7
December						
Cardigan	1,329	22.3	23.2	1,684	26.8	26.5
Fishguard	510	16.4	15.4	746	23.8	24.0
Haverfordwest	3,697	17.6	21.7	3,919	18.8	22.8
Lampeter & Aberaeron	923	20.6	22.0	1,183	25.8	28.7
South Pembrokeshire	2,736	20.3	20.4	3,276	24.4	24.3

* Figures affected by statistical base change due to 1983 Budget measures

8D21. Although in terms of numbers South West Wales had fairly low unemployment - less than 10,000 - in percentage terms the area's already poor position deteriorated quite markedly between June 1983 and June 1985. The overall rate for the area increased from 16.9 per cent to 19.5 per cent, almost 50 per cent higher than the UK unemployment rate. By June 1985, all the constituent travel-to-work areas had male unemployment rates above 20 per cent and only in the Haverfordwest area was the 'all persons' rate lower than 20 per cent.

8D22. There was also a very large increase in the numbers of long-term unemployed ie those out of work for a year or more. During the twelve months to June 1985 the numbers had increased by over 600 (18.5 per cent) to almost 4,000.

ii. Infrastructure

8D23. The full potential of direct measures to improve the area's underdeveloped economy will not be realised without complementary efforts to upgrade communications and the water, sewerage, fuel and power services which support manufacturing and service industry. The main problems are outlined below:

Communications

8D24. Although the capacity of the roads is generally adequate for normal traffic volumes, substantially increased volumes of tourist traffic do create problems which are exacerbated by poor alignment, substandard widths, inadequate visibility, excessive gradients and weight restrictions on bridges. Additional investment is accordingly needed on minor roads in the area.

8D25. The rail services and network are also limited. There are only two daily rail services to Fishguard. More frequent local services operate between Milford Haven, Pembroke Dock and Swansea. One daily inter city service operates from Milford Haven and Haverfordwest to London.

8D26. Haverfordwest airport is small and provides no scheduled air services. The area's three ports are part of the UK's west coast port facilities and make an important contribution to UK trade despite set backs

at Milford Haven due to the contraction of the oil industry which have reduced the port's oil traffic.

Other Services

8D27. The provision of adequate water and sewerage infrastructure is a considerable task in this area and suffers from all the problems consequent on rurality - the high costs entailed in providing the necessary infrastructure to remote communities and small townships - compounded not only by a significant tourist industry but also by the deep water harbour facility at Milford Haven. The capital investment required is in hand to provide the remaining small centres of population with the necessary infrastructure to support the growth in tourism and ensure adequate facilities for industry on a wider scale.

8D28. Welsh waste disposal activities are on a small scale and individual district councils are finding increasingly that new sites are difficult to find and expensive to develop to basic standards of pollution control and amenity protection. Local Authority waste disposal sites could, in certain circumstances, with the agreement of the Water Authority, be adapted to receive a wide range of wastes, including industrial wastes. It is now generally recognised that such facilities are an essential support for industry.

8D29. In general there is adequate capacity for present electricity demands but this capacity is not necessarily in new development areas or in the areas where future development is likely. Some parts of the distribution system are old and some vulnerable to storm damage. Extensive rolling programmes of modernisation and refurbishment are already underway and will need to continue. Other major investment may be required to meet load growth resulting from new industrial or other developments. Gas supplies in the area suffer more than electricity from the problems of rurality. Demand continues to grow and continued investment will be required to boost supplies if there is to be expansion beyond the area's centres of population. Investment is also required in telecommunications in the profile area in order to meet the needs of local industry and assist in making the area more attractive to incoming industry. The DBRW's investment programme (described at paragraph 8F58) to provide advanced telecommunications systems will benefit the Ceredigion part of the South West Wales profile area.

iii. Social

8D30. The social infrastructure must be improved in order to provide for the establishment of new industry and for the maintenance and growth of communities and economic centres. Much of the fabric is old and in need of modernisation - housing, schools and community facilities and there is therefore a need for capital investment for replacement and improvement.

C. PROSPECTS

8D31. Although these have been set-backs in the oil industry, the Milford Haven Waterway continues in its strategic significance as a focus for employment prospects in the area, particularly for industrial and manufacturing projects alongside oil and dock facilities. Hopes continue for the potential development of Celtic Sea oil resources, and associated employment in oil; construction and ancilliary industries. Concomitant improvements to infrastructure are required to keep in step with programmed and anticipated developments.

8D32. Tourism and agriculture continue also to be important to employment in the area despite the set backs to employment and income represented by the introduction of EC milk quotas.

8D33. With the deteriorating grave unemployment problem, the need to develop the area's economic base is now more pronounced, especially in the light of the projected increase in working age population of 5 per cent between 1983 and 1991. Additional employment opportunities must be created to prevent the present unacceptably high levels of unemployment rising further.

SECTION 2 - DEVELOPMENT OBJECTIVES

8D34. Assessment of the area's economy demonstrates that it is an area with problems which have originated from rurality, relative peripherality and suffers from over-dependence on the service and agricultural sectors with a relatively underdeveloped manufacturing sector. There is potential for growth but with development as yet remaining narrowly based both geographically and sectorally. Change - for example the introduction of EC milk quotas - can therefore cause severe dislocation. The overriding

objective is to create a diverse and stable industrial structure and thus reduce unemployment in the area. Particular long term strategic objectives are shown below:

A. ECONOMIC

- i. to continue to stimulate investment in the area;
- ii. to encourage the attraction of mobile industrial projects from other parts of the UK and abroad to sites in the Milford Haven Waterway Enterprise Zone and other sites throughout the profile area;
- iii. to encourage the formation and expansion of small firms and indigenous industry;
- iv. to encourage the effective exploitation of indigenous resources, including agriculture, fishing and petrochemicals; with a particular view to encouraging the further development of agricultural and related industries so expanding current levels of employment and income and facilitating the capacity to adapt to change;
- v. to encourage greater innovative activity;
- vi. to encourage the growth of existing commercial and economic centres.
- vii. to teach and improve skills through training programmes;
- viii. to encourage the expansion of the tourist industry through the development and provision of accommodation and a wider range of facilities, while avoiding over saturation in certain sectors and localities and recognising the need to adapt to changing requirements;

B. DIRECT INFRASTRUCTURE

- i. to safeguard and develop transportation facilities - road, rail, ports and public transport - to prevent and reverse economic decline;
- ii. to improve communications to the major population centres in Industrial South Wales and with the UK's strategic communications network;
- iii. to ensure good access for industrial and commercial traffic to areas of industrial development, particularly the Milford Haven Waterway Enterprise Zone and the petrochemicals plants at Milford Haven and to the ferry ports at Fishguard and Pembroke Dock;
- iv. to facilitate the movement of tourist, agricultural and industrial traffic by road improvements 'at selected localities;
- v. to maintain and improve all aspects of the support infrastructure, including water, sewerage, flood protection, waste disposal, electricity, gas telecommunications and the conversion of redundant buildings to productive use associated with job creation, both to rectify inadequate services and to cater for the changing needs of industry.

C. SOCIAL INFRASTRUCTURE

to protect and improve the standards of the social infrastructure to facilitate the maintenance and growth of existing communities and the encouragement of inward investment.

SECTION 3 - DEVELOPMENT MEASURES

8D35. The measures outlined illustrate the continuing work being undertaken in a bid to meet the objectives for the economic development of South West Wales. European grant aid has been of considerable benefit in developing the infrastructure, industry and resources of the profile area. A list of major schemes which have been assisted under the ERDF in recent years is at Appendix 1. Figures for ESF and FEOGA aid are not available

for South West Wales but the area has benefitted from these aids and EC aid on supplementary measures.

A. ECONOMIC

Financial Assistance

8D36. Financial assistance to industry continues to be important in encouraging the development of industry, in particular, growth of small businesses and the attraction of mobile industrial projects. Direct financial assistance is made available by central government through the availability of Regional Development Grants and Selective Financial Assistance. In 1983/84 and 1984/85 payments of old-style Regional Development Grant of £25,000 and over in South West Wales had a total value of £24.459 million. Offers of Regional Selective Assistance accepted in 1983/84 and 1984/85 totalled some £1.793 million.

8D37. In addition, agencies in the area such as the Welsh Development Agency, Development Board for Rural Wales (Mid Wales Development), Wales Tourist Board, and also the local authorities, stimulate industry by the provision of equity capital, loans, grants and promotional work. The Urban Programme and Urban Development Grant scheme provide financial assistance for economic projects by means of a 75 per cent grant from Central Government to local authorities for expenditure they incur on approved schemes. For 1986/87 schemes which are directed at economic and social regeneration, especially those encouraging the creation of small business ventures and jobs, are particularly favoured and under the urban programme over £0.8 million has been allocated to economic schemes in the area. Since the introduction in 1982 of the Urban Development Grant Scheme, grants totalling some £0.25 million have been awarded to local authorities to help them bring forward economic projects in the area.

Industrial Sites/Factory building

8D38. The Welsh Development Agency has aimed to stimulate light industry, recognising the effects of the contraction of the oil refineries, through the provision of small industrial estates at Fishguard, Haverfordwest, Llandysul, Llanybydder, Milford Haven, and Pembroke Dock. On these sites the Agency has provided 121,000 sq ft of factory space in some 39 units.

The Agency has also built 17 units, a total of 32,250 sq ft, in sizes ranging from 750 sq ft up to 4,500 sq ft on a new estate at Tenby in order to encourage industrial development and create full time jobs in this area of seasonal employment. Future plans include a feasibility study into refurbishment projects at Pembroke Dock, the construction of further small units at Pembroke Dock and small scale factory provision at industrial estates in the area in conjunction with the private sector and other agencies and public authorities.

8D39. The Development Board for Rural Wales, which operates in Ceredigion, holds 52 advance factories totalling 104,700 sq ft (providing jobs for about 227 people) in Cardigan, Felinfach and Lampeter with a further 2 units totalling 10,000 sq ft under construction.

8D40. The local authorities have constructed, with assistance from the ERDF, nursery units to foster small locally-based industry at a variety of localities including Haverfordwest and Newcastle Emlyn. In addition the local authorities have provided nursery units in the Milford Haven Waterway Enterprise Zone. Future plans include further nursery units at Newcastle Emlyn, Waterston, Llandysul and Llanybydder.

Enterprise Zone

8D41. The Milford Haven Waterway Enterprise Zone became operational on 24 April 1984, making available a large number and variety of greenfield and waterfront sites together with a range of buildings of different sizes. The local authorities have undertaken an ongoing development programme involving land acquisition and provision of infrastructure and units. Progress reports from the zone manager indicate that between designation and the end of June 1985, 43 firms had become established in the zone and 148 net jobs had been created. Further major investment is planned within the programme period on the improvement of dock facilities and in the provision of further industrial units in the Zone.

Oil Industry

8D42. The three oil refineries situated in the Milford Haven area - Gulf, Amoco and Texaco - have not been working to capacity for some time because of the state of the market, and, the Esso plant closed in 1983 because of

lack of demand and surplus oil capacity. Texaco have maintained substantial investments in recent years - a £400 million+ catalytic cracking unit, developed jointly with Gulf and commissioned in 1982, a £20 million visbreaker in 1984 and more recently an £85 million catalytic reforming unit designed to increase the octane rating of petrol and reduce the need for lead based additives. Other than the joint venture with Texaco there have been no major investments at the Gulf refinery over the same period. Gulf's petrochemical plant at Milford Haven closed during 1982 with 92 redundancies but their share in the catalytic cracking plant is thought to make the refinery's future more secure. Amoco's most recent investment was a £94 million catalytic cracking plant completed in 1981.

8D43. It is possible that Amoco, in conjunction with Murco, could decide to build a visbreaker at Milford Haven. However, no formal decisions have yet been taken.

8D44. A number of firms have developed to meet the demands of the oil refineries and, in a more limited way, the North Sea offshore oil industry as well as potential Celtic Sea oil and gas and there are a few relatively large manufacturing establishments which are not dependent upon local linkages. They are engaged in the manufacture of such diverse products as plastic seals, domestic heating appliances and industrial fasteners.

Stimulating Innovative Activity - Small Businesses

8D45. The local authorities, individually and through a joint industrial development committee, are very active in promoting the creation and expansion of new small businesses. Their efforts are assisted by business advisory services provided by the Development Board for Rural Wales and the Welsh Development Agency, which operates the Business Development Unit and administers the Small Firms Service in association with the Department of Employment. The local authorities fund and implement an ongoing Small Firms Wages Subsidy Scheme, with European Social Fund support, and report that the scheme is very well received by the local small business community. At Newcastle Emlyn, an integrated business centre has been established to serve the Teifi Valley and surrounding rural area, as a joint venture between Dyfed County Council, the Welsh Development Agency, the Development Board for Rural Wales, the Manpower Services Commission and Antur Teifi. The local authorities also support local enterprise agencies

such as the Pembrokeshire Business Initiative. Dyfed County Council plans the provision of 10,000 sq ft of workshop units at Newcastle Emlyn for the new technology and agrifood industries; to operate alongside an Open Tech unit which has been established in conjunction with Technical and Vocational Education Initiative courses. South Pembrokeshire District Council plans the development of a number of units for small businesses, at a variety of localities, to include managed workshops for light and service industries, hi-tech industries and small engineering businesses. The Council has also provided an Information Technology Centre at Pembroke Dock. Preseli District Council have also provided a significant amount of premises for small businesses and have further premises planned for development during the programme period, particularly within the Milford Haven Waterway Enterprise Zone.

Training Programmes

8D46. Training of the workforce by industry is supplemented by central and local government. The training and vocational education programmes provided by the Manpower Services Commission are now more flexible and more responsive to the changing needs of industry. There has been a move away from long duration, skillcentre based training for unemployed people. The MSC is acting more as a catalyst providing direct pump priming support to industry, including small businesses, both on employer premises and at local institutes of further and higher education. Local authorities complement such training by acting as YTS managing agents and as sponsors of Community Programme Schemes. Local Authority funding helped to establish the Information Technology Centre at Pembroke Dock. Dyfed Local Education Authority started a scheme in September 1985 under the MSC's Technical and Vocational Education Initiative, with the aim of improving the suitability of training for 14 to 18 year olds.

Tourism

8D47. The scenic beauty of the Pembrokeshire coast and its beaches are a great attraction to tourists. A recently completed study by independent consultants, commissioned jointly by Dyfed County Council, the Wales Tourist Board, the Welsh Development Agency and the Development Board for Rural Wales and part-funded by the ERDF, has identified a development strategy for Dyfed which concentrates on the further development of

attractions, tourist accommodation and marinas. Planning priorities on the basis of this strategy are currently at an early stage but a number of projects have been identified; with an overall cost exceeding £4.5 million - some of which would be met by the private sector - aimed at developing new business in growth markets, defending the area's share of the domestic main holiday market and gaining a greater share of the additional holiday and short break market. The District Councils have a number of localised developmental objectives for tourism which, taken together, aim at broadening and strengthening the area's attractiveness to tourists. For example, South Pembrokeshire District Council aims to provide a diversification of facilities including all weather attractions and new marketing initiatives aimed at extending the tourist season. Projects being identified for possible development include weather independent and heritage based facilities and additional marina and accommodation facilities. Supporting investment including improvements in sewage, refuse disposal, coast defence and cliff stabilisation will also be required. Preseli District Council aim to further develop the tourism potential of the Milford Haven Waterway and to undertake the development of a culturally-based tourist facility at Cilgerran.

Fishing industry

8D48. The Management of the Milford Haven Enterprise Zone is supporting proposals to develop the fishing industry at Milford Haven. These proposals, also including the private sector, aim to establish a major fish dealing and processing facility.

8D49. The indigenous fishing fleet at Milford Haven has traditionally been very important to the local economy but in recent years has suffered decline partly because of operating difficulties including reduced catch rates, low fish prices and high fuel costs. There are currently 7 local Mid Water trawlers and 2 long liners operating from the Port, landing in 1984 1400 tonnes of fish (mainly cod, ray, sole, plaice and hake) valued at £1.2 million. It is difficult to assess with any accuracy the long term prospects of development for the local fleet because this depends on many variable factors. However their prospects, in the main, for the near future do not appear to be good and any improvement is only likely to be achieved at the cost of considerable investment. On the other hand proposals (outlined at 8D46) could if they come to fruition make Milford

Haven an important port for handling fish transshipment by non-local vessels to other areas of the UK and the EC. The fishing industry in the rest of South West Wales comprises around 50 under 12 metre vessels fishing mainly for lobsters and crabs operated on a cottage industry basis. The likely stocks position will tend to inhibit further development. There are good prospects for developing fish farming in the area. In particular there are new initiatives for rearing salmon in captivity in Milford Haven and nearby coastal waters. There is also some potential for developing the shellfish industry, eg oyster cultivation. Investment is being planned with public sector (including FEOGA) support in these sectors.

B. DIRECT INFRASTRUCTURE

Communications

8D50. The motorway from London across South Wales terminates outside the area. Major improvements to the A48, A40 and A477 trunk roads are being undertaken with the aims of reducing the problems caused by the area's peripherality and encouraging tourist and industrial development in the sub-region. A number of major regional highway schemes are planned by the County Council for the RDP period, together with a large number of smaller, complementary schemes linking the principal industrial and tourist areas to the main network. Schemes at Pembroke Dock and at Fishguard are designed to ease the severe traffic problems of these two international ferry ports. A major investigation of the highway needs of Haverfordwest has been undertaken, and several trunk and county road schemes have been designed to relieve the congested town centre of through traffic. British Rail plan to improve the rail route to Milford Haven which will benefit freight users (especially oil) and local passengers. The scheme, with an estimated cost of £340,000, will strengthen the competitiveness of Milford Haven as a freight terminal and assist the maintenance of employment at the Docks. In addition a major investment programme with a total cost of over £6½ million is planned at Milford Haven docks for the programme period. The programme will include infrastructure works and works to the benefit of the fishing industry.

Support Services

8D51. The beaches of the area are of particular beauty and importance to tourism. Improvements to sewage disposal facilities have taken place with ERDF assistance in order to protect these natural features of the coast - for example at Tenby. A complementary major (£1 million plan) scheme is planned in the Amroth Sumerhill area. Work continues on the regional water supply scheme at Llechryd which will ease the difficulties experienced by large rural areas and will assist the tourist industry. Other planned improvements in the area involving refuse disposal, coast protection and water supply/sewerage will also benefit the tourist industry. The District Councils also have other infrastructure schemes planned, to support tourism, which will involve the provision of additional and improved car parking, town centre improvements to accessibility, the provision of public toilets and general environmental improvements. Other planned schemes during the programme period will improve the water supply for industry at a total cost of some £5.5 million. Electricity supply reinforcement and other improvements to meet increased industrial and domestic demand is planned at a number of localities.

8D52. Increased demand for gas supplies in SW Wales has led to the reinforcement of the gas transmission system which is continuing with the help of ERDF aid. The main reinforcement project planned in SW Wales is in the Lampeter area at an estimated cost of £0.5 million, but the ability to meet any growth in demand in the area will also depend on major expenditure planned for Industrial South Wales. A rolling programme of modernisation and reinforcement of the electricity network and general investment in communication and remote control systems is proceeding throughout the area. This is aimed at improving the performance of networks and adding flexibility to be able to meet development as and where it occurs.

C. SOCIAL INFRASTRUCTURE

8D53. Work to protect and improve the social and environmental infrastructure is vital if industrialists are to be encouraged to invest and if communities are to be maintained and grow. Standards of education and training have to be maintained in order to provide a workforce capable of responding to changing needs. Schemes designed to assist in improving the social framework of the area are also eligible for assistance under the

urban programme in respect of which central government provides grants of 75 per cent on approved local authority expenditure. The Development Board for Rural Wales, the local authorities and Housing associations provide housing specifically for key industrial workers at a variety of localities. In addition the DBRW's social grant scheme assists schemes of benefit to local communities.

8D54. Appendix 2 tabulates some of the main projects being undertaken in South West Wales during the Programme period in order to further the objectives outlined in Section 2. The list indicates current projections and priorities but is not exhaustive.

SECTION 4 - IMPLEMENTATION AND CO-ORDINATION OF INVESTMENT

Financial Resources

8D55. The following estimates of capital expenditure in the Profile Area over the programme period are based upon project costs as identified by the local authorities and public bodies which contributed to the compilation of the programme. Practical considerations preclude the preparation of accurate estimates for every project listed in the Appendix and the totals are therefore indicative only.

	1986-87	1987-88	1988-89	1989-90
	£m	£m	£m	£m
Factory building, site development and land reclamation	1.2	1.2	1.2	1.2
Tourism	1.4	1.4	1.4	1.4
Roads	2.5	3.1	2.4	2.0
Rail	0	0.3	0	0
Ports	3.9	3.3	0.8	0.4
Water, sewerage and flood protection	2.1	1.9	2.3	0.5
Electricity	3.0	2.7	2.8	2.7
Gas	0	0	0	0.3

Notes: Factory building, site development and land reclamation - excludes expenditure by Welsh Development Agency

Tourism - excludes Wales Tourist Board Grant

Roads - estimated expenditure on trunk roads, and on county roads over £5 million. Estimates provided by Welsh Office.

Coordination of investment

8D56. The Dyfed County Structure Plan, approved by the Secretary of State in July 1983, contains policies and general proposals for the development of the profile area until 1991. Within this overall framework local implementation programmes are developed and undertaken by both County and District Councils. The Development Board for Rural Wales, which works in Ceredigion - the north of the profile area - formally consults local authorities on its policies and development proposals. Its capital programmes - mainly factory building - are prepared in consultation with the local authorities and are submitted to the Secretary of State for approval. The Welsh Development Agency's capital programmes are also subject to approval by the Secretary of State.

8D57. Co-ordination in the area includes a number of joint local authority committees - for example the Dyfed Industrial Development Committee (which also incorporates representatives of the Welsh Development Agency, Mid Wales Development and the Manpower Services Commission), the Joint Enterprise Zone Committee (which also incorporates the Welsh Development Agency and Wales Tourist Board, and the South Wales Tourism Council (which also incorporates the Wales Tourist Board and private sector interests).

8D58. Recent and continuing road improvements are improving access into the profile area - particularly via the M4 motorway. Major by-passes are planned for Haverfordwest, Whitland and Cardigan. Further investment in the infrastructure to stimulate manufacturing industry and the growth of tourism are immediate and medium term goals in order to sustain and further diversify the economic base.

8D59. South Pembrokeshire and Preseli District Council, together with Dyfed County Council, are formulating an approach to the EEC to establish a special package of assistance to industry and commerce in areas where oil refinery closures have a major economic effect on communities which have been dependent on direct employment and the associated employment in related construction and service industries.

8D60. The County Councils of Dyfed, Powys and Gwynedd have been co-sponsors of a study, funded with assistance from the EC Regional Fund, to examine the scope for integrated action in the area. The study is due to be completed in 1986. In particular, it will consider the potential for further development of Agriculture, Forestry, Fisheries, and related industries and will also examine the prospects for Tourism and future Manufacturing Industries. The study is also likely to highlight major problems in communications development including the need for access to more advanced telecommunications systems which have particular relevance to the generation of small businesses in rural areas. Proposals for the co-ordination of policies and investment will also be advanced.

