

# RURAL DEVELOPMENT PLAN FOR WALES 2007 – 2013

## AXES 3 AND 4 SUBMISSION for CEREDIGION COUNTY

CEREDIGION ECONOMIC REGENERATION PARTNERSHIP

LOCAL DEVELOPMENT STRATEGY AND APPENDICES

MARCH 2007

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## **Local Development Strategy 2007-2013**

This strategy seeks to address the County's wide ranging rural economy and identify Ceredigion's needs and priorities for economic regeneration within a range of domestic and European funded programmes.

These needs and priorities will be met in a number of ways, some large and some small. Some will be individual projects, while others will be best tackled through 'key funds'. Others will join up with similar activities across Wales' regions into large nationally significant projects being delivered in a number of locations.

Innovative and pilot rural development projects, indigenous to the County will be undertaken using a bottom-up approach. This will be widely-based and maximise grass roots community engagement and may involve the rolling out of products and services which incorporate the distinctiveness of the area or new methods resulting in better use of the indigenous potential of the County or bringing together previously separate actors to interact and develop solutions.

The approach will be one in which the parts can only be understood in the context of their contribution to the whole and that the whole must be established first

The Partnership will prioritise actions and support projects and activity that demonstrate a significant contribution to the targets and outcomes envisaged from this Strategy. In addition, prioritised local actions will focus, where appropriate, on fulfilling regional and national strategies.

The Strategy is intended to be flexible and will be reviewed regularly. It is to be supported by an action plan and business plan to manage its implementation over the next three years. These will be reviewed and revised annually. In bringing together economic regeneration needs and priorities for a range of domestic funded programmes, it seeks to reduce duplication, promote clarity in delivery and achievement of outcomes.

It seeks to do this within a substantial policy framework set by Wales A Vibrant Economy, the Convergence Programme for West Wales and the Valleys, the Rural Development Plan, the Territorial Cooperation Programme and guidance provided to take forward the Lisbon Agenda, diversity and other cross-cutting requirements and most recently the Commission's paper 'Employment in rural areas: closing the jobs gap'.

The Partnership wishes this Strategy to be endorsed by the Central Wales Spatial Plan Group and be available widely to inform discussion and decisions that affect the economy of Ceredigion.

## **CHARACTERISTICS OF THE AREA**

Ceredigion is a peripheral rural county on the coast of Central Wales. It is part of the West Wales and the Valleys region, recognised as among the areas lagging behind other regions of the European Union and having Article 87 3 (a) status for the 2007 – 2013 period. The area has access to the West Wales and the Valleys Convergence Programmes as well as other European funded programmes, for example, the Ireland – Wales Territorial Cooperation Programme 2007 – 2013.

All wards in Ceredigion County are eligible for support from the Rural Development Plan for Wales 2007 – 2013 and are classified as 'Rural Wards'.

The County extends to 1783 square kilometres and has a population of approximately 78,300. Aberystwyth is the largest town and other important settlements are Aberaeron, Cardigan, Lampeter, Llandysul and Tregaron. Much of the east of the County is sparsely populated uplands.

The County's economic performance remains extremely weak. There are few new job opportunities across the County and most are presently in Aberystwyth. The contraction of the rural economy has been further exacerbated by the recent closures and withdrawals from the area by Dairygold and Lactalis (Aeron Valley Cheese).

This weakness is reflected in the research published by the WELMERC project (University of Wales Swansea, Welsh Economy Labour Market Evaluation and Research Centre, Autumn 2006 Newsletter). This shows that among all Welsh counties only the most rural, Powys and Ceredigion showed a decline in incomes in the period 2000 – 2005. Figures for Gross Value Added per Head by NUTS 3 Area (Stats Wales) for the period 1995 – 2003 underline this. The area including Ceredigion (South West Wales) has a GVA per head of £9,659 for 2003 with an annual growth of 2.7% during the period. This compares with Powys' £12,459 and annual growth of 4.0% through that period.