ERDF AID TO SOUTH WEST WALES

Indicative Projects which received ERDF aid in recent years.
(Paragraph 8D33 refers)

Authority	Project	Eligible Cost £	Grant Commitment £
Industrial Development			
South Pembs DC	Waterloo Industrial Estate, Pembroke Dock	419,100	125,730
Preseli DC (2 allocations)	Honeyborough Industrial Estate	223,750	99,389
Land Authority for Wales	Kingswood Pill Pembroke Dock Infrastructure	306,000	153,000
Road Communications			
Dyfed CC	A482 Coedeiddig bends Lampeter	432,480	129,744
Dyfed CC	B4328 Trevaughan Bridge	527,350	263,675
Tourism			
Preseli DC	Westfield Pill Marina Milford Haven	768,300	230,400
South Pembs DC	Tenby Harbour restoration works	157,500	78,750
Public Utilities			
Welsh Water Authority	Synod Inn Reservoir	547,000	164,100
Welsh Water Authority	Llechryd regional scheme Stage 2A	1,497,000	449,100
Welsh Water Authority	Tenby sewerage and Sewage disposal scheme	2,707,300	812,190
Wales Gas	South West Wales reinforcement	6,392,000	1,917,600
Transport			
Sealink Ferries	Fishguard Harbour, facilities for passenger and vehicle traffic	105,000	31,500

SOUTH WEST WALES INDICATIVE MAJOR INFRASTRUCTURE DEVELOPMENTS 1986-90
(PARAGRAPH 8D52 REFERS)

Scheme	1986/7	1987/8	1988/9	1989/90
Trunk Roads				
A40 Pengawse Hill Diversion	complete			
A40 Haverfordwest Eastern By-Pass and Relief Roads		start-----		
A487 Cardigan By-Pass				start-----
Principal Roads				
A475 Llanwnen Bridge	complete			
A484 Aberarad Slip	start ----	complete		
A484 Graig Street, Newcastle Emlyn	start -----		complete	
A484 Llangeler by-pass		start -----		
A485 Pencarreg - Lampeter	complete			
A485 Tireithin - Castell Flemish	complete			
A485 Llangybi Village		start ----	complete	
A486 Ffostrasol Village	start ----	complete		
A487 Old Bridge Relief Road, Haverfordwest	start-----		complete	
A487 Dyffryn By-Pass	start -----			
A487 Nine Wells, Solva		start ----	complete	
A487 Croesgoch		start -----		complete
A4075 Pennybridge, Pembroke	complete			
A4139 Route 9, Pembroke	start -----			complete
Other Roads				
B4320 Bridgend Terrace, Pembroke	complete			
B4322 Top Road, Pembroke		start ----	complete	
B4330 Calfields - Kilns, Haverfordwest		start ----	complete	
C3001 Herbrandston School Diversion	complete			
C3001 Silverstream			start -----	
C3015 Wiseman's Bridge	start ----	complete		
C3020 Freshwater East	start -----			complete
C3035 Scoveston - Beaconsing			start ----	complete
C3076 Stammers Road, Saundersfoot	complete			
Tourism				
Brunel Quay, (Enterprise Zone)				
Crafts Units and Interpretive Centre		start ----	complete	
Cilgerran, Coracle Centre	start -----	complete		
Haverfordwest Town Centre Development	start -----		complete	
Traeth Gwyn, Coast Protection	start -----		complete	
Cardigan Sports Hall			complete	
Ceredigion, Refuse Tip		complete		
Tenby Harbour, improvements	start -----			
Pembroke Maritime Heritage developments	start -----		complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (Cont'd)				
Pembroke Dock Marina		start	-----	complete
South Pembrokeshire, coastal defence projects	start	-----		
Stepaside Heritage project	start	-----		
Tenby, cliff stabilization research study	start	-----	complete	
South Pembrokeshire environmental improvements	start	-----		
South Pembrokeshire Defensible Barracks, research study	complete			
Barnlake, (Milford Haven Waterway Enterprise Zone) Leisure complex	start	-----	complete	
South Pembrokeshire, Tourism technical and feasibility studies	start	-----		
Industrial Developments				
Milford Haven Waterway Enterprise Zone:				
Fish Centre, Milford Docks (8,700 sq ft)		complete		
Milford Docks, redevelopment	-----	complete		
Honeyborough, Infrastructure Works Phase III	complete			
Brunel Quay, extension to sewers	-----			complete
Thornton, Access Road and Services	start	-----	complete	
Brunel Quay/Ferry Yard, Land Acquisition			complete	
Bierspool Estate, infrastructure	complete			
Waterloo Estate, infrastructure phase III	complete			
Tenby, Salterns Estate, infrastructure		complete		
Llanion Park, Pembroke Dock, Managed Nursery Workshops	complete			
Bierspool, Pembroke Dock Hi-Tech Nursery Units,	complete			
Waterloo Estate, Pembroke Dock, Engineering Nursery Units	complete			
Industrial Estate Developments and provision of small nursery units:		start	-----	
Newcastle Emlyn				
Pontweli/Llandysul				
Llanybydder				
Pencader				
Cardigan, Industrial Estate and Advance factory development	ongoing	-----		
Development of Regional Agricultural Trading Centre, feasibility study and possible development	ongoing	-----		

Scheme	1986/7	1987/8	1988/9	1989/90
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Water and Sewerage

Llechryd Regional Scheme:

Beulah Main			start -----	complete
Aberbanc Service Reservoir		start -----	complete	
Synod Inn	-----	complete		
Johnston to Milford Haven Supply		complete		
Templeton Service Reservoir	complete			
Canaston/Greenhill Area - Water Supply Augmentation			complete	
Milton Borehole - Pumps & Water Treatment Works	start -----		complete	
Lampeter Sewerage & Sewage Disposal	-----	complete		
Fishguard Disposal - Phase II & III	-----			complete
Amroth/Summerhill Sewage Treatment Works & Sewerage Requisition	-----	complete		
Tenby Lifeboat Pumping Station and Sea Outfall	-----	complete		
Rhydlewis Sewage Disposal Works and Sewer Requisition	-----	complete		
Sewerage Schemes:			start -----	
Ffaldybrenin				
Llanllwni				
Rhydycymerau				
Drefach Felindre				
Llanfihangel-ar-Arth				
Nantyffin				
Water Supply Requisition Schemes:			start -----	
Blaenwaun area				
Pencader Area				
Maudsland				
Llanycrwys				
Rhydycymerau				

Rail

Modernisation of track and signalling between Clarbeston Road and Haverfordwest	complete			
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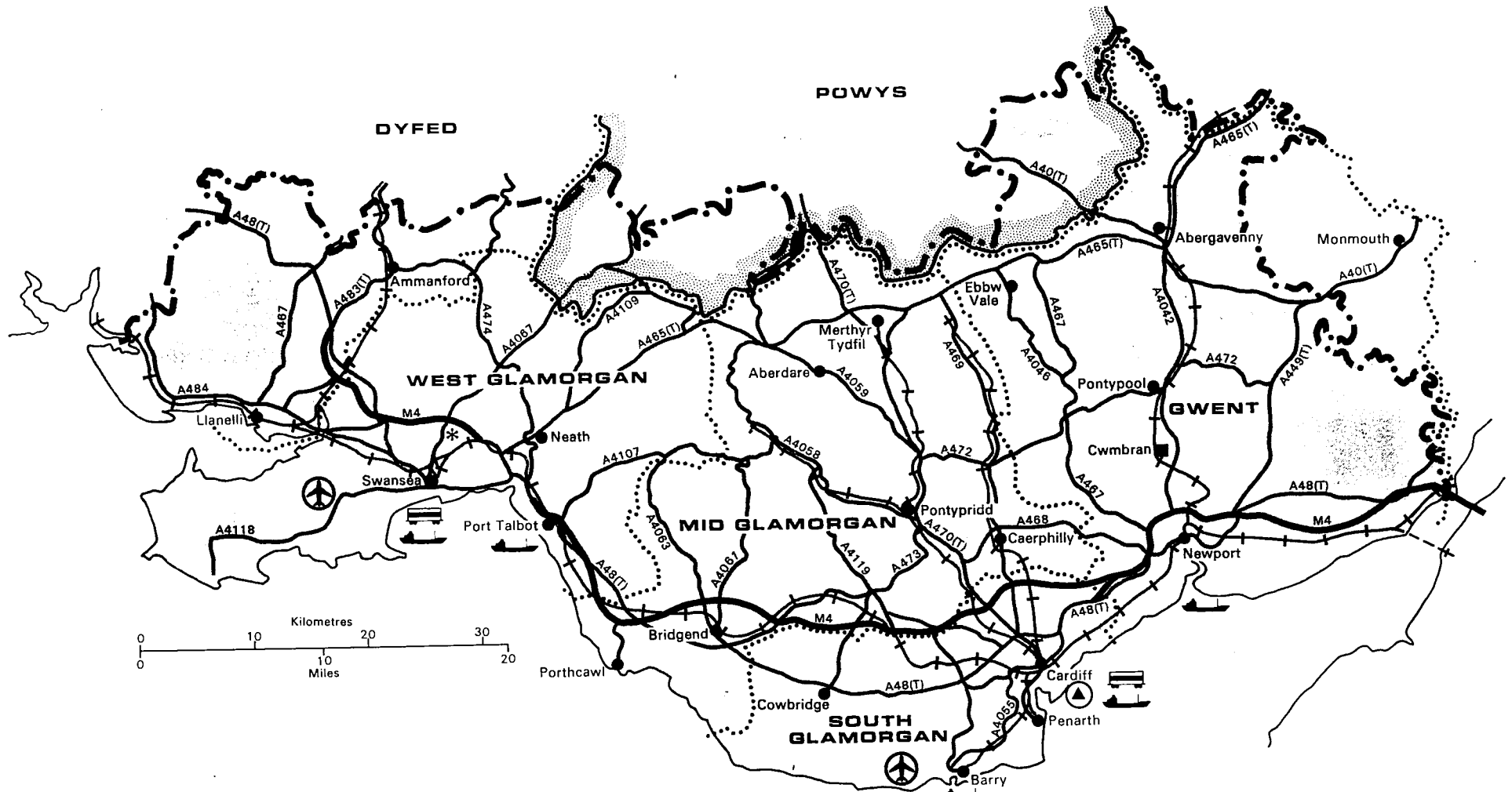
Electricity





33/11 KV Transformer Reinforcements:






Llanfihangel Ystrad	complete			
Tregaron		complete		
Aberaeron/Llanarth	start -----	complete		
Penblewin			start -----	complete
Whitland		start -----	complete	
11 KV Switchgear Changes:				
Bridell	start -----	complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Electricity (Cont'd)				
Lampeter	start	complete		
Cardigan		start	complete	
Fishguard			start	complete
Pembroke 132 KV Group Restructuring				start
Coshaston - New 33 KV Line	start	complete		
Telecontrol and Communication System - additions and improvements	ongoing	-----	-----	-----
District 11 KV and LV schemes for system reinforcement	ongoing	-----	-----	-----
Gas				
Lampeter/Llandovery/Llandeilo, reinforcement of gas supply				start
Telecommunications				
Fishguard Harbour: Telephone Exchange		complete		
Provision of advanced telecommunications schemes, local call access to PSS systems on Prestel		-----	complete	
Ports				
Fishguard Harbour: New linkspan and other terminal facilities for large multi-purpose ferry		start	-----	complete
Milford Haven Docks: Infrastructure Works-road, improvements (West side), upgrading of wharves, electricity and floodlighting		complete		
Service Base/Marine Workshop		complete		
Fish Centre		complete		
Cold Storage Unit		complete		
Offshore Dredging		complete		
Design Works		ongoing	-----	-----
Infrastructure Works (Eastern side)		complete		
Reclamation of Herring Jetty		complete		
Infrastructure Works, Phase III			complete	
Demolition of Structures			complete	
Wharf Repair/Dolphin			complete	

INDUSTRIAL SOUTH WALES PROFILE AREA



- Profile Area Boundary 
- Assisted Area 
- D.B.R.W. Boundary 
- County Boundary 

- Motorway 
- Major Road 
- Main Railway 
- New Town 
- Enterprise Zone 

- Airport 
- Freightliner Terminal 
- Seaport 
- Freeport 

Assisted Area Profile**WALES - INDUSTRIAL SOUTH****Statistical summary**

Area (hectares)			417,810
Usually resident population			1,818,700
Density (persons per hectare)			4.353
Unemployment	June 1983	June 1984	June 1985
Thousands	113.9	114.1	120.0
Rate	15.5	15.5	16.3
Index (UK=100)	125.0	124.0	124.4

Employment profile 1981 (SIC 80 Divisions)

	Thousands	per cent
Agriculture, forestry and fishing	5.4	0.8
Energy and water supply	47.9	7.4
Extraction of minerals, manufacture of metals, chemicals and man-made fibres	49.1	7.6
Metal goods, engineering and vehicles	79.4	12.3
Other manufacturing	51.6	8.0
Construction	36.2	5.6
Distribution, hotels and catering, repairs	105.0	16.2
Transport and communications	38.8	6.0
Financial services	35.4	5.5
Other services	198.9	30.7
TOTAL	647.9	100.0

Source: Census of Population 1981

Area definition by travel-to-work area and status:

Development areas : Aberdare; Blaenau Gwent and Abergavenny;
Merthyr and Rhymney; Neath and Port Talbot;
Pontypridd and Rhondda;

Intermediate areas : Bridgend; Cardiff; Llanelli; Newport;
Pontypool and Cwmbran; Swansea

INDUSTRIAL SOUTH WALES

SECTION 1 - SOCIAL AND ECONOMIC ANALYSIS

A. DESCRIPTION

Geography

8E1. Industrial South Wales includes the counties of Gwent (major part); Mid, South and West Glamorgan; the district of Llanelli and the southern parts of Carmarthen and Dinefwr in Dyfed; and the extreme southern part of the district of Brecknock in Powys.

8E2. It extends for 130km along the south coast of Wales, from Kidwelly in the west to Chepstow in the east, and up to 50km inland, where it is bounded by the Brecon Beacons and the rural areas of Dyfed. At its centre it is 250km from London.

8E3. The area covers 417,810 hectares and comprises a coastal plain, including the Vale of Glamorgan west of Cardiff, backed by deeply dissected mountainous country. The distinction between urban and rural landscape is very pronounced: densely settled industrial valleys are divided by stretches of open moorland. On the coast, stretches of open country intervene between large coastal towns and cities. There are two designated Areas of Outstanding Natural Beauty, the Gower peninsula near Swansea and the Wye Valley in the east, and a small part of the Brecon Beacons National Park in the north. In addition a small section of coastline between Forthcawl and Aberthaw has been identified by the local authorities and Countryside Commission as a Heritage Coast.

Communications

8E4. The main road routes in the area are the M4 which runs parallel to the coast and provides access via the Severn Bridge to England and the national motorway network and, in the north, the A465/A40 trunk roads. The A470, A4042 and A449 trunk roads provides the main north-south links and these are supplemented by a network of county roads some of which are important in gaining access to heavily populated valley communities eg the A467 between Newport and Brynmawr.

8E5. The area has a reasonable network of rail routes. The most important is the South Wales main line which links the coastal towns from Llanelli to Newport with London. In the west the Central Wales line links Llanelli with rural mid Wales. Rail access to the North West of England is obtained via the Newport to Crewe line. In the heart of the area is the 'Valleys network' which link the Rhondda, Taff and Rhymney Valleys to Cardiff and the coastal towns of Barry and Penarth.

8E6. The main ports are Newport, Cardiff, Barry, Port Talbot and Swansea and to a lesser extent Neath. There is another port near Neath (Briton Ferry) at which the volume of cargo has increased substantially in recent years.

8E7. There are airports at Cardiff and Swansea. Cardiff is the designated regional airport, handling international and domestic flights, and serving South Wales and the South West of England. A new heliport has recently been opened in Cardiff.

Population

8E8. In 1984 the assisted area had an estimated population of 1,842,200 - some two thirds of the population of Wales. The 1981 Census showed 41 per cent of the population concentrated around the urban areas of Cardiff (297,800), Swansea (279,200), Newport (115,900) and Rhondda (71,000).

8E9. Between 1974 and 1984 the population of this region fell by 1.2 per cent due mainly to a large decrease (17.7 per cent) in the population below working age. The population of working age increased by 30,200 (2.7 per cent) while those of pensionable age showed an increase of 8.1 per cent. Population levels in the region are still falling with an annual average loss of around 2,900 persons since 1974 due to net outward migration outweighing an average annual gain of nearly 700 persons due to natural change.

Table 1. Population - Industrial South Wales

	1974	% of total	1984	% of total
Under working age	441,000	23.6	363,100	19.7
Working age	1,114,400	59.8	1,144,600	62.1
Over working age	<u>309,500</u>	<u>16.6</u>	<u>334,500</u>	<u>18.2</u>
	1,864,900	100	1,842,200	100

Table 2. Population Change 1974-1984 - Industrial South Wales

Total Change	-22.7%
Natural Change	6.7%
Balance (including migration)	-29.4%

1983 Based population projections for the four counties indicate that if these trends continue this is the only part of Wales which will experience a decline in the working age population in the period to 1991 (of over 10,000).

Income

8E10. The Second Periodic Report on the Regions of Europe shows that on the basis of a synthetic index measuring the relative intensity of regional problems in the Community the four counties almost wholly included in the profile area (Mid, South and West Glamorgan and Gwent) are ranked 19th in the Community out of 131 regional areas.

8E11. Table 3 below demonstrates that throughout the area (excepting only South Glamorgan) average weekly earnings are below the GB average. Levels for the area overall are fairly close to the Welsh average as the area contains over 60 per cent of the civilian working population of Wales. Gwent averages and Mid Glamorgan male earnings are consistently below - in some cases, well below - even the Welsh average.

Table 3. Average Gross Weekly Earnings of full-time adults (a)

£ per week in April

	Males			Females		
	1977	1981	1985	1977	1981	1985
Gwent	77.6	126.1	175.5	49.9	86.4	116.6
Mid Glamorgan	75.4	134.4	175.2	50.7	90.5	119.5
South Glamorgan	81.2	140.2	187.8	52.3	88.7	123.1
West Glamorgan (incl Llanelli)	76.6	135.5	181.6	50.7	87.4	119.1
Wales	76.5	132.7	179.1	50.2	87.5	118.8
Great Britain	78.6	140.5	192.4	51.0	91.4	126.4

Source: New earnings survey

(a) Full-time men aged 21 and over and full-time women aged 18 and over (age at 1 January 1977 and 1 January 1981) and full-time men and women on adult rates for 1984, whose pay for the survey pay-period was not affected by absence.

Industrial Structure

8E12. The civilian working population of Industrial South Wales in April 1981 was 758,500, 64.8 per cent of the Wales total.

8E13. There was a considerable decrease in the numbers employed in the area between 1977 and 1981, as a result mainly of large decreases in the metal manufacture, engineering and other manufacturing sectors. The only sectors to show any increase were the utilities and service industries, both small gains of 1-2 per cent. The overall distribution of employees changed only slightly, however, apart from metal manufacturing which almost halved from 9.0 per cent to 5.0 per cent and services which increased its share by 6.2 per cent to 58.0 per cent. The area still retained a more 'industrialised' employment pattern than both Wales and GB despite these changes.

8E14. The continuing development and intermediate status of all but one of the travel-to-work areas in the Industrial South Wales statistical sub-division despite the recent refining process is a telling indicator of the need for assistance in this area.

8E15. The decline of the older industrial base in mining and metal manufacture has persisted and the recent spate of colliery closures will ensure a further escalation in the decline of mining employment in the area.

Table 4. Industrial Structure

Total percentage of Employees in Employment

	*Industrial S Wales		GB	
	1977	1981	1977	1981
Agriculture, forestry and fishing	0.7	0.7	1.7	1.6
Mining and quarrying	5.3	5.0	1.6	1.6
Metal manufacture	9.0	5.0	2.2	1.5
Engineering and allied industries	12.6	12.1	14.7	13.2
All other manufacturing	12.5	11.3	15.4	13.6
Construction	6.3	6.0	5.6	5.3
Gas, electricity and water	1.7	1.9	1.5	1.6
Service industries	51.8	58.0	57.3	61.4

Source: Censuses of employment (excludes self-employed)

* Defined by old (pre 1984) TTWA's excluding Monmouth TTWA

B. ECONOMIC AND SOCIAL ASSESSMENT

8E16. The main problems in the area derive primarily from:-

- i. a fundamentally weak employment base stemming from contraction in basic industries and fundamental changes in the industrial structure.
- ii. infrastructure inadequacies impeding industrial growth; and also

iii. social problems associated with the area's industrial heritage.

Each of these is treated separately below.

i. Employment

8E17 Over the years 1977 to 1981 employment in the service industries in the profile area rose from 52 per cent to 58 per cent, in contrast to all other sectors apart from the utilities, which also showed a very slight increase in employment. The metal manufacturing group lost 50 per cent of its employment, thereby falling to only 5 per cent of the area's employees in employment. The overall total of employees in employment, however, fell by 10 per cent, almost 70,000 less than in 1971. Very nearly 90 per cent of this decline was attributable to the manufacturing sector as a whole, where employment decreased by over 60,000. The metal manufacturing loss of over 30,000 jobs was the major contributor to this but the 'engineering and allied industries' (over 12,000) and the 'textiles, leather and clothing' and 'other manufacturing' groups (both over 7,000) also showed significant decreases. The fall in employment in 'textiles, leather and clothing' was 37 per cent of the 1977 employees in employment.

Table 5. Employment Structure

	Industrial South Wales*		
	Employees in Employment		
	Thousands		% Change
	1977	1981	
Agriculture, forestry & fishing	5.2	4.8	- 8
Mining and quarrying	37.6	32.0	- 15
Metal manufacture	64.2	32.0	- 50
Engineering & allied industries	89.8	77.6	- 14
All other manufacturing	89.4	72.8	- 19
Construction	45.2	38.9	- 14
Gas, electricity and water	12.0	12.3	+ 2
Service Industries	<u>369.2</u>	<u>373.5</u>	<u>+ 1</u>
All employees in employment	712.5	443.8	- 10

Source: Censuses of employment (excludes self employed)

* defined by old (pre 1984) TTWA's excluding Monmouth TTWA.

8E18. Employment in manufacturing is estimated to have fallen further to just over 150,000. The majority of job losses have been the result of continuing redundancies at existing manufacturing plants. The job losses have been spread widely across all sectors of manufacturing. An underlying reason for falling employment levels at manufacturing plants in Industrial South Wales has been the sustained effort to improve levels of productivity.

8E19. A major feature has been significant job losses at major employers, particularly continuing job losses at BSC plants, at other non-ferrous metal producers, in bulk chemicals, mechanical engineering and at more traditional producers in the electrical engineering sector, though this masks job gains at some electronics plants. There have also been job losses in the motor vehicle components sector. Sectors in which overall employment levels have been more stable are food, drink and Tobacco, Instrument Engineering and Paper, Printing and Publishing.

8E20. Job losses from the complete closure of manufacturing plants have slowed compared with the years immediately prior to 1981. However, jobs lost as a result of complete plant closures are still greater by a factor of 3 than job gains from new plant openings. The 250 plants which have closed since mid 1981 involved the loss of over 22,000 job opportunities. This compares with the 6,700 new jobs now provided at the 150-plus manufacturing plants known to have opened since mid 1981.

8E21. Significant major closures and rundowns have included the Burry Port Power Station closed in 1983 with a loss of 230 jobs (the Royal Naval Stores Depot at Llangennech also in the Llanelli District is programmed to close in 1988/89 with the loss of 600 jobs); 400 jobs at Allied Steel in Cardiff in 1985; 600 at Land Rover in Cardiff in 1986; 1,200 at BP Chemicals, Barry; 750 jobs at BP Llandarcy in 1985/86 and 300 jobs at Metal Box, Neath in 1985/86. At the following nine plants which have closed in the area, over 5,000 jobs were lost: Dunlop Semtex, Brynmawr; Talon Division of Textron, Pontypridd; Wiggins Teape (UK) Ltd, Pontypridd; Hymac Ltd, Pontlottyn; Crescent Toy Co Ltd, Newbridge; Chicopea Ltd, Ystrad Mynach; GKN Vandervell, Cardiff; Louis Marx, Swansea; and the British Aluminium Co Ltd, Resolven.

8E22. In contrast to plant closure, which were spread widely and fairly evenly across the Industrial South Wales, new manufacturing plant openings are concentrated in the Newport ttwa in the eastern part of the area, and to a lesser extent in the Blaenau Gwent/Abergavenny ttwa. It is only in the Newport ttwa that job gains at new plants opened since March 1981 more than offset job losses from plant closures. Details are given in Table 6.

Table 6. Manufacturing Plants Opened and Closed

TTWA	Manufacturing plants known to have opened since 31 May 1981, and still in production		Manufacturing plants known to have closed which were in production before May 31 1981	
	Nos	Latest Employment	Nos	Closure Peak Employment
Aberdare	3	50	3	200
Bridgend	15	300	25	2,600
Cardiff	21	700	63	4,500
Blaenau Gwent/ Abergavenny	23	1,050	26	2,400
Llanelli	7	250	14	800
Merthyr/Rhymney	13	600	29	2,700
Neath/Port Talbot	7	200	13	1,500
Newport	24	2,200	115	1,100
Pontypool/Cwmbran	10	200	14	700
Pontypridd/Rhondda	16	500	22	3,000
Swansea	13	600	26	2,900
TOTALS	152	6,700	250	22,400

Job totals may not add due to rounding.

8E23. Taken together, the County of West Glamorgan and the District of Llanelli, in the western part of the area, secured only 15 per cent of jobs arising from the opening of new manufacturing plants since 1981.

8E24. Though metal manufacture, including non-ferrous as well as steel and steel rolling and tubes, is still the single most important employment sector, the industry no longer dominates the industrial structure. Steel

making and steel rolling and tubes alone now employ fewer than the electrical and electronic engineering industries. The broad engineering sector, which also includes mechanical and instrument engineering, motor vehicle components and parts, other transport industries and office machinery and data processing now provides 40 per cent of all manufacturing job opportunities. In addition to the metal and engineering industries the other major employment sectors are Food, Drink and Tobacco, Metal firms, Paper, Paper producers, Printing and Publishing, Chemicals and Footwear and Clothing.