There are substantial opportunities for the development of successful small-scale activities under Axes 3 and 4 of the Rural Development Plan for Wales, and for these opportunities to complement the Wales wide activity supported under Axes 1 and 2. Activities under Axes 3 and 4 will have an important role in complementing larger projects to be taken forward under the Convergence Programmes.

At this wider level, there is considerable potential for the Aberystwyth area to build on its role, recognised in the Wales Spatial Plan, as a centre for all of Central Wales. This role extends beyond to be a centre for all Wales especially in sectors related to the rural economy. The current Wales Spatial Plan study on the economic opportunities arising from the high level and research skills in North West Wales and Central Wales highlights this and reinforces the centre as a 'hub of the knowledge economy'.

Parts of the County suffer substantial deprivation. Welsh Assembly Government, (Social Justice in Wales 2006) ranks Ceredigion as the 6<sup>th</sup> worst County in Wales with areas having serious housing problems and difficulties of access to services. There are two Communities First Partnerships in the County.

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## **ANALYSIS**

Substantial statistical evidence has been amassed and extracts are attached as appendices to this Strategy. Issues have been explored and reviewed regularly by the Partnership in open forum. Originally this took place in March 2000 and most recently on 13<sup>th</sup> October 2006 (notes attached in Appendices). These forums have ensured that the Partnership's view of the strengths, weaknesses, opportunities and threats is current and widely accepted:

### **Strengths**

- High quality environment
- Strong social capital
- High potential quality of life
- Diversity within manufacturing sector and growing earth, marine, environmental and land sciences knowledge based sector
- Strong tourism product
- Loyal and flexible workforce
- Substantial higher education / research sector

### **Weaknesses**

- Peripheral to main economic centres
- ICT & Transport infrastructure often inadequate
- Labour and skills shortages
- Low productivity and income
- Lack of community capacity
- Image and perception
- Higher cost of service provision
- Declining sectors in economy
- Low population density
- Water supply inefficiency

### **Opportunities**

- ICT and facilitation of a substantially knowledge-based economy
- Expanding business sectors compatible with rural economy including tourism and renewables.
- Supporting 'Strategic hubs' and significant centres
- Demand led growth in HE/FE
- Strong base for innovation and technology transfer both locally and to meet wider markets – FCW, IGER, AberTechnium, new and existing businesses
- Potential to retain & attract skilled workforce / entrepreneurs
- Safeguard & enhance quality of natural and built environment to promote quality of life and local economy.
- Targeted and managed infrastructure development
- Unique development of UAV sector
- Growing community capacity

### **Threats**

- CAP reform and EU expansion
- Out migration of young & qualified
- Lack of affordable housing
- Further effects of globalisation
- Demographic imbalance
- Social exclusion & erosion of social capital
- Lack of investment in infrastructure
- Excess water supply demand
- Climate change
- Flooding from rivers and sea

The analysis points to clear evidence that the prosperity gap in Ceredigion is predominantly, though not exclusively “productivity”, rather than “activity”, based (See Appendices - Socio Economic Analysis). Despite relatively low unemployment levels and high levels of economic activity, wage rates remain stubbornly low in Ceredigion. This lack of productivity, (taken as output per employee), has been caused by two key features of the local economy. First, is an over dependence on small firms/self employment which lack economy of scale and secondly, the high presence of poor performing low productive sectors.

The Partnership have agreed that to correct the prosperity gap its vision for Ceredigion must focus on quality, added value, business growth and higher productivity, in order to ensure a higher quality of life for all residents.

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## **VISIONS**

Ceredigion is the only county to lie entirely within the Central Wales region of the **Wales Spatial Plan**. This Plan sees a future Central Wales as:

*“High-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value added activities.*

The community strategy ‘**Ceredigion 2020**’ sets out its vision as:

*‘Ceredigion in 2020 will be a self confident, healthy, caring, bilingual community, supported by a strong local economy using the skills of its people, making wise use of the resources of its high quality environment, providing opportunities for all to reach their full potential.’*

Previous economic regeneration strategies in Ceredigion developed the approach for the use of Objective 1 here included broad action themes for development to address the prosperity gap and ensure a higher quality of life for all residents by 2010.