8E25. A continuing and very encouraging feature underlying the diversification of the manufacturing sector is the contribution to new job opportunities provided by entirely new enterprises. New manufacturing enterprises provide around 25 per cent of all new jobs provided at new manufacturing plants opened since 1976. Investment in the electronics industry is being positively encouraged in the form of the introduction of entirely new capacity, indigenous start-ups and the expansion of existing electronics plants. Recent successes have included Immos Ltd, Mitel Telecommunications Ltd, A & A Electronics, Shape Technology Ltd, and new plant openings by a major Welsh based electronics group - AB Electronics Ltd. These have, however, been offsetting job losses in this sector, often as a result of job losses at larger plants operating in the now more mature sectors of the electronics industry. As a result, overall employment in the electronics industry has not increased significantly since 1981.

Activity Rates

8E26. The economic activity rate for Industrial South Wales is lower than the Welsh average for males and higher for females. Both rates are, however, well below the GB rates for economic activity.

Unemployment

8E27. Despite a much smaller increase in the number and rate of unemployment over the years 1983-85 than during the period 1979-82, the level stayed at approximately 25 per cent above that for the UK and the rate for the profile area as a whole exceeded 16 per cent. There was a very slight improvement in some travel-to-work areas, although these were the exception rather than the rule. The male unemployment rate remained constantly at a higher level than the overall rate.

Table 7. Unemployment

	June 1983*			June 1985		
	TOTAL	TOTAL	MALE	TOTAL	TOTAL	MALE
	NO	%	%	NO	%	%
Travel to Work Areas						
Aberdare	3,497	19.0	23.4	3,936	21.2	27.6
Bridgend	8,440	15.7	18.5	8,777	16.3	19.2
Cardiff	26,009	13.2	17.5	28,592	14.4	19.1
Blaenau Gwent and Abergavenny	7,335	20.5	24.5	6,812	19.2	24.0
Llanelli	5,740	17.2	18.8	5,721	17.7	19.3
Merthyr & Rhymney	9,997	19.1	21.9	10,591	20.1	23.7
Neath & Port Talbot	8,164	15.9	17.3	7,800	15.4	17.0
Newport	12,036	14.9	18.2	12,679	15.7	18.9
Pontypool & Cwmbran	5,993	15.8	18.4	6,145	16.3	18.7
Pontypridd & Rhondda	10,326	16.1	19.3	11,105	17.3	21.5
Swansea	16,380	14.8	19.5	17,880	16.0	20.9

* Figures affected by statistical base change due to 1983 Budget measures

8E28. The long-term unemployed (those out of work for a year or more) also showed no signs of decreasing in number. By June 1985, more than 3,600, an extra 7 per cent, had been added to the 51,000 already in this category by June 1984.

Seasonal unemployment

8E29. As expected there would appear (see Table 8 below) to be little problem of seasonal unemployment, in the sense of higher rates in Winter, in Industrial South Wales.

Table 8. Seasonal Unemployment

	December 1983*			December 1985		
	TOTAL	TOTAL	MALE	TOTAL	TOTAL	MALE
	NO	%	%	NO	%	%
Travel to Work Areas						
Aberdare	3,759	20.4	25.0	3,754	20.2	26.5
Bridgend	8,705	16.2	18.9	9,005	16.7	19.8
Cardiff	27,425	13.9	18.3	29,160	14.7	19.4
Blaenau Gwent and Abergavenny	6,943	19.4	22.8	6,964	19.7	23.6
Llanelli	5,285	15.9	17.0	5,989	18.5	19.7
Merthyr & Rhymney	10,210	19.5	22.3	10,928	20.8	24.6
Neath & Port Talbot	8,085	15.8	17.0	8,001	15.8	17.2
Newport	11,878	14.7	17.8	12,765	15.8	19.1
Pontypool & Cwmbran	5,691	15.0	16.7	6,054	16.1	18.1
Pontypridd & Rhondda	10,635	16.6	20.0	11,130	17.4	21.7
Swansea	17,051	15.4	20.0	17,793	15.9	20.7

* Figures affected by statistical base change due to 1983 Budget measures

ii. Infrastructure

8E30. Ultimately, the full potential of direct measures to tackle Industrial South Wales' basic economic problems will not be realised without complementary efforts to upgrade the communications, water and sewerage, fuel, power and waste disposal services which directly support industrial activity. The main problems are outlined below.

Roads

8E31. The M4 is the most important strategic route serving the area, and an important objective in recent years and for the future is to improve links between the major centres of population and industry and the motorway to realise the potential it offers. A number of road schemes have been carried out and are in preparation to improve access to the M4 from parts of Cardiff and Newport. Merthyr is now linked by dual carriageway road to

the motorway and very substantial upgrading has taken place on the A467 which serves a number of valley communities and links the M4 with the A465 Heads of the Valleys Road.

8E32. The Severn Bridge is a vital link for traffic to and from South Wales and is thus of great importance to the area. A report by consultants has identified a need to strengthen parts of the Bridge to ensure that it could be safely used without any restriction to full capacity by the highest existing traffic loadings. A programme of strengthening and repair works was drawn up in 1984, and work on this is under way. A study into the available options for a second Severn Crossing is now being undertaken by consultants appointed by the Secretary of State for Transport and their final report is expected in the Autumn of 1986. The study was awarded ERDF aid amounting to £1,050,000 in 1984.

Railways

8E33. The area enjoys fast and frequent inter city service connections to London and other cities in England. Good services also operate to the North via Newport. Services along the Central Wales line will be improved following major investment by British Rail. The Cardiff suburban and valley railway network is the only suburban system of any size outside South East England and the Metropolitan Counties. The Valleys services into Cardiff operate at ½ hour intervals. As a result of recent promotional and marketing of improved services, the valleys network has seen a large increase in passengers. Further improvements are underway or planned including the renewal of passenger rolling stock from 1987; improved service frequencies and the opening of new passenger lines and stations.

Ports and Airports

8E34. The major ports are some 1,100 km from Rotterdam and access to the major EC Markets. The 5 major South Wales ports are very important to the economy of the area. Although there are general cargo handling facilities at all the ports (and facilities for container traffic at Cardiff, Newport and Swansea) these ports still have a degree of dependency upon the coal industry - during the 1984 coal dispute, exports reduced by around 70 per cent. This highlights the need for continued diversification and

Geest returned their major operation to Barry Docks in 1984. In 1986, Associated British Ports opened a major new freight and general cargo terminal at Barry Docks. European and transatlantic business is growing at Briton Ferry (near Neath).

8E35. Passenger traffic through Cardiff Wales Airport continues to grow. In 1984 it handled 486,000 passengers which represented a 19 per cent rise over the previous year. Work is in progress on extending the runway. This should be complete in the spring of 1986 and will enable direct transatlantic flights between Cardiff and the United States and Canada. This is part of the airport's programme of continued development.

Water and Sewerage

8E36. There has been investment in water services but further investment is required to provide treatment facilities, for water supply distribution pipework and the necessary drainage sewers in an area badly affected by mining subsidence. There is an ongoing need for the replacement and construction of new main sewers in order to facilitate industrial and residential development, and to enable long sea outfalls to be constructed for bathing beach water quality improvement. River characteristics are such that serious flooding is likely with heavy rainfall over a prolonged period. Severe and widespread flooding occurred in 1979 and severe but localised flooding occurred in the Swansea Valley in October 1985. A major programme of flood protection schemes for the urban areas shown to be vulnerable has begun. A report on a study of the technical and financial feasibility of a barrage across the Severn estuary is under consideration. The primary purpose of the barrage would be the generation of electricity but it would also offer opportunities for the development of industrial, tourism and leisure activities.

Other Services

8E37. The increased demand for gas throughout the area requires the transmission system to be reinforced. In general there is adequate capacity for present electricity demands, but this capacity is not necessarily in new development areas or in the area where new development is likely. For example, under-utilised assets resulting from colliery or steelworks closures can seldom be used to supply alternative industries. A programme to modernise the old electricity distribution system is now well

under way and is being supplemented by strengthening of overhead lines in order to meet more stringent technical standards.

8E38. Historically, the area has been an attractive area for the location of coal-fired power stations. Over the years, the numbers have declined and to replace them, inter-connections with the national electricity grid have been expanded. The stage has been reached where the older large generating stations are becoming uneconomic to maintain and substantial sums of money have been, and will be, required to provide additional system capacity.

8E39. The inadequacy of current industrial waste disposal facilities is of increasing concern. Major expenditure on new refuse disposal sites is needed. The geology, topography and densely concentrated population of South Wales means that new sites are difficult to find and always expensive to develop to basic standards of pollution control and amenity protection. Such facilities are, however, an essential support for industry.

iii. Social Problems

8E40. While Industrial South Wales does not have the extreme examples of inner city decline associated with the main conurbations, there are sizeable localities where intensive urbanisation based upon the primary industries during the last century and the early part of the 20th Century have produced similar problems of decay, neglect and decline. The valley communities in particular suffer from these problems which are also evident in the major settlements and towns of the coastal plain. Eight districts - Blaenau Gwent, Cardiff, Rhondda, Swansea, Newport, Merthyr Tydfil, Port Talbot and Cynon Valley - have been designated under the Inner Urban Areas Act 1978. Local authorities for designated districts have powers under the Act which enable them to assist in the social and economic development of their areas; this assistance is made available primarily for industry and commerce in the declared Improvement Areas and is eligible for support under the urban programme.

8E41. Priority must also be given to improvement of the social infrastructure if industrialists are to be encouraged to the area to expand employment opportunities and to diversify the economy. Housing conditions in the area remain the worst of all in Wales, particularly in Mid

Glamorgan. Over 40 per cent of houses in the area were built before 1919 and 10 per cent of the housing stock was judged "unfit" in the 1981 House Condition Survey. Conditions are particularly bad in Mid Glamorgan where over half the stock was built before 1919 and as well as 10 per cent unfitness, a particularly high proportion of dwellings (13 per cent) lack one or more of the basic amenities. Despite extensive land reclamation programmes, large areas of land remain unsightly, derelict and in need of reclamation. The per capita provision of residential care for the elderly in Mid and West Glamorgan and in Gwent are the lowest of the 8 social service authorities in Wales. Sizeable capital investment is required to enable the area to reach the standards of elsewhere in Wales and to keep pace with the growing numbers of the aged and unemployed. It is estimated that the population aged over 75 will increase by 9.6 per cent between 1984 and 1991. Outdated schools and other elements of the social infrastructure also require replacement or upgrading. These conditions together with the economic drawbacks described above not only have an adverse effect on inward investment but reduce the morale of the workforce, threaten cohesion in existing communities - in localities which have been famous for local community spirit - and may adversely affect latent entrepreneurial talent in the area.

C. PROSPECTS

8E42. It is estimated that the population of Industrial South Wales will decrease by 0.8 per cent between 1984 and 1991. Therefore diversification and expansion continue to need to be encouraged not only to provide jobs for those who have lost them but also in order to counter depopulation. There is a consequent heavy burden to be carried by infrastructure and communications which is exacerbated by a reduction in manning density in some of the more traditional main employers. A major task remains if infrastructure and transport routes are to be developed and renewed sufficiently. Considerable infrastructure investment will be required if the current economic decline is to be reversed.

8E43. While Industrial South Wales has substantial possibilities for growth and diversification it continues to be beset by grave economic problems. During the 1980s there has been a continuing and accelerating pace of structural change with a continuing shedding of labour in steel, coal and in the manufacturing sector (particularly in other traditional

main employers such as metal forming, mechanical engineering and clothing and footwear). Progress is being made in some sub-sectors of manufacturing, with jobs being created in, for example, electronics; and also in the service sector. Growth however tends to be sluggish and uneven (particularly in geographic terms) and at a pace which has not been able to match the jobs requirement generated by job losses and entry to the workforce. Further job losses are to be expected among the area's traditional employers - for example, in coal. Nevertheless, there is potential for self-sustaining long term growth through further stabilisation and development of the existing manufacturing base and through further unrealised potential in the service sector - although not always at the localities with greatest need. Modern industrial development, including the high technology sector, continues to display trends of growth and consolidation. Continually improving accessibility, particularly within the area which has generally good communications links with other areas; the availability of an adaptable labour supply, increasingly well trained; good labour relations and good cultural and educational facilities can all contribute to further growth and progress. The scale of the remaining problem - high unemployment, extremely so at certain localities, and the need to reverse current depopulation trends, particularly in the valley communities - is vast, however.

SECTION 2 - DEVELOPMENT OBJECTIVES

8E44. The economic assessment above demonstrates that Industrial South Wales is an area continuing to suffer from the effects of rationalisation in its traditional industries - with particularly severe effects at some localities - and where diversification, although occurring, is not widespread. The primary objective remains the reduction of present levels of unemployment and the provision of further jobs by encouraging the further diversification of the economic base coupled with consolidation and expansion. Specific long term objectives to achieve this differ in detail between the coalfield/valleys area, the valley mouths and the coastal plain but in general are:

A. ECONOMIC

- i. to continue to stimulate investment in the area;
- ii. to provide and develop a range and choice of fully serviced and accessible employment sites for industry and commerce at a variety of locations including urban centres, locations providing employment for commuters and existing communities;
- iii. to continue to attract mobile industrial projects, including high technology industries, from other parts of the UK and abroad;
- iv. to encourage the development, expansion and improved efficiency of indigenous industry, including manufacturing, service industries and commerce;
- v. to aid areas affected by industrial rationalisation, including the regeneration of old industrial sites and premises in urban areas and the regeneration of traditional industrial and commercial centres;
- vi. the development of environmental improvement schemes, including the reclamation of derelict land, to increase the area's attractiveness to inward investment including industry, tourism and the service and commercial sectors;
- vii. to foster the formation, development and growth of small firms and enterprise in all sectors;
- viii. to encourage greater innovative activity including more effective links between industry and higher educational institutions, and more effective business methods aimed at facilitating a greater capability to respond to changing market forces;
- ix. to improve and expand the skills of the workforce by training programmes;

x. to stimulate more service and commercial employment both in local and established main centres;

xi. to exploit the area's tourist potential and integrate tourism with other economic and recreational activities.

B. DIRECT INFRASTRUCTURE

i. to improve the road network to provide good access from all areas of existing or potential development to the motorway and to create a network to provide access to centres of population and commerce and industrial estates in the hearts of the valleys from the motorway in the south and the A465/A40(T) in the north;

ii. to safeguard and develop transportation facilities - including work on the development of new systems - assisting with the attraction of industry and the stimulation of tourism, and for the benefit of existing settlements and commuter traffic;

iii. to exploit the future long-term potential of the area's railways, airports and ports for a variety of uses;

iv. to maintain and upgrade all aspects of the direct infrastructure support for economic development as required in all sectors, including water, sewerage, flood protection, electricity, gas, telecommunications and waste disposal.

C. SOCIAL INFRASTRUCTURE

to improve all aspects of the social infrastructure, including improvements to the range and quality of housing in existing settlements, in order to maintain and contribute to the development of existing population centres and as a basis for improving the morale and physical well-being of the workforce, stimulating existing and potential entrepreneurs and encouraging inward investment.

SECTION 3 - DEVELOPMENT MEASURES

8E45. The measures outlined illustrate the continuing work being undertaken in a bid to meet the objectives for the economic development of Industrial South Wales. European aid has been of considerable benefit to the area's economic development by making available substantial assistance including ERDF aid of around £224 million. A list of the major projects which have received aid is at Appendix 1. The greater part of the area (with the exception of parts of Mid Glamorgan) has also benefitted from the packages of assistance made available, as part of the special measures for steel rundown areas, under EC Regulations 2616/80 and 216/84.

A ECONOMIC

Financial Assistance

8E46. Financial assistance to industry continues to be important in encouraging the growth of indigenous industry and to attract mobile industrial projects. Direct financial assistance is made available by Central Government, through the availability of Regional Development Grants and Regional Selective Assistance. In 1983/84 and 1984/85 payments of old style Regional Development Grants of £25,000 and over in Industrial South Wales had a total value of over £60 million and offers of new style Regional Development Grant (introduced in 1984) made in 1984/85 totalled £205,000. Offers of Regional Selective Assistance accepted in 1983/84 and 1984/85 totalled over £66 million.

8E47. In addition, agencies in the area such as the Welsh Development Agency, DBRW (operational in those parts of the area within the County of Powys), Wales Tourist Board and local authorities stimulate industry by the provision of equity capital, loans, grants and promotional work. These functions assist and catalyse private finance and investment which is a crucial requirement. The urban programme and Urban Development Grant scheme also provide financial assistance (both for economic and social schemes) by means of a 75 per cent grant from Central Government to local authorities. Allocations under the Urban Programme for 1986/87 amount to over £13 million for schemes which are directed at economic and social regeneration, especially those encouraging the creation of small business ventures and jobs. Since the introduction of the Urban Development Grant

(UDG) scheme in 1982, grants totalling over £15 million have been allocated to local authorities in the area to help them bring forward economic and social projects. The most significant UDG project to date relates to the redevelopment of the Bute East Dock in South Cardiff, which, with UDG support, will involve a total investment of over £42 million. Further substantial redevelopment of the South Cardiff waterfront area is now under active consideration.

Stimulation of indigenous and attraction of mobile industry

Industrial Sites/Factory building

8E48. The main thrust of the factory building and site development programme has been directed at the steel closure areas of Ebbw Vale, Cardiff, Shotton, Llanwern, Port Talbot and Llanelli. Altogether the WDA provided over 500 units with a total area of almost 4 million sq ft in these steel rundown areas between 1979 and 1985. The steel closure areas also benefited from additional assistance packages to assist infrastructure development including industrial land acquisition and land reclamation works.

8E49. In addition to the WDA special programmes for the steel areas (supplemented by provision of sites and units by the local authorities) the WDA, Cwmbran Development Corporation and the local authorities have also provided new factories elsewhere in Industrial South Wales: the WDA has completed 383 units (2.2 million sq ft) and a further 43 units (390,000 sq ft) are under construction or planned. In addition the DBRW has completed 29 units of a total area of over 400,000 sq ft in the profile area and has another unit of 20,000 sq ft planned. The local authorities have provided a number of serviced sites and industrial estates at a variety of localities throughout the area - for example, Brynaman (Dyfed), Wentloog, and North Pentwyn (South Glamorgan), Bridgend Science Park and estates at Aberdare, Cilfynydd and Bedwas (Mid Glamorgan) and Briton Ferry (West Glamorgan). The Enterprise Zone at Swansea is also important and a site on the Cardiff foreshore has been established as a Freeport zone.

8E50. Completion of the special programmes for the steel rundown areas represented the culmination of an immediate and specific response to their problems with a considerable impact upon job creation. The special

programmes, and parallel normal construction programmes, have largely satisfied the market for speculatively built industrial premises - particularly larger factories - in the area, although the position, and remaining needs, vary considerably according to locality. Accordingly, within the context of the WDA's evolving overall response to economic change, the Agency's strategy on property development now involves a reduction in speculative factory building and a concentration on filling "market gaps": building purpose-built premises for high technology industries, for inward investors and for existing companies seeking to expand. Generally there has not been such a radical shift in local authority strategy for factory provision as the local authorities have for some time by and large (although with variation at individual localities) concentrated more upon the small business end of the market - effectively, therefore, filling a "market gap". This strategy - largely involving the provision of small workshops and starter premises, whether new or in renovated older premises - will continue, with the majority of County and District Councils in the area having plans for the programme period for further small premises - often in workshop complexes - and additional supporting infrastructure. Additionally some authorities are involving themselves increasingly in more innovative departures including high technology sites (see para 8E58 below); joint ventures with the private sector and with other public agencies; further development of the area's Enterprise Zone and Freeport; the provision of small units with common services; the provision of storage facilities for companies and the integrated development of small units with other developments.

INDIS

8E51. The Industrial Information System (INDIS), designed to facilitate the growth of employment opportunities through the provision of computerised information about local suppliers, markets and capacity, is continuing to develop. It is operated by Mid Glamorgan County Council in conjunction with West and South Glamorgan County Councils and has been extended to cover the County of Dyfed in addition to the other Industrial South Wales counties.

Aid to alleviate urban decline and effects of rationalisation

Enterprise Zone

8E52. The Enterprise Zone in the Lower Swansea Valley was established in June 1981 as an experiment designed to generate self sustaining economic activity in an area of both physical and economic decay. The measures utilised are a range of financial incentives coupled with a more relaxed planning regime and speedier handling of the remaining controls. The Enterprise Zone has seen the establishment of a number of schemes including the Phoenix and Rainbow Business Parks, and overall 315 acres of land have now been developed, 139 firms are now operating in the Zone, and some 1,650 people are employed there. Developments in the Enterprise Zone have included the service industries as well as manufacturing.

Enterprise Trusts

8E53. Enterprise Trusts have continued to develop in Industrial South Wales, with the sponsorship of local and central government, the development agencies, the private sector and in some cases the ERDF. They serve as a stimulus for private sector initiatives to meet local needs and resources generally with the aim of creating jobs and maintaining or improving the balance of the local economy by helping the development and expansion of small firms. They provide services such as managerial and marketing advice, technical expertise, access to financial institutions and management training. In steel and coal closure areas BSC (Industry) and NCB (Enterprise) - who are also involved in providing industrial premises - often act as sponsors for enterprise agencies who in turn act as brokers for their services. Agencies operational in the area include the Neath Development Partnership which has cooperated with Neath Borough Council in the provision of managed village workshop schemes; the West Glamorgan Enterprise Trust which has launched an Investment Partnership scheme to link investors with local projects needing funds, and which is represented on the Board of Management of the Swansea Centre for Information Technology; the Llanelli Enterprise Company which has completed managed workshop complexes at Trostre Road, Llanelli, and at Burry Port; the Merthyr and Aberdare Agency for the Development of Enterprise, which has completed a workshop complex with common services at Merthyr Tydfil is extending its operations to the Cynon Valley; Cardiff and Vale Enterprise which plans projects for a marketing centre, business expansion scheme and

participation in the Business Technology Centre, and the Newport Enterprise Agency which has provided managed nursery units. A new agency - the Amman Valley Partnership - has recently been established with support from NCB (Enterprise) and the WDA. These agencies estimate that they have assisted in the creation of over 3,600 new jobs in Industrial South Wales in the last few years.

Aid to areas affected by coal and steel rationalisation

8E54. Help to these areas, from BSC (Industry) and NCB (Enterprise) is supplemented by the ECSC's direct and agency loans which ensure that assistance is available to both large and small firms. Loan aid has been made available to companies employing ex-coal and steel workers as well as investment in the steel industry itself. The ECSC has also contributed to various schemes to aid redundant steel workers. The EIB has also provided a loan source for many firms in the area.

8E55. The counties of Gwent, South and West Glamorgan and the former Llanelli and Port Talbot TTWAS each comprise a designated zone under the ERDF non-quota steel measure which is designed to encourage the growth of new and existing enterprises and diversify the economy in steel rundown areas. This has provided £13.5 million to be spent during the period 1980-89 on measures to revitalise these areas once so heavily dependent on steel making and has included valuable assistance to local and public authorities to convert redundant buildings into suitable workshop space for small businesses. It has also financed the Business Improvement Services Scheme which, since November 1984 has provided assistance to small firms to help with the costs of buying in consultancy advice in specialist areas, such as finance and marketing; of obtaining common services and of purchasing assets. As at February 1986 over 800 applications have been received and over 500 offers made with a grant value of £2.3 million.

Land reclamation

8E56. Large areas of land in Industrial South Wales bear the scars of centuries of mining, quarrying, smelting, dockland industries and other industrial activities. The Welsh Development Agency coordinates and finances a programme of land reclamation which is carried out by local authorities and also coordinates and finances a programme of environmental

improvement which is carried out by local authorities and voluntary bodies. In 1970 an estimated 7,000 hectares of land was derelict in Industrial South Wales and the Agency, between 1976 and 1985, financed 208 schemes reclaiming 2,100 hectares in the area at a cost of £69 million, bringing forward land for forestry, housing, amenity and industrial use. Notable schemes which have been undertaken so far include the rehabilitation of the vast Rising Sun tip complex at Blaina in Gwent at a cost of £7.5 million, and factories built on the site by the Agency are now occupied and providing employment. Another major scheme was undertaken to remove the last remaining blot on the landscape of the Lower Swansea Valley, which was formerly one of the worst industrial eyesores in the UK. This scheme cost £1.4 million and created new industrial land in a lakeside setting in the Swansea Enterprise Zone.

8E57. 62 per cent (£23.7million) of the Agency's latest programme has been allocated to projects in Industrial South Wales. Major schemes include the reclamation of the former Cambrian Colliery tips at Clydach Vale at an estimated cost of over £2.5 million, and the reclamation of the burning Craig-y-Duffryn tip at Mountain Ash at an estimated cost of £1.8 million. The Agency's schemes will not only improve the environment but also make available land for industrial and other after-use. The major development of South Cardiff dockland being undertaken with Urban Development Grant assistance involves substantial reclamation work. Because of the scale of dereliction which remains, throughout the area, further investment will be required over the programme period and beyond it.