They built upon a vision of Ceredigion in 2010 in social, economic and environmental terms with these action themes. It addressed the main issues and problems here while taking account of global and national trends and provided a clear outline of how the County should look and perform after the end of the Objective 1 Programme (2000 – 2006).

- |   |
|---|
| <ol style="list-style-type: none"><li>1. Value Added Economy</li><li>2. Innovation</li><li>3. High Quality Added Value</li><li>4. Knowledge Transfer</li><li>5. Community Regeneration</li><li>6. Equal Opportunities, Sustainability and ICT</li></ol> |
|---|

Although progress has been made, the County remains substantially disadvantaged relative to other more prosperous areas and these action themes remain fundamental to this. The Ceredigion Economic Regeneration Partnership’s Local Development Strategy both support and underpin the Ceredigion 2020 vision.

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## **STRATEGY AIMS and OBJECTIVES**

The focus of this Strategy is to raise the economic wealth and quality of life in Ceredigion by:

- Encouraging a broader range of better paid employment opportunities;
- Actions to raise economic activity rates here;
- Encouraging services that support the wider rural economy;
- Co-ordinating the development of new infrastructure and services to support business growth, including tourism and craft activities;
- Improving the physical environment of settlements and conserving the rural and natural heritage so as to support business growth
- Ensuring that every Ceredigion resident has chances and opportunities to make the most of their talents to the full and contribute to improving Ceredigion's economic performance.

To this end the Partnership have developed their Strategy based on four objectives to target the key needs within the County.

They are:

Strategic Objective 1: Ceredigion as an attractive community in which to invest and work;

Strategic Objective 2: Knowledge and innovation for growth;

Strategic Objective 3: Creating more and better jobs;

Strategic Objective 4: Focusing regeneration.

## **Strategic Objective 1**

### **Ceredigion as an attractive community in which to invest and work**

#### **Theme 1 - Support and Assistance for Businesses for growth and better paid employment opportunities**

- ❑ Increase sustainable growth of businesses
- ❑ Improve businesses competitiveness
- ❑ Assist businesses to adapt to changing circumstances
- ❑ Business Support and assistance for Enterprise

Such as:

- Mentoring / secondments
- Improve & continue Business Eye type support
- Enterprise facilitators to make mutually beneficial trading linkages between local businesses
- Private workforce for carers, private sector support for carers to access training / respite / transport

#### **Theme 2 - Entrepreneurship**

- ❑ Increase birth rate of businesses
- ❑ Improve quality of business start-ups and entrepreneurship
- ❑ Foster a culture of entrepreneurship through mentoring, remove stigma / fear of failure

Such as:

- Identify young entrepreneurs at school - retain & attract – encouraging return to Ceredigion after qualifying – incubator units financial support / incentives

#### **Theme 3 - Sites and Premises**

- ❑ To ensure that sites and premises are available to meet the existing, known, latent, and potential needs and demands of businesses and entrepreneurs

Such as:

- Serviced small scale local community enterprise – sharing facilities
- Audit of brown field sites – local locations
- Cutting down travel time commuting
- Re-use of redundant school buildings / chapels for enterprises
- Strategic assessment of sites & premises
- Basic storage facilities and smaller affordable units for local businesses in local areas (Aberaeron etc)

#### **Theme 4 - Transport**

- ❑ To improve the road, rail and air infrastructure to ensure efficient transportation to and within Ceredigion
- ❑ To encourage and promote sustainable transport initiatives that meet the needs of local people and visitors
- ❑ To increase the use of public transport

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Such as:

- Encourage Innovation through pilots
- Integration of timetables / provision (network of local delivery)
- Subsidise public transport for young people
- Transport audit – transport plans for individual communities, economic study of alternative approaches (costs / benefits)
- Strategic links to south (Pemb, Carms) and East (Powys and beyond)
- Railway enhancement – Rail Freight
- Environmental Impact assessment on any / all transport initiatives

#### **Theme 5 - Stronger Communities**

- To develop facilities which meet the needs of the local communities
- To develop initiatives that support communities and social enterprises to manage their own assets
- To encourage communities to share information, network and develop local supply chains