8E58. Provision of premises by the WDA, DBRW, Cwmbran Development Corporation, local authorities and other agencies such as Enterprise Trusts have a vital role to play in facilitating and encouraging the development of new small businesses in addition to helping with the encouragement of inward investment and the stimulation of indigenous industry. In many cases local authority construction of premises such as workshop complexes has also been paralleled by the refurbishment of redundant premises to provide small workshop units for new businesses and this work will continue where suitable premises can be identified. The Enterprise Zone at Swansea, and Enterprise Trusts are also important. Government schemes benefitting the area include the Business Improvement Services Scheme, part-financed by the ERDF, which assists small firms in the steel closure areas to obtain

grants to assist with the costs of obtaining specialist advice; the loan guarantee scheme which assists borrowing from commercial sources of finance and the Enterprise Allowance Scheme which provides an allowance to unemployed persons setting up in business. Advice and information is provided by the Small Firms Service, which is administered by the WDA in association with the Department of Employment and the WDA's Small Business Unit and by the local authorities who also undertake promotional work assisting small businesses. A number of authorities also operate formal business and business advisory centres.

Innovation

8E59. Both Cardiff and Swansea universities are actively developing their potential for strong and productive links with industry. University College, Cardiff is establishing, in conjunction with South Glamorgan County Council, a Technology Centre to provide incubator workshops accommodation and intensive support with research facilities to new firms developing new technology activities from both an academic and general business community background. Also in Cardiff, the University of Wales Institute of Science and Technology (UWIST) and the Welsh National School of Medicine, linked to a large teaching hospital, have an important role in encouraging and developing research. At UWIST, an Automation and Robotics Centre has been established to provide a specialised service to industry in these fields. The prospects for the establishment of a Business Innovation Centre at Cardiff, to draw together many of the activities which support and assist small firms' development, are currently under investigation. At Swansea a new Innovation Centre, being developed jointly by the University College and the WDA, is situated on the university's campus, and is able to draw upon this environment for specific research and development orientated ventures and also the opportunity for collaborative projects in "leading edge" technology. Swansea University College has established an international reputation in the fields of numerical methods in engineering, leading to computer-aided design and micro-electronics and micro-processing in electrical and electronic engineering, as well as being prominent in biotechnology activity. The Polytechnic of Wales is located near the Treforest Industrial Estate, where Mid Glamorgan's Industrial Resource Centre (housing INDIS and an Information Technology Centre) is housed; the Polytechnic continues the development of its close links with industry. In addition to local authority support at a variety of locations for ITECS and

for the development of a number of high technology sites and premises (in which context the development of major local authority-aimed site at Gilwern will be important) a number of other innovative developments are being explored. One example, the possible development of a chemical park at Barry ("The Chemplex") is currently being investigated by the Vale of Glamorgan Borough Council in conjunction with South Glamorgan County Council. The project would involve the promotion of the park complex concept based on the presence of existing chemical sites.

Training

8E60. Training of the workforce by industry is supplemented by central and local government. The training and vocational education programmes provided by the Manpower Services Commission are now more flexible and more responsive to the changing needs of industry. There has been a move away from long duration, Skillcentre based training for unemployed people. The MSC is acting more as a catalyst providing direct pump priming support to industry, including small businesses, both on employer premises and at local institutes of further and higher education. Local authorities complement such training by acting as YTS managing agents and as sponsors of Community Programme schemes. Local Authority funding has helped to establish 8 Information Technology Centres in the area, the first opened at Neath in September 1982. Parts of the area falling within Dyfed and Powys have benefitted from the Small Firms Wages Subsidy Scheme which is supported by the European Social Fund. Blaenau Gwent Borough Council operate an Opportunities Centre which has been funded from the ERDF, the Urban Programme and the MSC. In South Glamorgan a Women's Workshop has been established to provide training in new technology skills. A further women's workshop is currently being established at Onllwyn, near Neath. Gwent, Mid Glamorgan and West Glamorgan Local Education Authorities commenced in September 1984 schemes under the MSC's Technical Vocational Education Initiative, with the aim of improving the suitability of training for 14 to 18 year olds. South Glamorgan commenced a similar scheme in September 1985.

Service sector

8E61. The development of the towns to provide attractive locations for office and retail development is a continuing process exploited when the

economic benefits can be maximised. For example, major new shopping centres have been completed at Swansea and Cardiff and town centre improvements have been undertaken or are planned at a number of other towns including a major project at Neath. In Cardiff's City Centre, St David's Hall, a 2,000 seat Congress centre has been constructed with EEC aid.

Tourism

8E62. Development of the growth opportunities afforded by tourism which has as yet unrealised employment potential in the area continue as a major priority for Industrial South Wales with programmes and priorities varying according to the differing localised potentials throughout the area. The ERDF has assisted projects in the area by £9.8 million in total. Private sector initiative is important and is complemented by the work of the statutory and local authorities. Projects planned by the local authorities for the programme period include the improvement of accommodation, facilities and attractions in the more traditional tourist areas (the coast and coastal resorts and the mountains) for example a number of projects are planned at Porthcawl, a traditional seaside resort in Mid Glamorgan including the improvement of swimming and other recreation facilities relating to sea-front tourist activity and a planned (by the private sector) marina; improvements to beach amenity and safety facilities, information centres and improved accommodation are also planned; at Swansea, another traditional seaside holiday area, a number of projects are planned designed to build on the impetus to visitor attraction arising from the marina and leisure complex developments and involving the development of the range of accommodation and entertainment venues available to the tourist. A marina development is planned at Penarth. Other examples include a number of projects which are planned with the aim of broadening the profile area's market appeal to tourists, and stabilising and increasing visitor flows. This will involve, for example, projects designed to build on the already emergent popularity of industrial heritage attractions: included are projects at Cardiff to complement the development programmes of the Welsh Industrial and Maritime Museum and Butetown Historic Railway Society; and the development of heritage and spa facilities in the Rhondda/Taff Ely and Merthyr areas and a major heritage development and promotional project at Blaenavon, linked with the further development of the established Big Pit Mining Museum. Another series of planned developments includes the opening up of old industrial canals in

the area for water-based activities - for example at Neath and Swansea. Additionally the improvement of information and interpretative facilities and of direct infrastructure projects in support of tourism are planned. Furthermore as well as the upgrading and provision of new accommodation facilities at a number of the more established major settlements, a range of projects involving the improvement of accommodation and attractions at smaller locations throughout the area are planned as are projects improving facilities at attractions based around natural service beauty (for example country park projects at Pembrey, Aberdare; the Darren Valley; a wildfowl centre at Machynys, a scenic drive at Cwmcarn and farm-based attractions at Tir Tremant and Ynys Hywel).

B. DIRECT INFRASTRUCTURE

Road Communications

8E63. Major work has continued on improving road areas to and within Industrial South Wales. The EC has made a major contribution to this work, assisting projects improving and extending the highway network. The ERDF has allocated some £81 million to major schemes and South Glamorgan County Council, in addition to having obtained a previous £20 million loan from the EIB is seeking further EIB loan finance for two further stages of the Peripheral Distributor Road - the Butetown and Central Links West Glamorgan County Council has also negotiated an EIB loan of £8.5 million to assist with the financing of schemes along the A4067 Swansea Valley Route, the A483 Carmarthen Road Corridor, a contribution to the cost of the A484 Loughor Bridge replacement and other schemes. Gwent County Council has also received a £12 million EIB loan to assist with the cost of the A467 and Llanelli Borough Council has also part financed programmes with the assistance of EIB loans.

8E64. In the strategic context, major headway has been achieved with the construction of the M4 motorway - there are now 74 miles of motorway between the Severn Bridge and the western terminus of the M4 at Pont Abraham. One section remains for completion - the 6 mile stretch between Baglan and Lon Las on which preparatory and design works have been undertaken. Further work is underway to improve access via strategic and major local routes, benefiting access to the motorway, industrial complexes and docks and to provide for the reconstruction of bridges. The need to

revitalise the economies of the densely settled valleys in the area has made the need to develop and improve their road system a main priority but topographical and geographical features impose difficulties. A separate note on road measures is at Appendix 2.

Bus and rail

8E65. The scale of commuting from the valleys to the coastal towns and within the conurbations has required investment in rail and bus station facilities. Cardiff Central Bus Station, with ERDF assistance, has been redeveloped and similar developments are planned at other nodal community points including, in the programme period, improvements to the bus terminus at Maesteg and improvements to bus/rail interchanges at Bargoed and Caerphilly.

8E66. Recent investment in the railways in Industrial South Wales has included the re-building of main inter-city stations at a number of locations including Neath, Bridgend, Cardiff and Swansea. Several new stations have been built and more are under consideration in the Cardiff-Valley rail network. South and Mid Glamorgan Councils and British Rail are developing a strategy for the Cardiff-Valleys network to strengthen and develop the rail service. The strategy would include network improvements, new rolling stock, stations and various other initiatives. British Rail's investment programme for the programme period will involve expenditure of over £5 million on Valleys line improvements, a further major project costing almost £3 million to modernise level crossings, track and signalling at various locations on the South Wales Main line and surrounding branch lines, providing new facilities for freight and passenger users and general enhancement of facilities. In addition a new station is planned at Cwmbran (at a cost of around £1/4 million) which will assist with the attraction of further investment to the New Town. Further expenditure of around £5 million is planned for the modernisation of the Freight Depot at Margam and the servicing depots at Swansea and Cardiff (Canton and Cathays).

8E67. South Glamorgan County Council are also considering the introduction of a light rapid transit system in Cardiff. If introduced, the system would initially link the South Cardiff docklands redevelopment with the Central Cardiff area and may, subsequently, be used in other areas of the City.

Ports and airports

8E68. Improvements to port facilities in Industrial South Wales, important factors in the attraction of new industry and to the efficient operation of existing businesses, have continued and are ongoing. Further improvements to facilities are planned for the programme period at each of the active ports in Industrial South Wales. Additionally other projects are planned at a number of areas to bring disused dockland into productive use.

8E69. Improvements to the runway at Cardiff Wales airport will bring future benefits through the operation of direct Trans-Atlantic flights. In addition a heliport has been developed in Cardiff and proposals for a STOLPORT short take-off and landing strip, with support facilities, possibly at a docklands location within Cardiff are under consideration. At Cardiff-Wales airport NDN Aircraft Ltd are to establish a plant manufacturing light aircraft with the creation of over 100 jobs.

Water, Sewerage and Drainage

8E70. Major investment in water services, which are of vital importance to the successful development of Industrial South Wales, has continued. Projects are important not only to provide new supplies and sewerage systems and renew, replace or upgrade old system to meet the needs of industry and if existing and growing communities, but also to cope with demand stemming from tourism - whether to provide an improved system or to upgrade the environment, particularly along the coast. Major projects have been undertaken to service the growing industrial estates in the heads of the valleys; in the re-sewering of the main valleys, in flood protection and sea defence. The ERDF has provided assistance of £11 million, since 1975 including in recent years the major projects listed in Appendix 1.

8E71. During the programme period a major investment programme with an estimated cost of around £86 million is planned. The programme will involve water supply service improvements at numerous locations in order to meet the demands of industry and tourism (major projects will include ongoing works on reservoir improvements at Taf Fawr, water supply works at Cefn Mably, the completion of the Wye Abstraction pumping station and Phase 2 of the Court Farm link main and works); and projects to improve water

treatment to EEC standard - for example at Georgetown and Wentworth Waterworks. Sewerage works are planned at a number of locations in order to meet the needs of industry and tourism - for example the Rhymney Valley. Sewerage disposal works are planned to meet the needs of industry and of tourism and include important measures to improve beaches - works which are vital to complement direct tourism developments - at a number of locations including Penarth, Barry and Lavernock, Porthcawl and the Neath Valley. Further flood protection works are also planned - for example at Ogmore and an Afan flood protection scheme.

Support Services

8E72. Considerable expenditure on the gas transmission system has been undertaken in Industrial South Wales, with the benefit of £11 million ERDF assistance. The current Wales Gas Operating programme is dominated by the extension of the Dowlais/Nelson pipeline to Nantgarw and securing supplies to the South Wales transmission system. Work on the construction of a 48 inch pipeline between Dowlais and Nelson is complete and within the programme period it is planned to extend this pipeline from Nelson to Nantgarw, completing a third source of supply into the South Wales system. Another project will involve the construction of a pipeline between Cefn On and Nantgarw which, with the replacement pipeline between Baglan and Port Talbot, will facilitate the abandonment of large sections of obsolete main between Newbridge and Nantgarw. Major reinforcement is also planned for Newport, Swansea, Hay on Wye, Ystradgynlais, Pontycymer, Maesteg/Cymer, Barry, Cwmbran and the Rhondda (Porth). This investment programme will involve estimated expenditure of almost £15 million. Pressure reduction station work is also planned for the programme period at various localities - for example, Rhiwderin/Crindau and Gilwern Village.

8E73. A substantial programme of improvements to the electrical mains supply system, to meet industrial and domestic demand, is also planned for Industrial South Wales for the programme period. This will include reconductorising of the 132kv overhead line in a number of circuits; ongoing work on the provision of a new Upper Boat/Llanfabon 132kv double circuit line; ongoing work on telecontrol systems and microwave telecommunications systems; and line reinforcements, reorganisation and replacement.

C. SOCIAL INFRASTRUCTURE

8E74. It is vital that work to directly assist the development of the Industrial South Wales area should be complemented by a wide ranging programme of improvement to the social infrastructure. Much has been achieved, with the improvement of the physical fabric and of the environment, through programmes including the WDA's land reclamation and environmental improvement schemes; improvement of poor housing stock and provision of new build dwellings; improvement of educational buildings and facilities; improvements to hospital and health facilities; social services provision and sport and recreation provision: Urban Programme assistance of £4.7 million assisted social schemes in the area in 1985/86 and a further £5.5 million has been allocated to such schemes in 1986/87. Significant private sector input into the renewal of run down urban areas has been generated as a result of the Urban Development Grant scheme, launched in April 1982. Due to the area's history of rapid growth years ago and more recent substantial decline, further massive investment will be required in ongoing programmes in order to improve the overall environment, assisting with the attraction of investment and the physical well-being and morale of the workforce.

8E75. Appendix 4 tabulates some of the main projects being undertaken in Industrial South Wales during the Programme Period in order to further the objectives outlined in section 2 above. The list reflects current priorities and projections but is not exhaustive.

SECTION 4 - IMPLEMENTATION AND COORDINATION OF INVESTMENT

Financial Resources

8E76. The following estimates of capital expenditure in the Profile Area over the programme period are based upon project costs as identified by the local authorities and public bodies which contributed to the compilation of the programme. Practical considerations preclude the preparation of accurate estimates for every project listed in the Appendix and the totals are therefore indicative only.

	1986-87	1987-88	1988-89	1989-90
	m	m	m	m
Factory building, site development and land reclamation	19.3	17.9	18.0	17.0
Tourism	19.1	20.8	19.5	19.4
Roads	51.1	42.5	41.8	19.2
Rail	4.0	5.3	0.5	1.9
Water, sewerage and flood protection	23.6	23.4	21.2	18.3
Electricity	24.1	21.9	22.6	21.3
Gas	3.4	3.4	3.4	3.4

Notes: Factory building, site development and land reclamation - excludes expenditure by Welsh Development Agency

Tourism - excludes Wales Tourist Board Grant

Roads - estimated expenditure on trunk roads, and on county roads over 5 million. Estimates provided by Welsh Office.

Coordination of Investment

8E77. Each County Council in the profile area has a Structure Plan, which has been approved by the Secretary of State and which, together, contain policies and proposals for the area's development until 1991. In addition, Local Plans, prepared by the District Councils (except in National Parks where they are prepared by the County Councils) are required to be in general conformity with the Structure Plan for the area they are in. These plans provide a system for the co-ordination of investment. The local authorities and the agencies responsible for development measures all regularly consult on development objectives and projects.

8E78. The Swansea Enterprise Zone is managed primarily by Swansea City Council but the Land Authority for Wales, WDA and the private sector contribute to its development. Bodies such as the Land Authority and the Cwmbran Development Corporation have worked in close co-operation with the local authorities, who in turn are heavily involved in coordinating the efforts of local enterprise trusts and hence interacting with industry. The local authorities are also heavily involved in the South Wales Valleys Coordinating Committee which, with the involvement of the statutory agencies and other interested bodies, coordinates the promotion of tourism.

8E79. Industrial South Wales has been chosen as the pilot study area in Wales for the EEC proposals for integrated operations and a pilot study document has been forwarded to the Commission.

8E80. Mid Glamorgan County Council, in conjunction with the Mid Glamorgan District Councils and Pontypridd Town Council, South Glamorgan County Council, British Rail, British Gas (Wales) and the Welsh Water Authority and the Welsh Office, has prepared an application for assistance from the ERDF under the EC Fund Regulation 1787/84 as a national programme of community interest, relating to the development of the County of Mid Glamorgan and its regional communications infrastructure links. The total investment value of this programme application is 96,723,000 and the level of grant being sought is 45 million. Many of the planned projects for Mid Glamorgan for the programme period are included in the programme application and are not, therefore, included in Appendix 4.

8E81. Further substantial investment programmes are required in Industrial South Wales in order to continue to erode the mass of accumulated problems and to fulfill objectives for development, regenerating the economy and introducing diversity and the capacity to adapt to continuing structural change. New technology industries, expansion in the non-manufacturing sectors and further development of essential infrastructure are all important as is concomitant investment in the support services.

ERDF AID TO INDUSTRIAL SOUTH WALES

Indicative projects which have received aid in recent years
(Para 8E44 refers)

Authority	Project	Eligible Cost £	Grant Commitment £
Industrial Development			
Gwent CC	Rassau Ind Est Access Road	612,150	183,645
Associated British Ports	Improvement of Cranage Facits	522,644	261,322
Cwmbran Development Corporation	Cwmbran Drive Ph 1 St 2	2,616,000	1,308,000
British Telecom	Pontypool telecom development	965,340	289,602
Merthyr Tydfil BC	Morlais Brook culverting ph 2	1,450,000	435,000
Land Authority Wales	Brackla Ind Estate, Bridgend	710,700	213,210
Mid Glam CC	Bridgend Science Park phase 1	1,337,000	401,100
Mid Glam CC	Access road to Brynmenyn Ind Est	754,500	377,250
Vale of Glam BC	Penarth Dock - access road - phase 2	985,000	295,500
Vale of Glam BC	Penarth Dock Road Improvements	447,000	223,500
Swansea CC	LSV Enterprise Zone, works for 1982	2,558,646	767,594
Swansea CC	LSV EP Phoenix/Valley Link Roads	620,000	186,000
Swansea CC	Road/Rail Distribution Centre	625,000	187,500
Llanelli BC	Cross Hands Business Pk - Infrastructure	462,080	231,040
British Railways Board	Kidwelly Junction - Coedbach NCB	1,252,460	250,492
Welsh Water Authority	Llanelli Sea Defence Wall	1,340,000	402,000
South Glam CC	East Moors Link Ph 2 1T	4,714,850	1,414,455
Road Communications			
Gwent CC	A467 Crumlin - Aberbeeg improvement	4,500,000	1,350,000
Gwent CC	A467 Crumlin - Aberbeeg 3rd T	12,111,000	3,633,300
Gwent CC	A472 Maesycwimmer - Newbridge improvement	735,400	220,620

Authority	Project	Eligible Cost £	Grant Commitment £
Road Communications (Cont'd)			
Gwent CC	A467 Risca - Rogerstone By-pass	15,260,000	4,578,000
Gwent CC	Queensway and Pye Corner Improvements	1,744,130	523,239
Gwent CC	A467 Risca - Rogerstone By-pass	1,192,712	357,813
Gwent CC	A4042 Kingsway/Docksway Ph 1 & 2	647,750	194,325
Gwent CC	A467 Risca/Rogerstone By-pass	15,192,500	4,557,750
Gwent CC	Pontymoile to Lower Race, improvements	1,897,723	569,317
Gwent CC	A4043 William Street By-pass	661,500	198,450
Gwent CC	A467 Aberbeeg - Abertillery improvement	5,293,000	1,587,900
Mid Glam CC	Aberdare by-pass A4059 Sl (Ph 2)	2,092,500	627,750
Mid Glam CC	Abercynon northern by-pass	3,150,000	945,000
Mid Glam CC	Aberdare by-pass stage 2	4,346,500	1,303,950
Mid Glam CC	Aberdare by-pass stage 3	1,191,600	595,800
Welsh Office	A470 Abercynon-Pentrebach	41,281,000	12,384,300
Mid Glam CC	Trehafoed by-pass	2,924,000	877,200
Mid Glam CC	A4119 Tonyrefail by-pass	9,545,000	2,863,500
South Glam CC	Ely Link (3rd Tranche)	5,427,729	1,497,748
South Glam CC	East Moors Link Ph 2	8,560,000	2,568,000
South Glam CC	PDR Grangetown Link Phase 1	1,400,000	420,000
South Glam CC	PDR Grangetown Link Phase 2	37,871,000	11,361,300
South Glam CC	Penarth Road Improvements	719,000	215,700
Welsh Office	A232 Culverhouse X to Capel Llan	10,830,000	3,249,000
West Glam CC	A483 Carmarthen Road, Dyfatty	1,117,790	335,337
West Glam CC	A4067 Oystermouth Road improvement	890,330	267,099
West Glam CC	B4295 Swansea Road, Waunarlwydd	620,347	186,104
West Glam CC	A483 North Dock Improvement 2nd Tawe Bridge	4,880,000	2,440,000
West Glam CC	A4067 Ynysforgan to Glais	5,908,298	2,954,149

Authority	Project	Eligible Cost £	Grant Commitment £
Road Communications (Cont'd)			
West Glam CC	A483 Carm Rd Bryn Rd - Ffach X	731,160	365,580
West Glam CC	A4216 Sketty Lane Improvement	1,146,000	573,000
Welsh Office	A48 Cross Hands - Llandarog By-pass	17,724,000	8,862,000
Dyfed CC	A4138 Llanelli - Hendy Link road	3,540,213	1,062,064
Dyfed CC	A4138 Llanelli - Hendy Link, 1st Tranche	4,291,485	1,287,445
Welsh Office/Dept of Transport	Second Severn Crossing	2,100,000	1,050,000
Dyfed CC	A484 Star Hotel, Trostre	9,191,902	4,595,951
Tourism			
Cardiff CC	Cardiff Bus Station, reconstruction	1,235,595	370,678
British Railways Board	Cardiff rail station improvements	1,560,227	468,068
Cardiff CC	Sloper Road Bus Depot Development	1,710,000	513,000
South Glam CC	Dyffryn House, Cardiff	1,003,800	301,140
Swansea CC	Swansea Theatre/Arts Development	9,179,907	2,753,972
Swansea CC	Knab Rock Development	1,050,000	315,000
Swansea CC	Refuse Bailing Plant, Swansea	2,816,000	1,408,000
Public Utilities			
S Wales Electricity Board	Microwave Links	897,760	269,328
Wales Gas	SE Gas Reinforcement 2nd Tranche	14,996,000	4,498,800
Wales Gas	SE Gas Storage and Reinforcement	1,015,000	304,500
Welsh Water Authority	Wye Abstraction Scheme, stage 2	4,846,542	1,192,604
Welsh Water Authority	Wye Abstraction Scheme, stage 2	2,870,000	861,000
S Wales Electricity Board	Uskmouth 132kv system reorganisation	3,185,000	955,500
Welsh Water Authority	Court Farm Treatment Works Stage 1	1,800,000	540,000
Welsh Water Authority	Newport/Crosskeys flood alleviation	1,326,000	397,800

Authority	Project	Eligible Cost £	Grant Commitment £
Public Utilities (Cont'd)			
S Wales Electricity Board	Cwmbran 132/11kv reinforcement	1,041,000	312,300
Wales Gas	Reinforcement supplies to Pontypool	694,590	347,295
S Wales Electricity Board	Aberdare area reorganisation	726,000	217,800
Wales Gas	Aberdare, Hirwaun reinforcement	2,067,042	620,113
British Gas	Dynevor Arms LNG Storage Facilities	13,470,000	4,041,000
Wales Gas	Porthcawl gas reinforcement	1,190,681	357,204
Wales Gas	Reinforcement gas supply to Bridgend	1,102,000	330,600
Welsh Water Authority	Bridgend Flood Prevention Scheme	3,605,000	1,081,500
S Wales Electricity Board	Caerphilly reorganisation	580,000	174,000
S Wales Electricity Board	Cardiff sub-station reorganisation	930,000	465,000
British Telecom	Cardiff System X Development	6,947,700	2,084,310
British Telecom	Barry, telecom development	1,374,000	412,200
CEGB	Supergrid Transformer, Margam	617,900	185,370
Welsh Water Authority	Baglan Brook improvement scheme Ph 1 & 2	1,823,644	547,093
S Wales Electricity Board	Swansea Nth - Carmarthen Bay system reorganisation	637,000	191,100
British Telecom	Swansea Bay System X development	7,482,600	2,244,780
British Telecom	Llanelli Telecoms Scheme	5,779,000	1,733,700

ROAD DEVELOPMENT MEASURES

(Paragraph 8E63 and map at Appendix 3 refer)

Coastal plain

i. The M4 motorway across South Wales is now virtually complete. The necessary preparatory work for the one remaining section - the 6 mile stretch between Baglan and Lon Las - is largely complete and it is hoped to be able to put the project under way in the period 1988-1990. When completed there will be 80 continuous miles of motorway stretching from the Severn Bridge into Wales. Improvements are also being made to trunk roads in the area. The A4232 Culverhouse Cross - Capel Llanilltern Improvement was completed in March 1985 and has improved access to the motorway from areas of western Cardiff, the Vale of Glamorgan and Cardiff (Wales) Airport. The upgrading of the A48 at Chepstow and the construction of a new crossing of the River Wye, is presently under way and due for completion in the Autumn of 1987. In preparation is the Brynglas Tunnels and Malpas Relief Road project which will deal with potential traffic congestion at the Brynglas Tunnels on the M4 at Newport and reduce traffic through the Malpas resident area of the city. The provisional programme envisages a start on construction before the end of 1990.

ii. Dyfed and West Glamorgan County Councils are undertaking substantial programmes to improve county roads between the Llanelli and Swansea areas and links from these areas to the M4. The A4138 Hendy Link between Llanelli and the M4 was completed in 1984. The present A484 route between Llanelli and Swansea across the Loughor Bridge and through Gorseinon carries a large proportion of commercial vehicles and is congested. Action is being taken to secure its improvement. The A484 Loughor Bridge which is structurally substandard is being replaced by West Glamorgan and Dyfed County Councils. Dyfed County Council are also improving the A484 in the Llanelli area. West Glamorgan County Council are also upgrading the easterly section of the route as well as improving radial routes from the centre of Swansea to the M4 in the north and west. Improvements to the A4067 northerly link to the M4 - the Morrision eastern and Plasmarl by-passes - were completed by 1983. The main stages of the western by-pass to the city centre (ie. the A483 New Cut - Dyfatty - Lion

Street Improvement) were completed by 1984 and the North Dock Interchange, which will be linked to the A483 via a new bridge over the River Tawe, is virtually complete. These schemes will reduce congestion in the city centre by diverting heavy industrial/commercial traffic and will greatly improve access from the Docks to the M4.

iv. In Cardiff, the main thrust of the County Council's programme is to complete the Peripheral Distributor Road (PDR) with links to the M4 in the east and - via the A4232 Culverhouse Cross - Capel Llanilltern trunk road section (see paragraph i) - in the west, in order to improve access to the docklands area in south Cardiff which is being redeveloped. ERDF assistance has been given to several recent road projects within the docklands area and sections of the PDR. Schemes recently completed include the Ely Link (1982) and East Moors Phase II Link (1984). The County Council started work on a major westerly section of the PDR - the Grangetown Link - in 1984/85. The Central Link is due to start in 1986/87 and another main section - the Butetown Link Road is expected to start in 1987/88. Within the Programme period the Council also hope to undertake a number of industrial access schemes in Cardiff, Barry and the Llandow Industrial Estate and construct a new interchange on the M4. In Newport Gwent County Council plan to construct the Docks Way Extension and a connecting link to Kingsway which together with the proposed Malpas Relief Road (see paragraph i above) will provide an improvement access to the docks from the north and east and open up the Old Town Dock area for new industrial development.

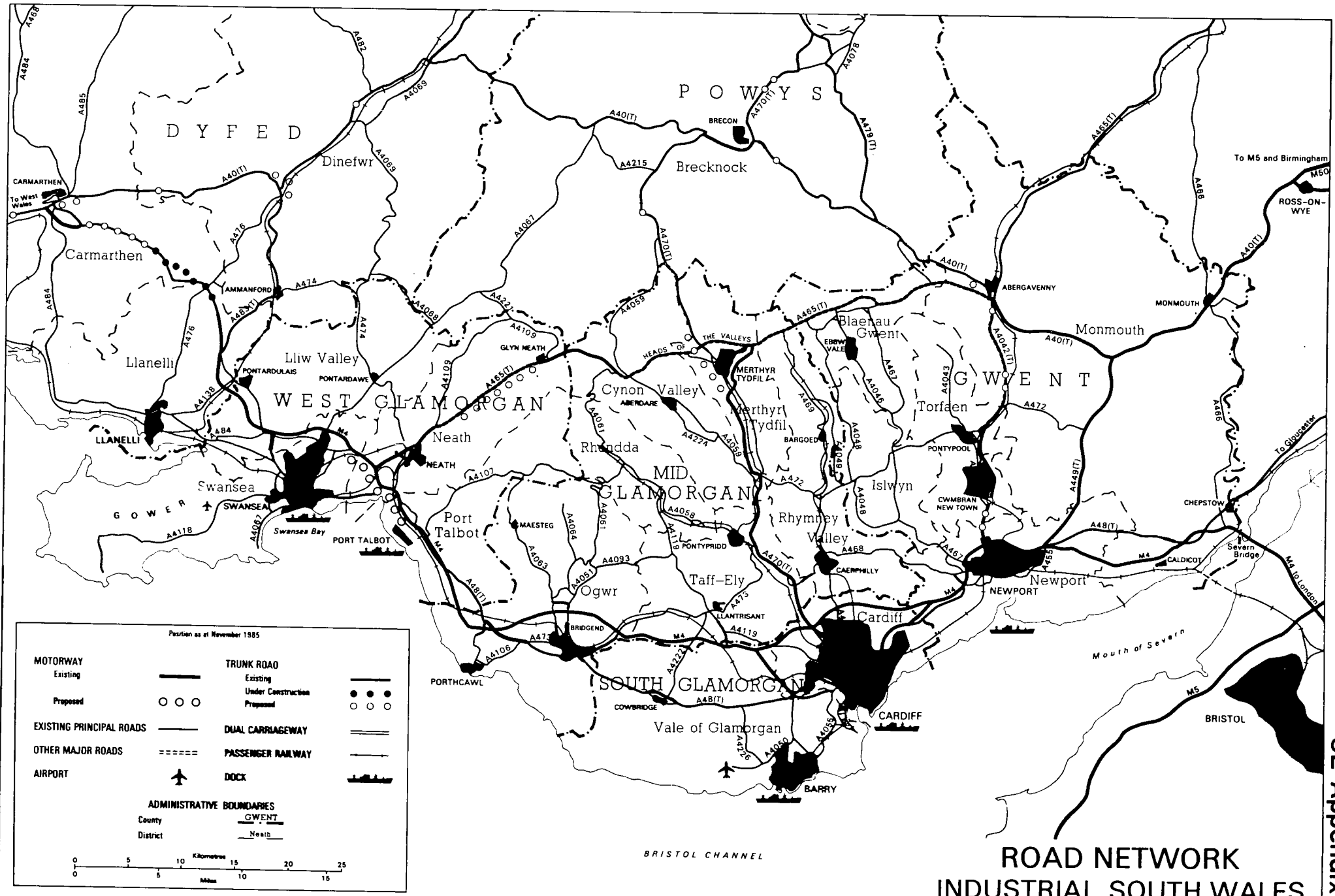
South Wales Valleys

v. A scheme to provide a dual carriageway superseding the substandard Neath River Valley section of the A465(T) between Aberdulais and Glynneath is in preparation and work should start before December 1990. The dualling of the A470 from Cardiff and the M4 to the outskirts of Merthyr was completed when the Abercynon-Pentrebach section was opened in late 1985, and work on the Pentrebach-Cefn Coed section (which will by-pass Merthyr) is expected to start between January 1988 and December 1990. The A4042 New Inn By-pass and associated link roads were opened in June 1982 and further schemes to continue the comprehensive improvement of this route, which links Newport and the M4 to the Heads of the Valleys route at Abergavenny are in preparation.

vi. In the Swansea Valley, the A474 Herbert Street by-pass at Pontardawe was completed in 1983, and the southern section of the A4067 Swansea Valley route is to be improved with work on the first section - Ynysforfan to Glais - starting in 1985/86, and on the second section - Glais to Pontardawe - due to start in 1986/87.

vii. Further east the A4119 Tonyrefail By-pass designed to improve access to the Rhondda Valleys, was completed in early 1986. A second main access to the area, the A4058 cross valley link from the A470(T) westwards, is being improved. Work on the Trehafod By-pass on this route was completed in 1983. The link to the Heads of the Valleys route through the Cynon Valley from the A470(T) at Abercynon has been improved by means of the Abercynon By-pass completed in 1985 and the Aberdare By-pass which will be completed during 1986.

viii. In the most easterly section of the South Wales Valleys, the priority is the comprehensive upgrading of the previously narrow and tortuous A467 route to provide a high standard road from the M4 through Ebbw Vale to the A465(T). Much of this objective has already been achieved with the completion of the Risca-Rogerstone By-pass and the upgrading of the section between Crumlin and Abertillery. Work on the remaining section north to the Heads of the Valleys route is planned to start in 1986/87 (Abertillery-Brynmawr). The A472 east-west route from Pontypool to the A470(T) has also been improved with the Pontymoile - Lower Race scheme south of Pontypool completed in 1982 and Gwent County Council hope to be able to start the adjacent section to Hafodyrynys (near Crumlin) before 1987. Also in the county programme for a start later in the Programme period is the improvement of the A472 cross valley link westwards from Newbridge to Maesycwmer. In addition, work has been completed on Cwmbran Drive, a new road which improves access generally to the new town from Newport and the M4.



Position as at November 1985

MOTORWAY	TRUNK ROAD	
Existing	Existing	Under Construction
Proposed	Existing	Proposed
	Under Construction	Proposed
EXISTING PRINCIPAL ROADS	DUAL CARRIAGEWAY	
OTHER MAJOR ROADS	PASSENGER RAILWAY	
AIRPORT	DOCK	
ADMINISTRATIVE BOUNDARIES		
County	Gwent	Neath
District		

0 5 10 15 20 25
 0 5 10 15 25
 Kilometres
 Miles

ROAD NETWORK INDUSTRIAL SOUTH WALES

INDUSTRIAL SOUTH WALES INDICATIVE MAJOR INFRASTRUCTURE DEVELOPMENTS
1986-90
(PARAGRAPH 8E74 REFERS)

Scheme	1986/7	1987/8	1988/9	1989/90
Trunk Roads				
Chepstow Inner Relief Road and Bridge		complete		
M4 Baglan-Lonlas			start-----	
M4 Brynglas Tunnels and Malpas Relief Road			start-----	
A465/ Abergavenny Western By-Pass A40				start----
A465 Glynneath-Aberdulais Improvement			start-----	
A470 Pentrebach-Cefn Coed Improvement			start-----	
A4042 Penperlleni By-Pass				start----
A4042 Llantarnam By-Pass				start----
Principal Roads				
A474 Lamb Inn - Dyfed County Boundary	start-----		complete	
A476 Capel Bethania - Tyle Peregrine			start---	complete
A484 Kidwelly By-Pass	start-----			complete
A484 Star Hotel - Trostre - Halfway	-----	complete		
A484 Loughor Bridge & Approaches	-----			complete
A484 Swansea Castle - Star Hotel		start---	complete	
A484 Trostre - Loughor Bridge			start-----	
A4138 Dafen - Felinfoel Link	start---	complete		
A467 Risca - Rogerstone	start---	complete		
A467 Crumlin - Aberbeeg	complete			
A467 Aberbeeg - Abertillery	start---	complete		
A467 Abertillery - Brynmawr	start-----			complete
A4042 Docks Way - Kingsway		start-----		
A472 Newbridge - Maesycwmer				start----
A4077 Crickhowell Bridge to Vine Tree Inn	complete			
Ely Link	complete			
East Moors Link Phase II	complete			
Grangetown Link	-----	complete		
Central link	start-----		complete	
Butetown Link		start-----		
A474 Neath Inner Urban By-Pass: Site Investigation	---complete			
Main Scheme		start---	complete	
A483 North Dock Improvement: Stage 1, Second Tawe Bridge	---complete			
Stage 2, Victoria Road to Oystermouth Road		start---	complete	
A483 Carmarthen Road, Bryn Road to Fforestfach Cross	---complete			
A484 Lougher Bridge and Approach Roads	start-----		complete	
A484 Llanelli Link Stage 2 (Lougher By-Pass)			start-----	

Scheme	1986/7	1987/8	1988/9	1989/90
Principal Roads (cont'd)				
A4067 Ynysforgan to Glais, Phase A	---complete			
A4067 Glais to Pontardawe, main scheme		start	---complete	
A4067 Pontardawe to Godre'r Graig			start	-----
A4067 Cross Valley Link at Pentrechwyth				start
A4068 Commercial Street, Ystalyfera	---complete			
A4107 Croeserw Bends, Cymmer	---complete			
A4107 Cynonville to Dyffryn Afan	---complete			
A4107 Lletti Harry Stage 2: Site Investigation		complete		
Main Scheme		start	---complete	
A4216 Sketty Lane Improvement	---complete			
Hollybush/Ty Coch Link		start	---complete	
A483 Carmarthen Road, Fforestfach Cross to Ivorites			start	-----
A4069 Lower Brynamman, Park Street				complete
A4107 Cwmavan Junction with B4282				complete
A4107 Lletti Harri, Stage 3				start
A4107 Oakwood Pontrhydyfen access				start
A4109 Seven Sisters Diversion				start
A4118 Junction Sketty Park Road and Gower Road				complete
A4118 Penmaen Hill, Gower				start
A4118 Gower Road, Sketty Cross to Sketty Park Road				start
A4118 Gower Road, Killay Square to Railway Bridge				start
A4118 West Perimeter Stage 2				start
Other Roads				
B4306 Pontyberem Square - School		start	---complete	
B4306 Plough Bridge, Pontyberem			start	---complete
C2141 Station Road, Glanaman	complete			
Cross Hands Business Park Interchange		complete		
Llanelli Southern By-Pass	complete			
Pembrey Peninsula Link Road		start	-----	
C199 Station Road Diversion, Ystradgynlais		-----	complete	
C136 Plas Bends, Llangattock Stage II	complete			
Hayes Road Phase II	start	---complete		
A4222 Aberthin By-Pass	start	---complete		
B4270 Llysworney Improvements			start	---complete
B4265 Gileston Improvement				start
Thornhill Interchange				start
Ferry Road Improvement Phase III	start	---complete		
B4282 Royal Oak, Bryn	start	---complete		
B4291 Birchgrove Road/Drummau Road	complete			
B4291 Birchgrove Road at Heol Las			start	---complete
B4295 Swansea Road, Waunarlwydd Stages 2 & 3	---complete			
Class 'C' Mynydd Newydd/Heol Ddu, Swansea		start	---complete	
Class 'C' Main Road, Bryncoch		start	---complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Other Roads (cont'd)				
Cwmbran Drive Phase II	start-----			complete
Cwmbran, Hollybush/Tycoch Link	start---	complete		
Penarth Dock:				
Main access improvements Phase 2	complete			
Road Link to Southern Plateau	complete			
Access from Paget Road	complete			
Industrial sites access:				
Gilwern Park	complete			
Magor		complete		
Portskewett		complete		
Usk	complete			
Newport, Former Power Station, provision of industrial access road	start-----			complete
C151 Ponty-llwyn, Pontsticill	complete			
B4489 Llangyfelach Road, Below Heol Gwyrosydd				start---
B4295 Gowerton Inner By-pass			start---	complete
Industrial Developments				
Hadfield Road/Brindley Road Industrial Site (Cardiff)	start-----			complete
Lamby Way Industrial Site (Cardiff)		start-----		complete
St Mellons Industrial Site (Cardiff)	complete			
Cardiff World Trade Centre		start-----		complete
Cardiff, Small Workshops and Environmental Improvements	start-----			complete
Curran Embankment Industrial Estate - Programme of Improvements		start-----		complete
Cardiff Technology Centre	start---	complete		
Port Talbot Industrial Estate Improvement	-----			complete
Port Talbot Endeavour Close Starter Units	complete			
Neath, Small Units	ongoing-----			
Cwmbran, Llantarnam Park Site Preparation	complete			
Cwmbran, Factory Refurbishment programme	complete			
Abergavenny, Brecon Road Industrial Site	start---	complete		
Abergavenny, Heads of the Valley Industrial Site			start-----	
Abergavenny, Prestige Site		start-----		complete
Usk, Pontypool Road Industrial Estate		start-----		complete
Caldicot, Industrial Estate			start---	complete
Portskewett, Prestige site	start---	complete		
Magor, Prestige site		start---	complete	
Caldicot, Pill Farm Estate workshop units	---complete			
Pwllidu, Industrial Refuse Tip	start---	complete		
Cross Hands Business Park:				
Phase 2	---complete			
Phase 3		start-----		

Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments (cont'd)				
Llanelli, Trostre Industrial Park, Phase 2	start-----			
Capel Hendre:				
Small Factory Units	---complete			
Secure car parking area		complete		
Lindsey Drift Mine		complete		
Glanamman, conversion of former CI Fastners factory				
Phase II, provision of 13 units, and landscaping	---complete			
Glanamman Workshops, provision of management services at former CI Fasteners factory	ongoing-----			
Risca, Birds Workshops				
Phase 2	---complete			
Phase 3	start---complete			
Pengam, St David's Workshops				
Extension				
Phase 1	---complete			
Phases 2 & 3	complete			
Penyfan Industrial Estate workshops		complete		
Blackwood Business Park, redevelopment of switchgear Business Park	start---complete			
North Celynyn Colliery Site Development		start---complete		
Newbridge Road Industrial Site			start-----	
Pontywaun Farm Industrial site	start-----	complete		
Buttery Hatch Industrial Site			start-----	
Pontllanfraith, Conversion of former ASL premises	complete			
Small units:				
Cwmtillery Valley, Abertillery 4,000 sq ft	---complete			
Crown Avenue, Tredegar		start-----	complete	
Blaenant, Brynmawr		start-----	complete	
Rising Sun, Blaina		start-----	complete	
Land Reclamation:				
Bryn Serth, Tredegar	start-----	complete		
South End of Steelworks, Ebbw Vale	start-----			
Cwmtillery Colliery, Abertillery	start-----	complete		
Barry, Chemplex Chemical Park		start-----	complete	
Barry, Palmerston Estate (Phase 2)		complete		
North East Barry, Employment Park				start---
Penarth Dock:				
Starter Units	complete			
River Works	complete			
Infill Industrial Units Industrial Development, southern plateau			start---	complete
Factory Refurbishment	start-----			complete

Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments (cont'd)				
Swansea, Industrial Improvement area Infrastructure				-----complete
Swansea, Enterprise Zone				-----complete
Swansea, Directorate of Trade and Industry				ongoing-----
Cardiff, Lewis Road/Freshmoer Road	---complete			
Caerphilly, Access to Pontypandy Farm Estate	---complete			
Chepstow, Newhouse Farm Estate	Start	---complete		
Cardiff, Culverhouse Cross	Start	---complete		
Newport, Jackspill Industrial Estate Phase II			complete	
Phase III (part only)		start	---complete	
Newport, Old Town Dock, industrial units			complete	
Newport, Rogerstone Power Station, industrial site development			start	-----
Newport, BSC Orb Works, industrial development		start	---complete	
Newport, Riverside, provision of industrial units (part only)			complete	
Newport, industrial estate landscaping	ongoing	-----		
Provision of factory units:	ongoing	-----		
Treherbert Industrial Estate				
Ystradfechan Industrial Plateau				
Tylorstown Industrial Plateau				
Ynys Field Industrial Plateau				
Tydraw, Treherbert				
Gelli Industrial Estate				
Landscaping of industrial estates	-----	complete		
Highfield Estate, Ductair Extension		complete		
Commercial Improvement Areas	ongoing	-----		
Treorchy/Ferndale Tips, completion works		start	---complete	
Nantygwyddan, development on land fill site		complete		
Newport, Dyffryn, infrastructure and access works	---complete			
Industrial site servicing:				
Gilwern Park		complete		
Magor			complete	
Portskewett			complete	
Tregwilym Road, Rogerstone			complete	
Bridgend/Ogwr, infrastructure on existing industrial estates			ongoing	-----
Brynmenyn Industrial Estates:				
Phase II infrastructure			complete	
Phase III infrastructure			complete	
Extension				complete
Garw Colliery Site Infrastructure			complete	
Ystradgynlais, Enterprise Workshops	start	---complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments (cont'd)				
Workshop complexes:	start-----complete			
Dafen				
Pontyberem				
Duport				
Llanelli Skill Centre				
Llangennech Hi Tec Park	-----complete			
Cross Hands Workshop Units	start---complete			
Llanelli, Trostre Industrial Park, Workshop Units	start---complete			
South Pontypool Industrial Park:				
Phase II (provision of small units)	complete			
Redevelopment of Merchant's Hill/ Pontnewynydd Depot Site	start-----			
Barry Area:				
Industrial promotion and incentives to industry schemes	start-----			
Development partnership with International Thomson	start-----			
Gorslas Industrial Estate:	start-----			
Provision for further nursery units				
Geological survey and possible remedial works				
Feasibility study into and possible development of Regional Agricultural Trading Centre	start-----			
Tourism				
Duport, Land Reclamation	ongoing-----			
Ash Ponds Reclamation	start-----			
Pembrey Country Park	ongoing-----			
Kidwelly Welsh Motor Sports Centre, extension	ongoing-----			
Kidwelly Industrial Museum, facilities and visitor centre	ongoing-----			
Llanelli, Machynys Wildfowl Centre, provision of facilities	ongoing-----			
Kidwelly Quay	complete			
Trimsaran Golf Course	ongoing-----			
Llanelli Leisure Centre, development of all weather facilities	-----complete			
Llanelli/Cynheidre Steam Tourist Railway	start-----complete			
Tintern Abbey, environmental improvements/car and coach parking	start-----complete			
Caerwent Coach Park	start---			
Caldicot, Newport Road, pedestrianisation	start---			
Govilan, Garndry's iron works interpretive scheme	complete			
Chepstow, Lower Chepstow car park	complete			
Abergavenny, High Street pedestrianisation	complete			
Chepstow, Riverside Walk enhancement	complete			

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (cont'd)				
Pedestrianisation of Ebbw Vale Town Centre				-----complete
Ystrad Fawr Tip Reclamation		complete		
Trecatty Refuse Disposal Site	start	-----complete		
Port Talbot, Aberavon Seafront, Environmental Improvements				ongoing-----
Port Talbot, Afan Lido Complex Redevelopment				ongoing-----
Port Talbot Town Centre, Redevelopment	start	-----complete		
Neath, Restoration of Neath Canal and development of leisure park	start	-----		
Neath, Environmental Works		start	-----complete	
Tretower Court and Castle Redevelopment			-----complete	
Cwmcam Scenic Drive Entrance Area	-----complete			
Log Cabin Complex		start	-----complete	
Ynys Hywel Farm, conversion to field study centre		complete		
Penyfan Park, Recreational Centre				start-----
Cardiff, Tourism Infrastructure: toilets, information points, etc, coach park, improvements to Bute Park, Cefn Onn, etc				ongoing-----
Cardiff, Central Library Site, adjunct to St Davids's Hall, Cardiff Heritage Centre, Cardiff Tourism and Conference Bureau etc				ongoing-----
Cardiff, Leckwith Sports Complex		start	-----	
Cardiff, Wales Railway Centre	start	-----complete		
Swansea, River Tawe Barrage			start	-----
Swansea, Ashland Chemical site, park		start	-----complete	
Swansea, Maritime Quarter Development			-----complete	
Lower Swansea Valley Reclamation, Archaeological Park and Museum				ongoing-----
Swansea, Regional Sports Complex				-----complete
Swansea, Airport Development, Wales Air Museum				start-----
Swansea, Grand Theatre Arts Complex	ongoing	-----		
Swansea Bay Recreation Plan		-----complete		
Swansea Museum Service	ongoing	-----		
Swansea, Clyne Country Park	ongoing	-----		
Swansea, Refuse Boiling Plant	start	-----complete		
Swansea, Strand/North Dock, City Centre Park				-----complete
Swansea, City Centre, pedestrianisation and revitalisation				-----complete
Swansea, Multi-storey car parks	ongoing	-----		
Barry Old Harbour, Waterfront Development				start-----
Penarth Dock, Marina	start	-----		
Barry and Penarth, environmental improvements	start	-----		