Such as:

- Access to services for all community members – equip all with the skills & confidence to use electronic access where possible.
- Support for affordable housing initiatives / activities

#### **Theme 6 - Branding & Marketing**

- To support the development of saleable products and services through the development and implementation of marketing strategies that feature a clear sense of the high value of Ceredigion's distinctive environmental and cultural image

Such as:

- “Sell Ceredigion” - “Ceredigion Experience”
- Pride of place & product
- Business and biodiversity – Brand
- Family History / National Library
- Green tourism
- Integration – encourage existing enterprises to exploit local cultural diversity
- Develop cultural events

#### **Theme 7 - Adding Value**

- Add value to existing and emerging internal strengths, resources and produce new products within specific sectors including agriculture, timber, knowledge and information based industries, tourism, food manufacturing, cultural and media based sectors.

Such as:

- Agri food sector support
- Fishermen “Mentoring” – kick start / handholding facilitation e.g. add value, sell locally
- Timber products – both timber and biomass
- Territorial exchange of ideas with other countries

## **Theme 8 - Environment**

- Protect and enhance the natural, cultural and marine environment as an asset
- Improve the built environment in towns and villages and conserve rural heritage
- Raising the quality of the environment
- Explore and develop new economic opportunities linked to the environment
- Ensure the integrated and sustainable management of the environment and resources

Such as:

- Marketing the environment needs to be properly co-ordinated.
- Farmers / landowners need to recognize their environment as a recreational area./health benefit
- Infrastructure development of trails such as walking – coastal path
- Biomass business spin offs
- Forestry access & exploitation
- Marine environment / sustainable fisheries
- Reducing Environmental impact through sensible joined up procurement practises (public and private sector)
- Water purity / quality / supply

## **Strategic Objective 2**

### **Knowledge and innovation for growth**

#### **Theme 1 - Innovation**

- To encourage a culture of innovation in the County
- To support take-up of innovation in businesses
- To encourage the development of an innovation supportive infrastructure to the highest standards of 'Innovation Pole'; drawing on the existing HE / IGER, AberTechnium, ParcAberporth and Food Centre Wales base.
- To encourage businesses performance improvement, survival and growth through innovation

Such as:

- Need for integrated working to maximise opportunities for larger organisations (CCC, UWL/UWA & IGER) and the local community
- Greater collaboration on R & D

#### **Theme 2 - Information Communication Technology**

- To extend basic broadband access to all settlements in the County
- To develop a higher quality broadband infrastructure and technologies to enable the development of new technology industries.

Such as:

- CT infrastructure discussions with UWA / NHS / LHB
- Addressing broadband black holes (such as Cilcennin)
- High level / Graduate level skills to support ICT businesses
- ICT centres of excellence

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### **Theme 3 - Promote ICT and Converging Technologies/Media**

- To attract, establish and develop ICT based businesses
- To foster wider application of these skills and technologies in existing and new businesses
- To ensure workforce competency
- To increase the take-up of eCommerce by local businesses and Businesses and encourage integration and advanced applications
- To encourage the take up of ICT skills and technologies within communities to disseminate and exchange good practice and innovation

Such as:

- Attracting and Retaining skills
- Basic IT skills also, avoiding digital skills divide

### **Theme 4 - Energy**

- To improve energy efficiency and conservation in Ceredigion
- To encourage the use and development of renewable energy sources in Ceredigion.
- To ensure availability of energy supply to communities and businesses
- To encourage business creation and employment opportunities in the energy sector

Such as:

- Centre of excellence – energy / waste (HE)
- Business Networks – one businesses waste is another's raw material

### **Theme 5 – Waste Minimisation & Recycling**

- To increase the efficient-use and recycling of resources in Ceredigion
- To develop markets for re-used and recycled products
- To encourage business creation and employment opportunities in the materials conservation sector