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (cont'd)				
Ogmore-by-Sea, car park improvements	start	complete		
John Street, Porthcawl:				
Provision of rear service road	complete			
Pedestrianisation		complete		
Monmouthshire and Brecon Canal, restoration and, structural works	start	complete		
Big Pit Mining Museum/Blaenavon Heritage Project, Development of attractions and interpretive facilities				complete
Blaenavon, water amenity project		start		complete
Lewis Merthyr/Ty Mawr Heritage Museum	start			
Rhondda, car parks	start			
Wattstown, footbridge		complete		
Barry/Penarth Area:				
Tourism promotion scheme	start			
Ynyscedwyn Tinplate Works scheme	start	complete		
Machynys Peninsula Reclamation				start
Loughor Estuary water sports complex				
Feasibility Study		start	complete	
Burry Port Marina				start
Carmarthen Bay Power Station, Burry Port		start		
Rail				
Thornhill Station	complete			
Eastbrook Station	start	complete		
Light Rapid Transit System			start	
Cwmbran, Railway Station	complete			
Cardiff & Valleys lines, Track & signalling modernisation	start			
Cardiff and Valleys lines, New Stations	start	complete		
South Wales Main Line and associated branches, modernisation of level crossings, track and signalling	start			
Margam Freight Depot, modernisation		complete		
Modernisation of servicing depots:				
Swansea		complete		
Cardiff (Canton)	start	complete		
Cardiff (Cathays)	start	complete		
Public Transport				
Llanelli, Town Centre Bus Station redevelopment				complete
Ports				
Ports facilities and infrastructure improvement and development:				
Newport:				
Refurbishment of outer sections of lead - in jetties	ongoing			
Refurbishment of quayside cranes				

Scheme	1986/7	1987/8	1988/9	1989/90
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Ports (cont'd)

Replacement of Middle Gates, South Lock
 New Engineering Workshops
 Reconstruct root of west jetty
 New Docks roads
 Surfacing adjacent to former
 Nos 10 and 11 coal hoists
 Widening of passage to North Dock
 New stores building
 Surface Hospital Corner
 Paving of Jamaica Terminal

Cardiff:

Reconstruction of Roath Dock Road
 Replacement of mobile and quayside
 cranes

Barry:

Replacement of impounding pumps
 Overhaul of outer lock gates
 Renovation of inner lock gates
 Transfer of grabbing crane to
 No 4 Berth
 Extension of No 31 Berth involving
 removal of former railway
 embankments
 Modernisation of No 31 Berth including
 flush surfacing of crane tracks
 Provision of container handling
 facilities (Scotch Derrick and
 container spreader)

Port Talbot:

New Drainage works

Swansea:

Drainage schemes phases 2-6
 New Harbour Office
 Construction of new roads

Water & Sewerage

Taf Fawr Reservoir Improvements	-----complete
Georgetown Water Treatment Works Pretreatment	complete
Crickhowell supply, Service Reservoir	-----complete
Cefn Mably Water Supply	-----complete
Wye Abstraction, Pumping Station	complete
Court Farm Link Mains, Civils	-----complete
Court Farm Work Phase 2	-----complete
Monkswood Usk Water Main	-----complete
Coed y Paen Tank	complete
Usk Service Reservoir	start-----complete
Caldicot Service Reservoir and Mains	---complete
Wentworth Water Treatment Works Contact Tank	start-----complete
Chepstow Water Supply Phase 2	---complete
Llantarnam No 2 Reservoir	-----complete
Rhiwderin Service Reservoir	-----complete
Maerdy Water Treatment Works Improvements	-----complete

Scheme	1986/7	1987/8	1988/9	1989/90
Water and Sewerage (cont'd)				
Sor Pumping Station	-----	complete		
Bunkers Services Reservoir (Blaenavon)	-----	complete		
Blaenavon Mains Phase 2	---	complete		
Pontypool West, Pipelines				complete
St Hilary/Cowbridge	---	complete		
Pontlottyn, Rhymney Valley Sewer		start	---	complete
Rhymney Valley Trunk Sewer				start
Penarth Sewage Disposal Phase 1		start	---	complete
Barry West Sewage Disposal, Town	-----	complete		
Penarth Sewage Disposal: Phase 2	-----			complete
Phase 3	start	-----	complete	
Barry East Rising Main			start	---
Abergavenny Sewage Treatment Works, Sludge	start	-----		complete
Pentthir Sewage Treatment Works Extensions				complete
Ely Valley Sewer and Sewerage Disposal, Miskin Sewage Treatment Works	-----	complete		
Lavernock Long Sea Outfall	Ongoing	-----		
Lavernock Geographical Investigation	-----	complete		
Barry West Sea Outfall	-----			complete
Llandegfedd Recreation Centre				complete
Court Farm Water Supply		start	-----	complete
River Rhymney, Ystrad Mynach, flood protection	---	complete		
South Butetown Pumping Station	-----			complete
Butetown Main Sewer	-----			complete
Storm Water Overflow Screens				start
Pontycynon Pipe Bridge By-Pass	-----	complete		
Blackwood High Street Sewer Improvements	---	complete		
Swansea Road, Merthyr Sewer Improvements	---	complete		
Gelli Trunk Sewer Phase 1 & 2	-----	complete		
Treorchy Storm Water Overflow	---	complete		
Pontylottyn Sewer Improvements	start	-----	complete	
Miskin Sewer Phase 1 & 2	start	-----		complete
Talbot Green Sewerage Improvements	---	complete		
Duffryn Cleppa Park, Off-site sewer	-----	complete		
Velindre, Pyle Main Improvements	-----	complete		
Cray Trunk Mains	-----	complete		
Capel Dewi, Water Treatment Works Improvements	-----	complete		
Ebenezer Service Reservoir, Extension	-----	complete		
Bynea, 15" Main to Coedcae	---	complete		
Trostre Main-Star Hotel, Water Supply	---	complete		
Gwaun-cae-Guerwan, Booster Station	---	complete		
Ystradfellte Treatment Plant				complete
Pyle to Porthcawl Main, Phase 3			start	---
Sarn Booster Modifications			complete	
Llangyfelach to Fforestfach Trunk Main	---	complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Water and Sewerage (Cont'd)				
River Afan Outfall Collection Sewers, 1 & 2	---complete			
Llynfi Valley, Sewer to Penybont Trunk Sewer	complete			
Gowerton Works, Phase 2 Modifications Porthcawl, Sewers & Sewage Disposal			complete	
Llynfi Valley - Lletty Brongu Sewage Treatment Works Improvements	---complete			
Penybont Works, Sludge Disposal			start	---complete
Afan Flood Protection Scheme				-----complete
Ogmore Flood Protection Improvements, Phase 1	---complete			
Baglan Brook Phase 3, Drainage	-----complete			
Capel Hendre Reconstruction Work			complete	
Station Road Trunk Sewer, Phase 1	---complete			
Neath Valley Sewer Scheme, Skewen Trunk Sewer	---complete			
Windsor Road Neath, Sewer Replacement			start	-----complete
Neath Valley Sewer Scheme: Penrhiwtwyn Pumping Station	---complete			
Trunk Sewer to Cadoxton	-----complete			
Kingsway Storm Water Overflow Improvements				complete
Main Trunk Sewer Storm Water Overflow				-----complete
Main Trunk Sewer, Surcharge Relief Scheme				-----complete
Main Trunk Sewer Emergency Storm Water Overflows				-----complete
Llansamlet Pumping Station Rising Main			start	---complete
South Cornelly Foul Sewer Requisition	start	---complete		
Rhondda, Land Drainage		start		-----
Sewerage Schemes: Capel Dewi		start		-----
Llanarithney				-----
Llangydeyrn, water supply scheme		start		-----

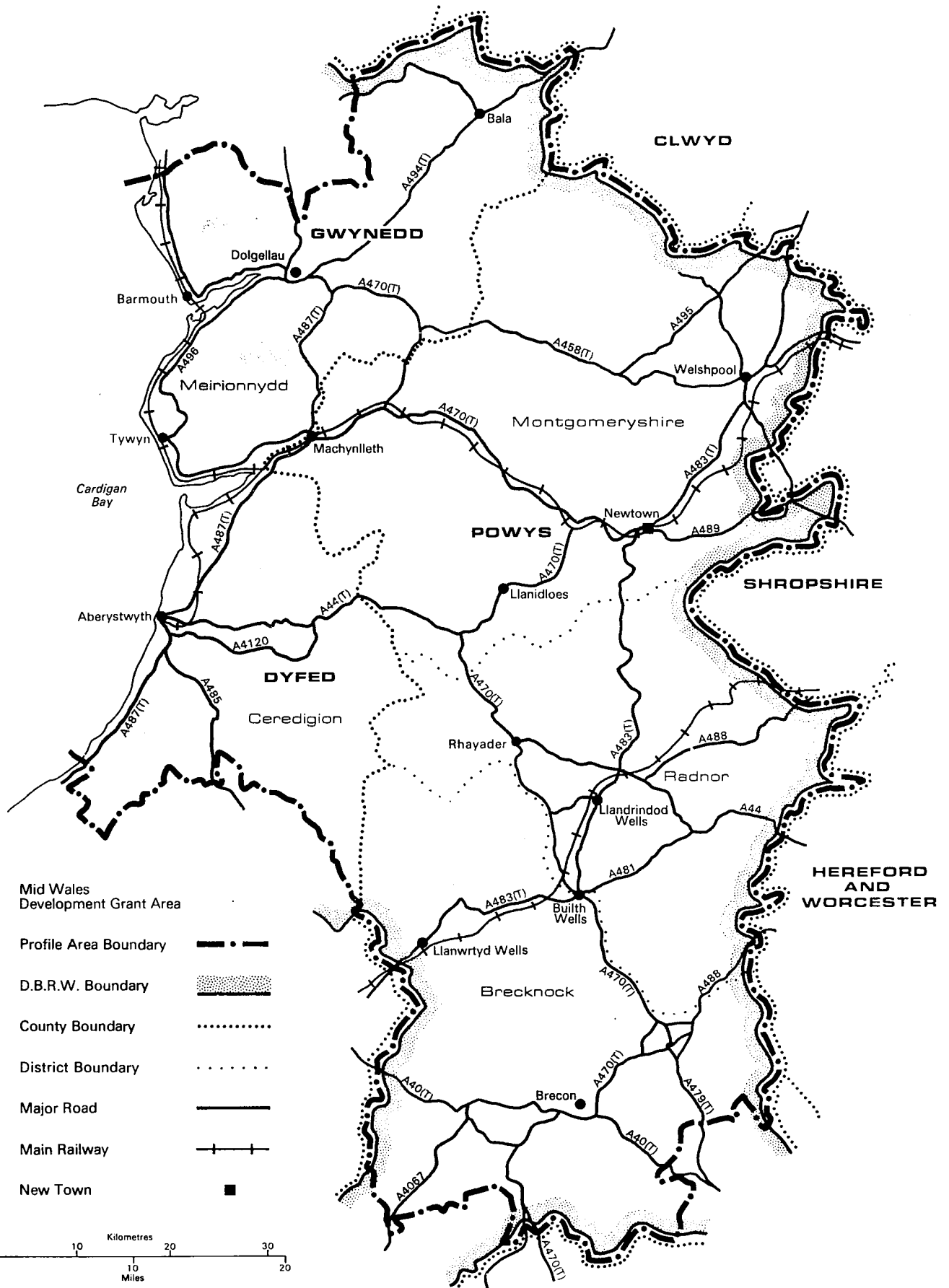
Electricity

132KV Steel Tower Double Circuit Overhead Line Reconductoring: Aberthaw/Upper Boat 5.6km	---complete
Upper Boat/Mountain Ash 7.0km	---complete
Cardiff East/Newport 16.6km Phase 1	---complete
Phase 2	-----complete

Scheme	1986/7	1987/8	1988/9	1989/90
Electricity (Cont'd)				
Cardiff East/Upper Boat 12.3km	start	complete		
Uskmouth/Sudbrook 12.8km		start	complete	
Crumlin/Ebbw Vale 3.7km			start	complete
Bridgend/Pyle 12.3km	start	complete		
Briton Ferry/Tir John 11.4km		start	complete	
Tir John/Swansea North 4.1km		start	complete	
Swansea North/Carmarthen Bay 6.4km			start	complete
Carmarthen Bay/Carmarthen 21.7				start
Upper Boat/Llanfabon, New 132KV Double Circuit Line	complete			
Telecontrol Systems	ongoing			
Microwave Telecommunications Systems	ongoing			
Caerphilly Area Reorganisation	complete			
Cardiff East Reorganisation	complete			
Newport East Reorganisation			complete	
Cardiff North, New 132/11 KV Reinforcement		start	complete	
New 132KV substations: Forest Farm (Cardiff)			start	complete
Trowbridge (Cardiff)		start		complete
Pencoed		start		complete
Pontymister/Rogerstone Area, Reorganisation	complete			
Briton Ferry/Giants Grave Replacement 33KV Line	complete			
Swansea Area Reinforcements: Upper Bank/Llansamlet	complete			
Tir Pentre/Ynysforgan	start			complete
Gethin St/Strand			start	
Bridgend/Pyle Area, Reorganisation			start	
Grange/Llynfi 2nd 66KV Circuit	complete			
Llanelli Transformer Reinforcement		start	complete	
District Schemes for 11KV and LV system reinforcements	ongoing			
Gas				
Gas Reinforcement: SE Wales Phase 3 (Nelson to Nantgarw)	start			complete
Swansea Phase II: Oystermouth to Elba		start		complete
Jersey Mains to Elba		start		complete
Cwmbran	start	complete		
Newport	start			complete
Rhondda (Porth)		start	complete	
Cefn Onn to Nantgarw	start	complete		
Baglan to Port Talbot	start	complete		
Ystradgynlais	start	complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Gas (Cont'd)				
Pontycymmer		start	complete	
Maesteg and Cymmer Phase II		start	complete	
Pressure Reduction Station Work:				
Rhiwderin/Crindau		start	complete	
Gilwern Village		start	complete	
Llandybie		start	complete	
Telecommunications				
Rhondda, Telecommunications:				
Base Station		start	complete	

MID-WALES PROFILE AREA



Aided Area Profile**WALES - MID WALES****Statistical summary**

Area (hectares)				684,894
Usually resident population				137,365
Density (persons per hectare)				0.201
Unemployment	June 1983	June 1984	June 1985	
Thousands	5.1	5.4	5.9	
Rate	10.5	11.0	12.2	
Index (UK = 100)	84.7	88.0	93.1	

Employment profile 1981 (SIC 80 Divisions)

	Thousands	per cent
Agriculture, forestry and fishing	5.2	11.8
Energy and water supply	1.2	2.6
Extraction of minerals, manufacture of metals, chemicals and man-made fibres	0.8	1.7
Metal goods, engineering and vehicles	2.3	5.3
Other manufacturing	3.6	8.2
Construction	1.6	3.7
Distribution, hotels and catering, repairs	8.0	18.1
Transport and communications	2.1	4.6
Financial services	1.9	4.2
Other services	17.6	39.7
<hr/> TOTAL <hr/>	44.3	100.0

Source: Census of Population 1981

Area definition by travel-to-work area and status:

Aided areas: Aberystwyth; Brecon; Dolgellau and Barmouth; Llandrindod Wells; Machynlleth; Newtown, Welshpool.

MID WALES AIDED AREA

SECTION 1 - SOCIAL AND ECONOMIC ANALYSIS

A. DESCRIPTION

Geography

8F1. The Mid Wales non-assisted area includes virtually all of the County of Powys, together with the northern half of the district of Ceredigion in Dyfed and the greater part of the district of Meirionnydd in Gwynedd. The profile area is bordered by Assisted Areas along most of its southern boundary and to the north-west and north-east; to the West lies Cardigan Bay and to the east are the rural parts of the English Midlands. It lies wholly within, but is not contiguous with, the area of operations of the Development Board for Rural Wales (also known as Mid Wales Development).

8F2. Essentially, the area is rural with only small towns and is characterised by a scatter of remote small settlements and isolated farmsteads in attractive but often bleak hill country. Though it occupies about one third (684,894 hectares) of the land area of Wales it contains only 5 per cent of the population. Over 70 per cent lies above 240 metres and the majority of the sub-region is included in the Less Favoured Area defined in Directive 75/268.

8F3. Mid Wales includes a great deal of highly attractive scenery, particularly part of the Snowdonia and Brecon Beacons National Parks, the Upper Severn and the Wye Valleys, the Cambrian Mountains and the Berwyn Hills. The largest towns are Aberystwyth, a university town of some 11,000 people, and Newtown, a designated new town with a population of some 9,000. The most enduring characteristic of the dispersed settlement pattern is the remoteness of the hamlets from even medium-sized urban centres. Birmingham in England and Industrial South Wales lie 100-150kms distant and the Mid Wales area is some 350kms from London.

Communications

8F4. The east-west routes linking the area with the industrial centres and English motorway network include the A458(T), A40(T) and A44. Internally, the main north-south links are the A470(T), the A487 coastal route from Fishguard to Bangor linking the coastal area with the Irish ferry ports of Fishguard and Holyhead and the A483 Swansea - Manchester Trunk Road. A network of county roads connects the larger villages with the trunk road system; a number of bridges on these county roads are in a deteriorating condition and concern has been expressed about the funds needed to introduce a phased programme of replacement.

8F5. The major railway in the area (the Mid Wales Line) runs westwards from Shrewsbury in England through the Mid Wales towns of Welshpool, Newtown and Machynlleth to the coast where it divides, branching south to Aberystwyth and northwards as the Cambrian Coast Line along the Cardigan Bay Coast to Pwllheli. The only other railway (Central Wales Line) traverses the southern part of the area connecting many communities along its route with Shrewsbury in England and Llanelli in industrial South Wales. There are no commercial ports or airfields in the area though a new airfield is proposed for Caersws near Newtown.

Population

8F6. The home population of the Mid Wales aided area is estimated to be almost 154,000 (mid 1984), 94,000 of which were of working age. Since 1974 the population has increased by 6 per cent; the rise was due entirely to immigration in the 1970s which more than compensated for the area's natural decline (an excess of deaths over births). The latest (1983 based) population projections at a county level suggests that by 1991 the population of Powys may increase by 2.6 per cent, with the working age population increasing by 2.9 per cent (almost 2,000 in number).

Table 1. Population age distribution

thousands

Population Broad Age Groups(1)	Mid Wales		DBRW area	
	1974	1984	1974	1984
0-14	30.5	27.6	40.3	36.5
15-59/64	84.9	94.1	112.3	124.4
60/65+	29.9	32.3	39.7	42.9
All Ages	145.2	153.9	192.3	203.8

Population Change(2)	Mid Wales		DBRW area	
	1974	1984	1974	1984
Total Change	8.7		11.5	
Natural Change	- 3.9		- 5.2	
Balance	12.6		16.7	

Mid Wales (Aided Area) = DBRW less Brecknock wards 20, 21, 23, 24
less Montgomery wards 4-6, 9-11
less Ceredigion wards 4-8, 10-14, 19, 25-34

(1) 1974 and 1984 estimates obtained by applying Mid Wales proportion of DBRW as at 1981 Census.

(2) Mid Wales total change over 1974-1984 period is 75.7% of DBRW total change. This percentage was applied to obtain natural change and balance.

Income

8F7. The Second Periodic Report on the Regions of Europe shows that on the basis of a synthetic index measuring the relative intensity of regional problems in the Community a group of four Welsh counties (partly included in the profile area ie. Clwyd, Dyfed, Gwynedd and Powys) are ranked 23rd in the Community out of 131 regional areas.

8F8. Average earnings are not available for the exact area of Mid-Wales, but the three areas listed in the table cover all the component TTWA's. Very little data is available for female earnings mainly for reasons of sample size, but the male averages shown indicate that the wage levels are consistently lower than the Wales level and considerably below the GB average.

Table 2. Average Gross Weekly Earnings of full-time adults(a)
 £per week in April

	Males			Females		
	1977	1981	1985	1977	1981	1985
Dyfed (excl.Llanelli)	69.7	129.7	172.4	(b)	83.9	120.0
Powys	66.4	119.3	(b)	(b)	(b)	(b)
Gwynedd	74.4	127.4	174.5	(b)	(b)	(b)
Wales	76.5	132.7	179.1	50.2	87.5	118.8
Great Britain	78.6	140.5	192.4	51.0	91.4	126.4

Source: New Earnings Surveys

(a) Full-time men aged 21 and over and full-time women aged 18 and over (age at 1 January 1977 and 1 January 1981) and full-time men and women on adult rates for 1984, whose pay for the survey pay-period was not affected by absence.

(b) Results are only published for areas regularly represented by 100 or more people in the sample and where the standard error of average gross weekly earnings does not exceed the 4.0 per cent of the average.

Industrial Structure

8F9. The civilian working population of Mid-Wales in April 1981 was 67,500 or 5.8 per cent of the overall Wales total.

8F10. The number of employees in employment in this area rose slightly between 1977 and 1981 but this net gain hid a mixture of gross movement both ways. The largest absolute increase was in the service sector which gained 2,300 employees. In contrast, the construction industry lost 900 and engineering and allied industries 500 employees. The pattern of employment differs markedly from both Wales and GB, in having large service and agricultural sectors and small proportions in the industrial sectors.

Table 3. Industrial structure

Total percentage of Employees in Employment	Mid Wales		GB	
	1977	1981	1977	1981
Agriculture, forestry and fishing	11.0	11.0	1.7	1.6
Mining and quarrying	0.7	0.7	1.6	1.6
Metal manufacture	0.9	1.1	2.2	1.5
Engineering and allied industries	6.1	4.8	14.7	13.2
All other manufacturing	8.2	8.6	15.4	13.6
Construction	6.1	3.8	5.6	5.3
Gas, electricity and water	2.6	2.5	1.5	1.6
Service industries	64.5	67.6	57.3	61.4

Source: Censuses of employment (excludes self-employed)

B. ECONOMIC AND SOCIAL ASSESSMENT

8F11. Mid Wales' fundamental problem of low income levels and a restricted economy stems from its scattered and extremely sparsely distributed population, its terrain, its remote position, and the difficulties of communication imposed by these factors. Historically, depopulation has compounded the situation. The problems can be summarised primarily as:-

- i. a narrow employment base and lack of opportunity;
- ii. inadequacies in infrastructure, particularly communications and support services;
- iii. social problems associated with sparsity and rurality.

Each of these is treated separately below.

i. Employment

8F12. In net terms, overall employment increased slightly in Mid-Wales between 1977 and 1981. This net gain was largely made up, however, of a rise in service sector employment of over 2,000 and falls in the construction sector of almost 1,000 and in engineering and allied industries of 500 employees. Gains of a few hundred in 'all other manufacturing' and 'agriculture, forestry, fishing' help to complete the picture. The service sector now employs over two thirds of those in employment and the 'engineering and allied' and 'construction' industries now cover only 4.8 per cent and 3.8 per cent respectively, whereas they had both employed over 6% in 1977.

Table 4. Employment Structure

	Employees in Employment Mid Wales		% change
	Thousands 1977	1981	
Agriculture, forestry and fishing	4.7	4.9	+ 4
Mining and quarrying	0.3	0.3	-17
Metal manufacture	0.4	0.5	+36
Engineering and allied industries	2.6	2.1	-20
All other manufacturing	3.5	3.8	+ 6
Construction	2.6	1.7	-37
Gas, electricity and water	1.1	1.1	+ 8
Service Industries	27.6	29.9	+ 8
All employees in employment	42.8	44.2	+ 3

Source: Censuses of employment (excludes self employed)

8F13. Though this is a large geographic area manufacturing activity is concentrated in the relatively few larger population centres such as Newtown, Llandrindod Wells, Welshpool, Builth Wells and Brecon. The manufacturing sector provides only around 15 per cent of jobs in the area as a whole, but because these are largely concentrated in the population and commercial centres selected as growth areas (see para 8F42) the industry makes a vital contribution to employment opportunities and the retention of population.

8F14. The manufacturing industry is very largely a product of post war development with the movement into the area of mobile industry from outside Wales particularly in the late 1950's and early 1960's. Investment in the area from outside has remained a feature but local indigenous growth, and expansion has become significant.

8F15. The evidence available suggests that employment in manufacturing in the area has at least stabilised at around 1981 levels. This has resulted primarily from net employment gains at existing establishments, and in particular from employment growth in the clothing industry. Job losses from closures alone substantially outweighed job gains from new openings, mainly because of the impact of a single large closure.

8F16. The major manufacturing activities in the area are clothing, electrical and electronic industries, food processing, metal goods, mechanical engineering and timber and wooden furniture industries.