### **Strategic Objective 3**

#### **Creating more and better jobs**

##### **Theme 1 - Supporting the Workforce**

- ❑ To increase the adaptability of workers and enterprises to meet the challenges of change and competitiveness
- ❑ To attract youth into local employment
- ❑ To develop education and skills training to meet the needs of local business and innovation drivers including gaps in non mainstreaming

Such as:

- Advice and support for businesses on employing people with disabilities, including information on benefits, dispelling myths, effect of DDA on the business.
- Increased child-care and child minding provision
- Greater utilization of job share / flexible hours to benefit lone parents
- Need to address the diversity of the workforce (growing workforce from newer member states)
- Housing issues associated with this

##### **Theme 2 - Capacity Building**

- ❑ To increase the capacity of communities in Ceredigion to shape their future and become economic actors including co-operative developments
- ❑ To encourage joint working and provide advice and support to those who are particularly disadvantaged

Such as:

- Co-ordination between all benefit and advice agencies: Jobcentre plus, Disability & Carers services, Pensions, LA Housing Benefit, CAVO in benefit take up campaigns
- Social Enterprise – Review experience, Evaluate Sustainability

##### **Theme 3 - Widening Participation in Community and Work**

- ❑ To combat social exclusion and to develop initiatives that support and are aimed at disadvantaged groups.
- ❑ To encourage joint working and provide advice and support to those who are particularly disadvantaged

Such as:

- Better linkage with probation service for rehabilitation of ex-offenders
- Look at voluntary work placements as a starting point
- Car leasing scheme to new workers for first month of employment (then handed back).
- Volunteering as a pathway to return to or access work opportunities
- Financial management / debt handling advice accessible both as stand alone and as part of other training.

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## **Strategic Objective 4**

### **Focussing regeneration**

This economic regeneration strategy will support the well being of the whole County. It identifies below a spatial dimension to ensure this is achieved and to recognise the specific roles of individual centres areas and facilities in achieving this. In a number of cases these elements are supported by regeneration plans and or action plans.

#### **Theme 1 – Recognising areas of Need**

- ❑ Cardigan and South Ceredigion Regeneration Plan area
- ❑ Tregaron Upland Settlements Communities First area
- ❑ Penparcau and West Aberystwyth Communities First area

Such as:

- Cardigan Implementation Board activities

#### **Theme 2 – Clusters and Themes**

- ❑ Strategic Sites at Capel Bangor and Parc Aberporth
- ❑ 'Innovation Pole' elements at Gogerddan (IGER), AberTechnium, European UAV Centre at ParcAberporth and Food Centre Wales at Horeb.
- ❑ Knowledge economy, building on NLW, CyMal, UWA and UWL; as well as the private sector opportunities in this sector including those identified in the Earth Land Environment and Marine Sciences study undertaken for the NW and Central Wales' Spatial Plan Groups.
- ❑ Visitor and leisure led opportunities; Cardigan Bay Coast and the County's mining heritage

Such as:

- Coastal issues: water and environment
- Borth / infrastructure for sea / coastal defence and activities with associated business spin offs
- HE Sector Spin-Out
- ELEM Sciences support
- Food Centre Wales activity and linkage to the Regions for Economic Change agenda
- Continued sites and premises action to remedy market failure
- Flagship innovation projects e.g. UAV Centre and See3d

#### **Theme 3 – Supporting the County's Centres**

- ❑ Local Centres for basic services and businesses; Aberaeron, Lampeter, Llandysul and Tregaron.
- ❑ Regional centres, services, a wide range of businesses, transport hubs and linkages to strategic sites and cluster and thematic roles: Aberystwyth and Cardigan.
- ❑ Aberystwyth – a main centre within Wales
- ❑ Cardigan Implementation
- ❑ Tregaron PRF

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**Theme 4 – Retaining the rural community**

- The rural community and its basic services still represent a substantial component of our economy and need to be supported
- Enhancing, providing additional support and encourage innovation in the delivery of basic services and in meeting the needs of the rural community
- To improve the quality of life in the rural community and encourage diversification of economic activity

Such as:

- Addressing barriers to accessibility – FE / HE / Health etc.
- Encouraging individuals to achieve potential to contribute to economy and community

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## **PRIORITIES FOR ACTION**

An Action Plan will highlight how the Partnership intends to take forward this Strategy by setting out its specific priorities for each funding programme.