8F17. There are a relatively large number of smaller manufacturing plants, with large plants being a significant feature of only the engineering and clothing industries, and within the clothing industry there is one dominant company. However, smaller new employers including new enterprises, are beginning to make a significant contribution to job opportunities. For the short term, prospects in the manufacturing sector will be heavily dependent upon the prospect in the clothing industry. In the longer term the area will need to look increasingly to indigenous, small scale development for future job opportunities,

8F18. The employees in employment figure understates the number of persons working in agriculture by a substantial amount as a large proportion of this workforce is self-employed - about one quarter being hired workers. In 1981 there were nearly 11,200 workers on 7,300 holdings which had increased to about 11,500 workers on nearly 7,400 holdings in 1984.

Table 5. Employment in Agriculture, Forestry and Fishing

	June 1981	June 1984
Whole-time		
Employees	2,000	1,900
Self employed	6,700	6,900
Total Whole-time	8,000	8,800
Part-time		
Employees	900	900
Self employed	1,600	1,900
Total Part-time	2,500	2,800
Total employees	2,900	2,800
Total self employed	8,300	8,800
Total workers	11,100	11,500
Total holdings	7,300	7,400

Employees = hired family and other workers

Self employed = farmers, partners and directors

Excluded = spouses of farmers, partners and directors.

Figures may not add due to rounding

Activity Rates

8F19. The economic activity rates for Mid-Wales are similar to the Welsh rates, males being 1.4 per cent higher, females 1.3 per cent lower. They are, nevertheless, both lower than the GB rates, males by 1.5 per cent and females by almost 7 per cent.

Unemployment

8F20. In unemployment terms, this area has fared less badly than some other parts of Wales and the UK despite a deterioration in its position between 1983 and 1985. None of the travel-to-work areas within Mid-Wales have unemployment rates over 20 per cent although Machynlleth is fast approaching a male rate of that magnitude. Newtown was the only area to show any fall in unemployment levels over the period, while the rates increased by about 2 per cent in all other areas.

Table 6. Unemployment trends

Travel-to-work areas	Total number	1983*		Total number	1985	
		Total %	Male %		Total %	Male %
JUNE						
Aberystwyth	1,047	9.2	10.8	1,318	11.5	13.6
Brecon	590	7.8	10.1	705	9.2	11.8
Dolgellau and Barmouth	455	10.5	12.7	568	13.0	15.8
Llandrindod Wells	855	11.8	12.6	991	13.5	15.0
Machynlleth	404	13.4	17.6	472	15.8	19.8
Newtown	1,058	12.6	16.3	1,037	12.5	14.8
Welshpool	691	10.6	11.6	830	12.6	13.4
DECEMBER						
Abersytwyth	1,132	9.9	11.6	1,406	12.2	14.8
Brecon	684	9.1	11.3	870	11.4	14.6
Dolgellau and Barmouth	607	14.0	15.4	736	16.9	19.3
Llandrindod Wells	931	12.8	13.3	1,124	15.3	16.3
Machynlleth	505	16.8	19.5	648	21.7	25.1
Newtown	1,020	12.2	15.5	1,053	12.7	14.9
Welshpool	779	12.0	13.0	945	14.3	15.6

* Figures affected by statistical base change due to 1983 Budget measures.

8F21. The long term unemployed, those out-of-work for a year or more, showed a very sharp increase of almost 45 per cent over the year to June 1985, the figure now being over 2,100.

8F22. Seasonal unemployment in Mid-Wales, although giving generally a 1-2 per cent worse rate in December than in June, tends to be particularly bad in the Machynlleth and Dolgellau and Barmouth TTWA areas. The former area, had a male rate in December 1985 which was 5.3 per cent worse than in June 1985. The position as regards seasonal unemployment also seems to

have deteriorated since 1983, with the differences between June and December rates widening.

ii. Infrastructure

8F23. The direct measures which have been undertaken and are planned to tackle the basic economic and demographic problems of the Mid Wales Aided Area will not be fully realised without complementary efforts to upgrade communications, water and sewerage, fuel and power and other services which directly support manufacturing, agricultural ancillary industries and the service sector. The main problems are outlined below.

Communications

8F24. The pattern of communications has been dictated by the main river valleys which dissect the uplands and links are therefore sometimes circuitous. There are no motorways in the area. It is distant from the M4 in South Wales and there is need to improve road links with the motorway. The trunk road network provides links between North and South Wales on the A487, A470 and A483. The most important east-west routes in the area are the A458 trunk road from Shrewsbury to the coastal areas; the A44 linking Aberystwyth with the rest of Mid Wales and to England and the A40 which connects the English South Midlands area to West Wales. Whilst improvements have been made to these routes in recent years the physical features of the area continue to restrict its accessibility.

8F25. Furthermore there are problems of providing an adequate road network for an area where the centres of population are small and where there are a large number of widely scattered hamlets.

8F26. Railways provide an important means of public transport in this predominantly rural area. The main lines are the Cambrian Coast Line, the Central Wales Line and the Mid Wales Line (described in paragraph 8F5). In the summer months these lines are also used extensively by tourists.

8F27. A series of proposed improvements (electronic signalling, level crossing improvements, new rolling stock) recently announced by British Rail will modernise the railway. These will lead to improved services, reduced running costs and thereby help maintain this important network.

8F28. Public road passenger transport is provided largely by Crosville Motor Services Ltd (a subsidiary of the National Bus Company). The Company provides a fairly extensive network of services throughout the area but in some particularly isolated parts services are infrequent. Small private operators provide some local services and additional services are provided by unconventional forms of public transport such as the post bus scheme operated in conjunction with the Post Office and social car schemes supported by volunteer effort. The rural and isolated nature of the area means that the service network has to be supported financially by the County Councils.

Other Services

8F29. Mid Wales is a major catchment area supplying water to industrial England. It includes a number of large reservoirs providing adequate capacity within the sub-region. The largest complex of reservoirs in Wales, the scenically beautiful Elan Valley system, also serves as a tourist attraction. The water problems faced by Mid Wales are those of distribution rather than resources, as most distribution systems are designed to serve small, scattered rural communities. Some localities are still reliant on small or inadequately treated sources of water and high water supply costs have inhibited proposed industrial developments in some rural areas. Similar problems face the sewerage and sewage disposal systems notably in the growth area of central Powys and in some coastal areas where works are in hand to improve these facilities and to eliminate the substantial increase in pressure on the services due to the influx of tourists.

8F30. Welsh waste disposal activities are on a small scale and individual district councils are finding increasingly that new sites are difficult to find and expensive to develop to basic standards of pollution control and amenity protection. Local Authority waste disposal sites could, in certain circumstances, with the agreement of the Water Authorities, be adapted to receive a wide range of wastes, including industrial wastes. It is now generally recognised that such facilities are an essential support for industry.

8F31. The sparsity of population and terrain also means that the provision and maintenance of other utility services to support and encourage industrial development within the area are difficult and costly. Specific schemes to reinforce the electricity supplies to industrial estates in Newtown and Welshpool are all but complete and new developments in the sub-region will in all probability require the system to be reinforced further. In the meantime ongoing renewal and refurbishment work and improvements to communication and telecontrol systems will be undertaken to ensure security of supply. Major expenditure is to be incurred in securing gas supplies to Aberystwyth and providing natural gas to communities remote from the natural gas system. Consideration is also being given to a reinforcement project for Bala/Corwen (the latter is outside the area) and similar works are being considered for Llanfyllin. A planned reinforcement scheme at Presteigne is dependent upon works in the neighbouring West Midlands Gas Region.

iii. Social

8F32. The sparsity of population in Mid Wales creates problems in the provision of social services - education, health and geriatric care - and, if the area's economy is to be developed and industry attracted, the social infrastructure must be improved. In some cases the numbers at individual primary schools have fallen to single figures, and the catchment areas of secondary schools are extensive, in several cases exceeding 400 sq km and involving long distance travel. These factors and increased costs (expenditure by Powys Local Education Authority on school transport is more than double the Welsh average) constrain the curricula, limit specialist staff and result in deficiencies in special educational provision. Almost one-tenth of households in the area lacked an inside toilet or bathroom in 1981. There is no District General Hospital within the area and capital expenditure to improve the range of services available in the community hospitals is required. The increasing proportion of very elderly people in the area which has a supply of outdated residential provision has significant implications for investment in order to supply more suitable modern integrated community based facilities. The low income levels and sparsity mitigate against the generation of indigenous social and cultural facilities. Support for such facilities may be a further factor which is instrumental in correcting a tendency to depopulation, particularly of the young, and thus necessary to the development of a stable social fabric within which industry can develop.

C. PROSPECTS

8F33. The area has considerable potential for many kinds of development. Land is an abundant resource. There is potential, either latent or readily developable, for the expansion of forestry and those industries ancillary to agriculture, manufacturing, commercial and administrative services, and tourism. There is scope for the development of leisure activities throughout the area, by using its natural and man-made features.

8F34. Considerable efforts are needed to develop and diversify the economy in order to maintain the working population and reduce unemployment in those areas worst affected, and to improve the area's population structure and raise its income levels. This can only be achieved by the creation of new jobs in a number of localities. Forestry will provide some new employment and there are opportunities for the development of downstream industries related to agriculture, and to a lesser degree forestry (for example there is considerable potential for adding value to foodstuffs and timber products produced locally before such goods are exported from the area) but in the main prospects for success depend on the development of the manufacturing sector and the further growth of the tourist industry.

8F35. New employment needs to be created not just for the resident population but also to continue to attract others of working age into the area. Long term historical depopulation trends, which have not been offset by the growth of population in the immediate past, have, as explained above (para 8F6) left a relatively small base of working age population. It is anticipated that by 1991 the working age population of the County of Powys (projections are not available for the whole of the Aided Area) will have increased by almost 2,000. The task of providing jobs to counter selective outmigration of the young is compounded by the need to provide jobs to cope with the short term increase projected in the number of working age.

SECTION 2 - DEVELOPMENT OBJECTIVES

8F36. The assessment of the economy presents a profile area with considerable potential as yet underdeveloped but still significantly dependent on the primary sector and tourism with only a small and narrowly

based manufacturing sector located at certain key growth areas. Extreme population sparsity adds to the problems of the area. The overriding objective is to create a diverse and stable industrial structure, to encourage the growth of employment opportunities and stabilise and consolidate the population.

A. **ECONOMIC**

i. to increase the number and range of employment opportunities, in manufacturing, other industries, and the service and self-employment sectors by encouraging the growth of indigenous industries and the attraction of new projects;

ii. to provide serviced sites and factory space for new and expanding businesses in selected areas and smaller units and workshops in other rural centres primarily through new building but also through the conversion of existing, sometimes redundant premises;

iii. to encourage the formation and expansion of small firms in recognised growth and commercial centres and in rural areas;

iv. to stimulate increased innovative activity and the acceptance and use of new technology;

v. to encourage entrepreneurial talent by teaching business skills and also to improve the skills and facility to adapt to change of the working population through training schemes;

vi. to develop the potential offered by the natural resources of the area - particularly in agriculture, forestry and fishing and with a particular view to increasing employment in these, and dependent industries; and

vii. to encourage the expansion of the service sector, notably tourism, through the provision of additional accommodation and facilities and to integrate tourism with other economic and recreational activities, whilst recognising the need to conserve the natural environment.

B. DIRECT INFRASTRUCTURE

- i. to maintain and improve the road communications within the area, increase its accessibility (and improve access to industrial estates) to attract industry and to exploit tourism potential;
- ii. to safeguard and develop transport facilities, including rail and air in order to protect and stimulate employment generated by the primary industries, manufacturing and the service sector; and
- iii. to maintain and upgrade all aspects of the direct infrastructure support for economic development including water, sewerage, waste disposal, drainage, flood protection, telecommunications and other public utilities.

C. SOCIAL INFRASTRUCTURE

- i. to improve the social infrastructure, including the range and quality of housing, to encourage inward investment and population stability or growth;
- ii. to enhance and preserve recreational and cultural facilities for the benefit of the indigenous workforce and to stimulate inward investment and tourism.

SECTION 3 DEVELOPMENT MEASURES

8F37. The measures outlined below illustrate the continuing work being undertaken in a bid to meet the objectives for the economic development of the Aided Area.

8F38. Assistance from the European community has played a valuable role to date in the development of Mid Wales' economy, including support via the ERDF to a number of schemes, details of which are set out in Appendix 1. Not included in the list, but also of direct relevance are elements of large infrastructure investments such as the reinforcement of gas supplies to North West Wales and the Gwynedd rural road programme which have benefited both this area and its near neighbours. The area has also derived considerable benefit from the ESF in particular in relation to the

Small Firms Wages Subsidy scheme operated jointly by the local authorities. As might be expected from the area's predominantly rural character FEOGA aid has also been extremely important to the area (see paragraph 8F53). Dyfed, Gwynedd and Powys County Councils are also jointly examining the scope for the three counties to qualify as an "Integrated Operations Area" and have received ERDF assistance towards a feasibility study.

A ECONOMIC

Financial Assistance

8F39. Financial assistance to industry is of great importance to the Aided Area because of its lack of an indigenous industrial tradition and remoteness - partly perceptual - from traditional investment and financial sources. It is needed to encourage the development and growth of small businesses and the service sector, to facilitate the expansion of existing industry and the attraction of mobile industrial projects.

8F40. Central Government direct financial assistance to industry in the Aided Area was discontinued in August 1982 but the Government recognised the necessity for the continuation of substantial direct assistance to the Area. Consequently a grant scheme run by the Development Board for Rural Wales (under an agency agreement with the Welsh Development Agency) - the Mid Wales Development Grant scheme - was instituted in 1982 upon the area's loss of Assisted Area status. Available resources for grants are about £500,000 pa. The grant scheme was formally launched in November 1982 and at 1 January 1986 £1.5 million of grant had been approved for payment by the Development Board to 82 projects mainly indigenous businesses to assist with the creation or safeguarding of almost 1,650 jobs. Additionally the Board provides assistance for economic - mainly infrastructure - development by means of a grant scheme for which local authorities and statutory undertakers (eg. railways, gas and electricity boards) are eligible. In 1984/85, grants of almost £231,000 were made in the Aided Area; in 1985/86 it is estimated that grants totalling over £500,000 will be paid. The DBRW is also able to offer grant assistance in the Aided Area for the conversion of redundant buildings for use by light industry, craft industry or some service industries. The scheme was launched in January 1983 and at 1 January 1986 grants totalling around £40,000 had been paid out.

8F41. In addition, the Welsh Development agency (WDA) provide loans and equity capital for both new and existing businesses. At 1 January 1986 the Agency's portfolio contained approved investments totalling some £1.3 million in 23 firms to provide 250 jobs in the aided area. The Agency also operates a concessionary loan scheme in rural areas from which in the aided area 10 firms have benefited - a total investment of some £100,000. These schemes run in parallel with financial assistance provided by the local authorities who can offer loans and guarantees to new and expanding firms, for example, Powys County Council's currently operational Economic Development Fund. Brecknock Borough Council plan to institute a similar scheme within the programme period.

Promotion

8F42. The DBRW offers advice to firms and itself actively campaigns to attract mobile industrial projects. Special business exhibitions and promotions are held with the joint aims of increasing markets for local products and promoting Mid Wales as a location for business and industry.

Industrial Sites/Factory Building

8F43. The DBRW has undertaken, and continues with, an extensive programme of advance factory building in the Aided Area. The programme has been aided by the ERDF. Throughout its area, the Board concentrates its capital developments on priority areas, aiming to provide jobs, primarily in manufacturing, in those locations best able to sustain industrial and population growth. First in priority is Newtown. At Newtown 134 units totalling 823,200 sq ft have been provided, employing 1,816 people. The Board's other priorities for development are its Growth Areas, Key Towns and Special Towns. Seventeen towns are so designated within the area, including Aberystwyth, Llandrindod Wells, Rhayader and Builth Wells, where the Board plans to increase its priority efforts, and where 362 units totalling some 1.8 million sq ft have been provided employing around 4,000 people. Plans for further developments at Newtown are under consideration and the Board's approved construction programme for its area outside Newtown for 1986/87 includes 6 units totalling 40,000sq ft which will provide a further 120 job opportunities. In addition the Board currently has a further 17 units totalling 162,000 sq ft under construction in the Aided Area which, when completed will provide almost 500 job opportunities.

8F44. The DBRW also undertakes a programme of providing serviced industrial estates in connection with its advance factory building programme. To date 26 serviced industrial estates have been provided at 19 locations, totalling 215.6 acres and the Board holds a land bank of 81.1 acres to prepare for future industrial development. It is planned that a further 87 acres will be bought and developed over the programme period.

8F45. The local authorities are active, also, in the development of sites to encourage industrial expansion. Dyfed County Council has provided workshop units at the Glan yr Afon site in Aberystwyth which have all been occupied and expansion of the site is planned over the programme period. Montgomery District Council has completed two village workshop schemes (at Llanbrynmair and Tregynon and Caersws) with a fourth planned for 1986/87 at Llangynog. Brecknock Borough Council also has a programme for providing workshops in smaller settlements.

Small Firms and Business Development

8F46. The DBRW offers advice and assistance to firms on a wide range of subjects - financial, legal, technical etc. Contact is sustained with firms on an individual basis, and courses, clinics and seminars are held, some of which have benefitted from ESF grants. Contacts have built up steadily over the years, from 1,300 in 1978/79 to an estimated 2,000 in 1985/86. This service is supplemented by the Welsh Development Agency's Counselling services, the Small Firms Service, which is administered by the WDA in association with the Department of Employment; and specialist advice, local advice groups and local authority assistance to the development of co-operative ventures.

8F47. Local authorities in the area operate a Small Firms Wage Subsidy Scheme with ESF assistance. From 1 January 1986, firms in the County of Powys ceased to be eligible for subsidy as Powys no longer qualifies as a Priority area for ESF assistance. The County Council feel that this will make it more difficult to increase employment in the Aided Area. In the last three years the scheme has directly assisted the creation of over 200 jobs in the county. In addition some authorities provide rate relief to assist new industries. The EIB announced the establishment of a new loan agency agreement for schemes in non-assisted areas in January 1983.

8F48. The DBRW undertakes a variety of activities to assist and expand the Aided Area's craft industry and where possible relate it to tourism with further spin-off jobs and income for example by the provision of 750/1,000 sq ft starter factories/workshops linked to the needs of craftsmen. At Corris, for example, the Board has completed a craft centre, comprising 6 x 1,000 sq ft specially designed craft workshops and a shop/restaurant facility. In addition to the direct jobs provided in the units, a high level of tourist visitors to the complex is reported. Further small production units incorporating small retail outlets geared to the tourist market have been provided at Rhayader, Bala and Tywyn.

Stimulating Innovative Activity/Use of 'New' Technology

8F49. The importance which strong links between the education sector and industry can play in the stimulation of innovation and the development of the economy have been recognised and initiatives to provide closer links between industry and the sub-region's schools, colleges and University continue to be developed. The DBRW has constructed a Science Park at Aberystwyth in collaboration with the University. The project was designed to attract new technology and to generate such initiative from within, encouraging the provision of employment for graduates and those with technological skills. To date the Board has completed 5 units totalling 8,000 sq ft of which 3 have already been let. Currently another 8 units totalling 4,000 sq ft are under construction and there are plans to build a further 2 units totalling 10,000 sq ft in 1986/87.

8F50. At Newtown the Board has also constructed a Science Park. This comprises 10 units totalling 22,250 sq ft. The units, built to a high specification, have been designed to attract companies engaged in high technology and Research and Development.

8F51. Dyfed County Council commissioned, and in 1984 received, a report from the Department of Agricultural Economics at Aberystwyth University which examined agrifood employment opportunities in the County. Developments identified by the report will commence implementation within the Programme period. The aim will be to widen the existing agricultural base to include food processing, the development of new products, commercial freezer capacity and possibly the establishment of a Welsh Food Centre.

Training

8F52. Training of the workforce by industry is supplemented by central and local government. The training and vocational education programmes provided by the Manpower Services Commission are now more flexible and more responsive to the changing needs of industry. There has been a move away from long duration, Skillcentre based training for unemployed people. The MSC is acting more as a catalyst providing direct pump priming support to industry, including small businesses, both on employer premises and at local institutes of further and higher education. Local authorities and the DBRW complement such training by acting as YTS managing agents and as sponsors of Community Programme schemes. ESF aid has been obtained for tourism training schemes in catering and hotel management in colleges at Aberystwyth. Dyfed County Council plan to open an Information Technology Centre in the Aided Area. Powys Local Education Authority started a scheme in September 1984 under the MSC's Technical and Vocational Education Initiative with the aim of improving the suitability of training for 14 to 18 year olds.

Natural Resources

8F53. The Shotton Paper Mill, which was officially opened in November 1985, will provide an important outlet for the Forestry Industry in Mid Wales and elsewhere. It has been estimated that when the mill eventually achieves full production capacity a further 850 jobs in supply and ancillary activities will have been created. The mill will use substantial amounts of otherwise unusable small roundwood, providing employment opportunities over a wide area of Wales covering the home forests. There will, therefore, be multiple benefits.

8F54. Considerable investment in agriculture is being undertaken with the advantage of assistance under both the EC and UK Capital Investment Grant Schemes. The area benefits considerably from payments made under the various elements of the Common Agricultural Policy. Assistance under the Less Favoured Area directive paid to Powys farmers amounted to £12.4 million in 1984 of which FEOGA reimburses 25 per cent of allowable payments. A project at Aberystwyth Harbour to improve facilities for the fishing industry involving widening and strengthening of the Fish Quay and dredging of the access channel is now underway and due for completion in

July 1986. The project which will cost £400,000 is being funded jointly by Ceredigion District Council, DBRW and Welsh Office Agriculture Department and will facilitate better marketing arrangements and enable a larger fishing fleet to use the harbour. In addition the DBRW and Ceredigion District Council are jointly funding another project to improve another part of the harbour known as the Gap. Improvements include the installation of mooring and the building of a launching ramp, the estimated cost of £250,000 being jointly borne by the DBRW and the Council. DBRW are also promoting a financial assistance package (including Sea Fish Industry Authority and EEC grant) for fishing vessel purchase and modernisation and it is hoped that this will lead to improved employment opportunities.

Tourism and Service Sector

8F55. Mid Wales' potential for rural and water-based tourism activities is being developed by the private sector, local authorities and the Wales Tourist Board (WTB). Farm tourism's development is of continuing importance in supplementing the income of marginal farms and assisting the check on rural depopulation. Major public authority schemes aimed at the further development of water-based tourism are planned to commence within the Programme period. Included are the Montgomery Canal restoration project, which is an ambitious scheme aimed at creating a major addition to the tourism facilities in the North of the Aided Area and which will provide employment opportunities within the settlements and rural areas through which the canal runs; inland water-based projects are also taking place at Llyn Clywedog and are planned for the Elan Valley. Coastal water-based projects are also planned principally a major development of a marina and related facilities at Aberystwyth Harbour and other developments at smaller resorts and coastal towns. Improvements are also planned for the programme period for tourist attractions, accommodation and facilities: included are all-weather facilities at Barmouth, Brecon, Builth Wells, Crickhowell, Hay, Llandrindod Wells, Llanidloes and Machynlleth; visitor information and interpretative facilities at a variety of locations; improvements of facilities at caravan parks, hotels, hostels and activity centres; the expansion of farm tourism accommodation; and attractions based on the area's cultural and industrial history and scenic beauty. In addition to the WTB and the local authorities, the DBRW has major tourism development projects planned for the programme period, for example,

participation in the Aberystwyth Marina scheme - many of which will be undertaken in conjunction with other bodies and the private sector - with a total cost which may exceed £20 million.

8F56. Environmental and infrastructure works to support tourism development in the Aided Area, and to cater for increased demand on services from additional units are also required. Land reclamation and building clearance is to be undertaken at Severnside and Llanidloes works - including the provision of tourist facilities - are planned at Dylife lead mines. Planned improvements to the water supply, to meet the needs of tourism and industry, include works at Eithyn Fynydd, Brecon, Llandrindod Wells, Rhayader and Cradoc. DBRW social and economic development grants have, and will continue to, supported tourism infrastructure projects.

Other Services

8F57. The local authorities and DBRW recognise the potential offered in many locations - particularly designated growth centres and main commercial centres - for economic growth through the development of other services. The DBRW continues its programme of commercial development, in conjunction with other bodies and the private sector, in order to exploit alternative growth opportunities. At Newtown the Board has provided some 90,200 sq ft of office/shop space has been provided and the Board has plans to develop within the programme period further office and commercial developments at Newtown, Dolgellau, Welshpool; a major commercial project at Aberystwyth Station to provide a large store, shops, warehousing, new station and car parking; the provision of an office complex at Aberystwyth; and the development of an office/shopping complex at Llandrindod Wells.

8F58. The Board, in conjunction with the local authorities, continues its work to improve telecommunication links within the area and to the area, with the objective of catering for the communication needs of local industry, increasing the area's attractiveness to industry and laying the ground for establishing new decentralised work patterns. Projects planned for the programme period include the installation of advanced exchange systems at Newtown, where the Board also plans the development of common Business Resource Centre for small businesses; and the provision of other advanced telecommunications schemes in the larger Aided area. The latter will include improved local call access to advanced systems and the extension of radio paging and the cellular radio Network.

B. DIRECT INFRASTRUCTURE

Road Communications

8F59. Major trunk road improvement schemes have been undertaken in the Aided Area in order to eliminate traffic bottlenecks occurring in the summer months, eg the A470/A40 Brecon Southern and Eastern By-pass was completed in 1980 and the A470 Dolgellau By-pass in 1981. The next significant improvement is likely to be the provision of a by-pass for Llanidloes (A470) which is being prepared ready to start construction before December 1987. In the period January 1988 to December 1990 the provisional improvement programme envisages that work will commence on the provision of a by-pass for Welshpool and on the upgrading of the A470 and A44 routes in the vicinity of Llangurig, subject to the completion of engineering, design and statutory procedures and the availability of resources. The post 1990 programme has yet to be finalised but two projects have been identified as worthy of further consideration: the upgrading of the A458 route between Welshpool and the English border, which forms an important link between Mid Wales and the English Midlands, and the provision of a by-pass for Builth Wells on the A470 main north-south route in Wales.

8F60. In addition to these major schemes a large number of smaller projects have been undertaken and are in preparation. Whilst these are not of as spectacular a nature, they nevertheless make an important contribution to the efficiency of the road network.

8F61. The sheer size of the area and its scattered local road network, coupled with its low population has meant that available resources are severely stretched both in terms of undertaking improvements and maintaining the considerable lengths of existing county roads. Some limited improvements have been carried out but there remain a number of stretches where work needs to be done. Weight restrictions have had to be imposed in order to protect bridges which require attention and this results in inconvenience to some road users. Another priority is the need for further improvements to industrial estates and for generally improved access for industrial and tourism traffic.

Other communications

8F62. Dispersed population and high railway maintenance costs have led to a history of the area's railway lines having been uneconomic, with operating costs far in excess in revenue. Nevertheless the lines have an essential part to play in communications within and into the area. British Rail, in conjunction with the local authorities and the DBRW, has announced a substantial investment programme (with a total cost of over £4 million) in order to increase operating efficiency and to provide improved services. The investment programme for the programme period includes the introduction of electronic train control, with associated level crossing and track modernisation, on the Central Wales Line. In addition to benefits to local communities this scheme will allow the operation of additional excursion trains, attracting more tourists to the area. Major improvements to the Mid Wales and Cambrian Coast Lines between Shrewsbury and Aberystwyth/Pwllheli will involve the introduction of radio signalling with associated level crossing and track modernisation. The project will improve traffic flow, reducing journey times and the modernised line will improve travel prospects for the local population and, by allowing far more through regular trains and excursions improve the area's attractiveness to tourists. Both the Central Wales and Cambrian Line schemes will be complemented by the introduction of new rolling stock. In addition, British Rail plan a number of station modernisation schemes at Machynlleth, Aberystwyth, Welshpool and Devil's Bridge (the latter involving provision of a Tourist Centre).

8F63. The nature of bus services in the area may change in the future as a result of greater competition in the bus industry following the introduction of the Transport Act 1985. It is not expected, however, that these changes will give rise to any major new investment in infrastructure.

8F64. Following the comprehensive research study into rail and air transport in Mid Wales, which emphasised inter-regional aspects, the Development Board for Rural Wales is planning a test marketing study for helicopter services in Mid Wales and has plans to develop an aerodrome, in conjunction with the private sector, at Caersws near Newtown.

Water and Sewerage

8F65. Works with a total cost of almost £12 million are planned for the programme period to improve water supply, sewage disposal and sewerage and land drainage. Supply improvements will cater for increased industrial and tourist demand at designated growth centres - for example Rhayader and Llandrindod Wells; similarly sewage disposal arrangements, affected by tourist traffic, are to be improved at Llandrindod Wells, Aberystwyth and Barmouth. At a number of locations, water treatment to EEC standard is to be introduced - for example Bontddu, Dinas Mawddwy, Fairbourne, Tywyn and Aberdyfi and Upper Dee. Local authorities are also active in the provision of localised services - for example Montgomery District Council plans to complete "first-time" sewerage schemes at a number of villages in the programme period.

Other Services

8F66. Further development of support services is also essential in order to facilitate industrial growth and the further development of tourism. A number of electrical mains reinforcements are planned to the 11KV system at industrial locations such as Brecon, Llandrindod Wells and Builth Wells and at other population centres, and a major scheme to strengthen the 33 KV overhead line system, strengthening supplies to industrial customers, is ongoing. Additionally major expenditure is to be incurred in securing gas supplies to Aberystwyth and in providing natural gas to communities remote from the natural gas system. Other gas reinforcement projects are planned at a number of industrial locations - Bala, Presteigne, Hay-on-Wye and Machynlleth - at a total estimated cost of over £5.7 million. Planned telecommunications improvements are described in paragraph 8F57 above.

C. SOCIAL INFRASTRUCTURE

8F67. In addition to programmes directly aimed at assisting the development of the Mid Wales economy, the development of social and cultural infrastructure is of great importance to the area in order to assist in the attraction and development of industry, to encourage population stability and to assist the maintenance and expansion of rural communities. Of significance are the housing investment programmes

undertaken by the DBRW: in Newtown the Board has provided some 1,400 dwellings. Estimated expenditure on housing is £663,000 in 1985/86. Outside Newtown the local authorities, housing associations and DBRW are engaged in providing dwellings (new build and refurbishment) for key and incoming workers to complement the DBRW's factory construction programmes.

8F68. Other aspects of the social infrastructure must be maintained if industrialists and workers are to be attracted to the area and the population stabilised. There are plans for significant development of services at Bronllys General Hospital, Aberystwyth, which presently provide acute facilities for the northern area of Ceredigion as well as south Gwynedd and west Powys. The new district general hospital at Bangor, opened in mid 1984, provides services for the whole of Gwynedd, including the district of Meirionnydd. Because of its small population, the county of Powys has traditionally relied on neighbouring authorities for the provision of its major acute health services. Powys Health Authority however, is committed to the improvement and expansion of its local services and, to this end, is proceeding with the development of five community hospitals within the district; the Community Hospital at Ystradgynlais is due for completion and occupation within the next few months.

8F69. The provision of leisure, cultural and sporting facilities also improve the social infrastructure and are recognised by the agencies and authorities acting in the area as integral to the further growth of tourism. Projects are supported by the local authorities and the DBRW. The DBRW's social grant scheme also assists schemes of benefit to local communities. Grants totalling £383,000 were estimated in 1985/86 and a similar level of assistance is likely in 1986/87. The Board also sponsors cultural events and functions attractive to tourists as well as residents.

8F70. The indicative list at Appendix 2 tabulates some of the main projects being undertaken in Mid Wales during the Programme period in order to further the objectives outlined in Section 2. Further projects may well be identified in the course of the integrated operations study which is now being undertaken jointly by the Powys, Gwynedd and Dyfed County Councils.

SECTION 4 - IMPLEMENTATION AND COORDINATION OF INVESTMENT

Financial Resources

8F71. The following estimates of capital expenditure in the Profile Area over the programme period are based upon project costs as identified by the local authorities and public bodies which contributed to the compilation of the programme. Practical considerations preclude the preparation of accurate estimates for every project listed in the Appendix and the totals are therefore indicative only.

	1986-87 £m	1987-88 £m	1988-89 £m	1989-90 £m
Factory building, site development and land reclamation	5.7	2.9	2.3	2.2
Tourism	3.3	12.3	26.4	25.0
Roads	1.8	1.1	3.4	4.3
Rail	3.3	1.0	0	0
Air transport	0.3	0.9	0	0.3
Water, sewerage and flood protection	5.0	4.8	1.0	0.6
Telecommunications	0	0.5	0.5	5.0
Electricity	4.0	3.8	3.8	3.7
Gas	1.4	1.4	1.4	1.4

Notes: Tourism - excludes Wales Tourist Board Grant

Roads - estimated expenditure on trunk roads, and on county roads over £5 million. Estimates provided by Welsh Office.

Coordination of Investment

8F72. Each County Council in the Aided area has a Structure Plan, approved by the Secretary of State. These Structure Plans together contain policies and proposals for the Aided area's development up to 1991. In addition, Local Plans, prepared by the District Councils (except in National Parks where they are prepared by the County Councils) are required to be in

general conformity with the Structure Plan for the area they are in. These plans provide a system for the co-ordination of investment. In addition the whole of the Aided area lies within the area of operation of the Development Board for Rural Wales, which was statutorily established in 1977 to promote the economic and social well-being of the people in its area. The DBRW works in close consultation with the local authorities and other statutory and non-statutory bodies in the course of formulating its development programme. The Board, with the support of these bodies, operates a strategy of concentrating effort and expenditure on selected growth centres, including Newtown, Powys, designated as a new town in 1967. The further development of the 17 identified growth areas is crucial to the stabilisation and increase of the area's population - a prerequisite of further economic development. The main priority is the provision of additional employment opportunities and there is a remaining requirement for further investment in serviced industrial estates and advance factories together with supporting services and communications infrastructure.

8F73. An increasingly important priority is the creation of employment opportunities in the commercial and service (including self-employment) sectors, particularly tourism. Again there is need for investment in direct support and communications infrastructure. The Mid-Wales Tourism Council, established in 1970 by the Wales Tourist Board as an advisory body, is funded by the WTB, all the local authorities in the sub-region, and the private sector, and ensures a co-ordinated approach to the development of tourism.

8F74. The County Councils of Powys, Dyfed and Gwynedd have been co-sponsors of a study, funded with assistance from the EC Regional Fund, to examine the scope for integrated action in the area. The study is due to be completed in 1986. In particular, it will advance ideas for the development of Agriculture, Forestry, Fisheries, and related industries and will also examine the prospects for Tourism Development and future Manufacturing Industries. Major problems in communications development are also to be highlighted including the need for more advanced telecommunications systems which are of special relevance to the development of small businesses in rural communities. Proposals for the co-ordination of policies and investment will also be advanced.

ERDF AID TO MID WALES

Indicative projects which have received aid in recent years
(Para 8F37 refers)

Authority	Project	Grant Commitment £	Eligible Cost £
Industrial Development			
Powys County Council	Access to Ffrwdgrech Industrial Estate	215,915	709,000
Roads Communications			
Powys County Council	Presteigne Diversion, Radnor	200,660	668,867
Powys County Council	Kerry Road Diversion, Newtown	287,500	575,000
Powys County Council	A4081 Ddole Road, Llandrindod Wells	165,000	330,165
Powys County Council	A438 Clyro-Pwllldwrgi	174,900	583,000
Gwynedd County Council	A493 Brynchrug Pennal etc improvements	156,190	312,379
Gwynedd County Council	A496 Aberanmffra improvements	433,445	866,891
Tourism Development			
Welsh Water Authority	Elan Valley Visitor Centre	147,550	295,100
Public Utilities			
MANWEB	Reinforcement of electricity supply to Welshpool	368,700	1,229,000
British Telecom	Mid Wales modernisation scheme	932,220	3,107,400
Wales Gas	Mid Wales reinforcement	364,341	1,214,471
Wales Gas	Mid Wales reinforcement Phase 2	580,499	1,934,998

MID WALES AIDED AREA INDICATIVE MAJOR INFRASTRUCTURE DEVELOPMENTS 1986-90
(PARAGRAPH 8F69 REFERS)

Scheme		1986/7	1987/8	1988/9	1989/90
Trunk Roads					
A470	Llanidloes By-Pass	start	-----		
A470	Improvements at Llangurig			start	-----
A483	Welshpool Relief Roads			start	-----
Principal Roads					
A4215	Defynnog-Tylegarw Road Junction, various stages	ongoing	-----		
A4078	Talgarth to Three Cocks Stage III	----	complete		
A489	Kerry Road Diversion Stage II	-----	complete		
A495	Mathrafel Junction	----	complete		
A490	Bends Bwlch-y-Cibau	----	complete		
A489	Lower Brimmon	start	---	complete	
A4067	Cnewr Improvement			start	-----
A489	Cefn Fastre Bends			complete	
A490	Churchstoke - Alport			complete	
A490	Trefanney Junction			complete	
A495	New Bridge, Melford			complete	
A44	Hendre Bends			start	---
A488/7339	Junction Hill Farm, Dolau			start	---
A4212	Frongoch - Tynddol				start
A496	Llanfair Diversion				start
A496	Llanbedr By-Pass				start
A496	Ymwlch Pensarn			start	-----
A496	Dyffryn - Talybont	start	-----		complete
A493	Pont Pant Eidal	-----	complete		
A493	Gogarth, Aberdyfi	start	-----		
Other Roads					
C1010	Penrhyncoch	start	---	complete	
	Unclassified Pen-yr-angor Road, Aberystwyth			start	---
	Mochdre Junction, Newtown			complete	
	Newtown Roads				complete
C24	Camrarch Bridge	----	complete		
B4520	Tair Derwen to Lower Chapel, various stages	ongoing	-----		
B4558	Cross Oak, Pencelli			complete	
B4558	Cwm Crawn, Llangynidr			complete	
C75	Ffordlas Improvement including Llwynbarried Turn			complete	
C78	Improvement from Junction with C75 to Llanigon Church			complete	
C69	Pontuwal Lane, Bronllys			complete	
C160	Ffrwdgrech Bridge			complete	

Scheme		1986/7	1987/8	1988/9	1989/90
Other Roads (cont'd)					
B4560/ C103	Llangorse Footways Stage III	complete			
C44	Back Lane, Criggion	start-----		complete	
B4569	Pont Bryn Llwyn	complete			
B4569	Llangynog By Pass	start---complete			
C203	Pengeulan Bridge	complete			
B4569	Improvement at Pont Afon Garno	complete			
B4398	Coedway, Hand and Diamond	complete			
B4519	Gleinant Bridge	start---complete			
C13	Rhos Common - Bronhaul Bank	complete			
B4355	Dutlas Village	start---complete			
B4418	Junction C203 Bwlch-y-Sarnau Pontydŵr	complete			
B4594	Junction C342 Pencae Newydd, Llanbedr	complete			
B4372	New Radnor, Street Lighting	complete			
B7531	Dolau Cwm Ffrwd Bridge	start---complete			
B4519	Improvement 1 mile South of Garth		complete		
B4558	Junction with C142 Upper Llanaynidr		complete		
C160	Pont Rhyd Goch, near Crickhowell		complete		
B4558	Lower Onneu and approaches		complete		
C50	Trallong to Pentrefelin		complete		
C178	Den Pitch, Glantawe Road, Trecastle		complete		
B4560	Llangorse Bridge		complete		
B4558	Various Improvements		start-----		
B4558	Bends near Troedrhiwdalar		complete		
B4390	Berriew Manafon		complete		
C83	Womaston Bridge		start---complete		
B4350	Pistyll Bends, Boughrood		start---complete		
B4405	Dolgoch, Abergynolwyn	ongoing-----			
B4410	Pont Afon, Gaseg	-----		complete	

Industrial Developments

Aberystwyth Land Reclamation	complete
Village workshops, various locations	ongoing -----
Economic Developments, various locations	start-----complete
Brecknock Livestock Markets, Improvements	start---complete
Hay-on-Wye, Rehabilitation of cheese market	complete
Brecon Decking (Covering) Market Car Park Land Reclamation:	start
Brecknock minor schemes	start----- complete
Dylife	complete
Severnside	complete

Scheme	1986/7	1987/8	1988/9	1989/90
Industrial Developments (contd)				
Factory Starts, Newtown:				
Site Works	ongoing	-----	-----	-----
120,000 sq ft unit	-----	complete	-----	-----
60,000 sq ft advanced factories	start	-----	complete	-----
40,000 sq ft advance factories	-----	start	-----	complete
40,000 sq ft advance factories	-----	-----	start	-----
40,000 sq ft advance factories	-----	-----	-----	start
Newtown, Development of Business Resource Centre	start	-----	complete	-----
Economic Development Programme for Industry and Housing outside Newtown:				
Land Acquisition	ongoing	-----	-----	-----
Engineering Works	ongoing	-----	-----	-----
Factory starts	ongoing	-----	-----	-----
Housing starts	ongoing	-----	-----	-----
Economic Development Projects outside Newtown:				
Mid Wales Generally	ongoing	-----	-----	-----
Provision of New Abattoir, and meat processing facilities Radnor district	ongoing	-----	-----	-----
Industrial Estate and Advance Factory Construction:				
Various locations including Aberystwyth, Rhayader, Llanfyllin, Llandrindod Wells, Welshpool, Dolgellau, Tywyn, Bala, Brecon and Machynlleth	ongoing	-----	-----	-----
Mid Wales Product Centre	-----	-----	start	-----
Creation of a new Mineral Water Bottling Plant	ongoing	-----	-----	-----
Development of "New World" Office Campus in Brecon; feasibility study	start	-----	-----	-----
Nantgwyddon (Rhondda) Waste Disposal Site	-----	-----	-----	complete
Commercial Developments				
Newtown, Acquisition of Land and buildings for commerce	complete	-----	-----	-----
Newtown, Sundry redevelopments schemes	-----	-----	-----	complete
Newtown, Development of new office complex, Possible Development of services sector/retailing Complexes at major tourist centres	start	-----	-----	complete
Aberystwyth Station commercial development	ongoing	-----	-----	-----
Tourism				
Aberystwyth, Car Parking and Roadways	start	-----	-----	complete
Aberystwyth, Sports Centre	-----	-----	-----	complete
Aberystwyth, Town Centre Development	-----	-----	-----	complete
Ceredigion, Refuse Tip	-----	complete	-----	-----
Lake Vyrnwy Tourist Facilities	start	-----	-----	complete
Elan Valley Tourist Facilities	start	-----	-----	complete
Brecknock Tourism Promotion and Tourist Information Centres	start	-----	-----	complete
Machynlleth, Sports Centre	start	-----	-----	complete

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (Cont'd)				
Llanidloes, Sports Centre	-----	complete		
Development of Robert Owen Visitor Centre, Newtown	start	-----		
Great Little Trains in Mid Wales	start	-----		
Aberystwyth Harbour Developments:				
Fish Quay	-----	complete		
Marina and Tourist/Leisure Development	ongoing	-----		
Aberystwyth and Borth Landing stages	start	-----		
Development of Lobster Restocking Hatchery in Aberystwyth			start	-----complete
Possible schemes on:				
Elan Valley Railway; Mountain Bike Centre; Adventure playground, environmental improvements to improve attractiveness of sites to tourist (in conjunction with MSC Schemes)	start	-----		
Devil's Bridge Major upgrading of tourist facilities	start	-----	complete	
Ynyslas Nature Reserve, Development of major Visitor Centre	-----	complete		
Aberystwyth, Development of Alpine slide	-----	complete		
New Quay Harbour Improvements	start	-----	complete	
Ceredigion Development of major Visitor Centre	start	-----	complete	
Bala Development of Interpretive Centre	-----	complete		
Barmouth Development of all weather centre	start	-----	complete	
Infrastructure development for major new hotel at Bala	-----	complete		
Cader Idris, Development of Visitor Centre	ongoing	-----		
Llanelltyd (near Dolgellau), possible development of Goldmine Interpretive Centre	-----	complete		
Tal-y-llyn, Development of Narrow Gauge Railway Visitor Centre	start	-----		
Corris Development of new tourist facility	-----	complete		
Tonfanau Camp (nr Tywyn), Development of Sealife Centre	start	-----	complete	
Fairbourne, Marina Development		start	-----	
Restoration of Montgomery Canal	ongoing	-----		
Elan Valley, Development of new narrow gauge tourist railway	ongoing	-----		
Development of Thomas the Tank Visitor Centre, possibly near Welshpool			start	-----complete
Severn Valley Area Tourism Research study/development of facilities	start	-----		
Research study of the Lake Vyrnwy area	ongoing	-----		
Llandrindod Wells Tourism Research Study/development of facilities	ongoing	-----		
Builth Wells, Possible new developments at Royal Welsh Showground	ongoing	-----		
Bala and district area, research study/development of facilities and attractions	ongoing	-----		
Hay-on-Wye, Development of Visitor and Craft Centre	-----	complete		

Scheme	1986/7	1987/8	1988/9	1989/90
Tourism (cont'd)				
Brecon, New Visitor Centre	ongoing	-----		
Tywyn Area, Leisure Centre		start	---complete	
Tywyn Area, Coast Protection	start	---complete		
Pentrenantglais (Model Village)	start	-----		
Canolfan Tryweryn White Water Centre, Site improvement	start	-----		
Bala Leisure Centre, All weather facilities				start
Barmouth:				
Harbour Sheds, renovation	complete			
Model village improvements			start	---complete
Leisure Centre, infrastructure works			start	-----
Floating Jetty		start	---complete	
Victorian Theme Centre				start
Dolgellau, sports and leisure facilities			start	---complete
Llandrindod Lake, footpath lighting	complete			
Brecknock, Sporting/Leisure Facilities	start	-----		complete
Telecommunications				
Installation of Star Services Unit at Newtown			complete	
Provisions of Advanced telecommunications schemes in Mid Wales	ongoing	-----		
Rail and Other Transport Facilities				
Station modernisation schemes on				
Cambrian Lines				
Machynlleth		complete		
Aberystwyth		complete		
Welshpool	complete			
Devil's Bridge (Tourist Centre)	start	-----	complete	
Central Wales Line, Introduction of Electronic Train Control, level crossing and track modernisation		-----	complete	
Cambrian Lines, Shrewsbury/Aberystwyth/ Pwllheli, Introduction of radio signalling, level crossing and track modernisation		-----	complete	
Test Marketing Study for Helicopter Services in Mid Wales	---	complete		
Development of Mid Wales aerodrome at Caersws, near Newtown	ongoing	-----		
Water and Sewerage				
Eithyn Fynydd Water Treatment Works	-----		complete	
Bontddu New Source	---	complete		
Dinas Mawddwy Improvement	-----	complete		
Fairbourne Supply Improvements	-----	complete		
Tywyn and Aberdyfi New Source	-----	complete		
Upper Dee Water Supply Improvements	---	complete		
Barmouth Sea Outfall	-----	complete		
Barmouth Sea Outfall, Headworks	---	start	---complete	
Brecon, Water Supply	---	start	---complete	

Scheme	1986/7	1987/8	1988/9	1989/90
Water and Sewerage (cont'd)				
Llandrindod Wells, Water Supply	ongoing	-----		
Rhayader, Water Supply	-----	complete		
Llandrindod Wells Pumping Station, modifications	-----	complete		
Cradoc Sewage Treatment Works Phase I and Phase II	-----	complete		
Llandrindod Wells North, Sewer Improvements	-----	complete		
Llandrindod Wells Central, Sewer Improvements	-----	-----	complete	
Twrch Water Treatment Works Improvements		complete		
Cray Treatment Plant, Nant-y-Wydd	start	-----	complete	
Bontgoch Water Treatment Works, Refurbish	start	-----	complete	
Aberystwyth Sewer, Tan-y-Cae	start	-----	complete	
Blaenpwyf Chancery Rhydfelin, Requisition	complete			
Montgomery:				
Kerry Water Supplies				complete
Llandinam Source Uprating			complete	
North West Montgomery Supplies	start	-----	complete	
North Montgomery Supplies				complete
Newtown Water Reclamation Works modifications	-----	complete		
Trewern & Middleton Water Reclamation Works	start	-----	complete	
Four Crosses Sewerage Requisition	-----	complete		
Llyd Clywedog Rolling Programme	-----	-----	complete	
Lake Vyrnwy Rolling Programme				start
Electricity				
Improvement's to Mid-Wales' communication systems	ongoing	-----		
11 KV System reinforcements:				
Crickhowell/Llangynidir		start	-----	complete
Brecon/Sennybridge Stage 2	start	-----	complete	
Penybont/Kington		start	-----	complete
Llandrindod/Llanyr	start	-----	complete	
Builth Town				start
Telecontrol to improve security of supplies	-----	complete		
Improvements to North Wales' communications system	start	-----		
Improvement in Protection and security of North Wales' network	ongoing	-----		
Renewal and refurbishment of 33KV overhead line in North Wales	ongoing	-----		
Gas				
Bala, gas supply reinforcement	start	-----	complete	
Presteigne, gas supply reinforcement		start	-----	complete
Hay-on-Wye, gas supply reinforcement				start
Waunfawr to Machynlleth, gas supply reinforcement	-----	-----	-----	complete

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