### **Priorities for Axes 3 and 4 of the Rural Development Plan for Wales 2007 - 2013**

For the Rural Development Plan, Axes 3 and 4, The Partnership has carefully considered its Local Development Strategy and in particular has focussed on those parts that may be best delivered by the RDP rather than other sources of domestic and European regeneration funding.

An Axis 3 and 4 RDP 2007 – 2013 Action Plan has been prepared to show time-lined priorities and activities at a higher level than individual projects. This is supported by a schedule describing these activity areas including those prioritised for action by the Ceredigion Local Action Group.

The Partnership will use this Action Plan as part of its assessment of projects and in considering whether a project should be supported by the Partnership. The Partnership will wish to support those projects that both fit with these priorities and are most able to deliver the outputs it seeks.

An objective project assessment scheme will be developed once the Welsh Assembly Government issue further detailed guidance on business plans and projects. The Partnership would, in addition to the detailed guidance issued by the Welsh Assembly Government, seek to assess projects based on the following:

- Relevance to the achievement and delivery of one or more of this Strategy's Objectives and the agreed Priorities for RDP Axes 3 and 4.
- Involvement of and impact on specific target groups listed below.
- Measurable and additional outputs.
- Demonstration of effective and inclusive partnership involvement.
- Complementarity with other local strategies.
- Complementarity with and avoidance of potential duplication of other projects or double funding
- Their longer term viability and sustainability.
- Environmental impacts / the degree to which the sustainable development agenda is addressed.
- The degree to which the project addresses diversity issues.
- Involvement of all private, public and 'third sector' in projects.

Target groups will include women and young people (including young farmers), micro-enterprises (including farming families), Welsh speaking communities, BME groups and the under-employed. Projects additionally may benefit children and the elderly.

Delivery of projects in total should have regard to the County's size and seek to achieve an appropriate geographic balance throughout the County.



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Local Development Strategy								Ceredigion RDP Priority Activities				Implementation														
Strategic Objectives																										
An Attractive Community in which to Invest & Work								Knowledge & Innovation for Growth				More & Better Jobs			Focusing Regeneration											
Themes								Theme				Theme			Theme				Year							
1	2	3	4	5	6	7	8	1	2	3	4	5	1	2	3	1	2	3	4	2008	2009	2010	2011	2012	2013	
																				<b>Village Renewal &amp; Development and Conservation / Upgrading of the Rural Heritage</b>						
																				Small scale investment in Ceredigion's built heritage.						
																				Small scale investment in heritage features in the settlements of the Communities First Tregaron Uplands area.						
																				Small scale investment in Ceredigion's natural (environmental) heritage.						
																				Targeted initiatives that address climate change and its impact on Ceredigion's environmental footprint.						
																				Targeted initiatives that promote use of non agricultural land that is either unused or under threat of becoming unused.						
																				Key fund for small scale village renewal and development / conservation.						
																				<b>Training &amp; Information for Economic actors in Axis 3 Activity</b>						
																				Targeted skills training to individuals to enable additional incomes.						
																				Targeted skills training to create employment opportunities and reduce economic exclusion.						
																				Specialist Training to Ceredigion's Micro Enterprises that increase their efficiency and profitability.						
																				Traditional skills training to meet the needs of Ceredigion's heritage.						
																				Initiatives that seek to improve healthy lifestyles in Ceredigion.						
																				<b>Skills Acquisition / Animation</b>						
																				Identify alternative and additional sources of income for farming families and the rural community.						
																				Work with voluntary and community groups activities to increase entrepreneurship						
																				Developing intergenerational activity - ensuring transfer of skill and the development of those skills to adapt and meet the current market need						
																				Animation, geographically targeted at Rural population to engage with and identify collective action for raising incomes						
																				Networking and engagement in and between local groups and individuals, mentoring - sharing knowledge on purchasing, marketing and distribution						

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## **SCHEDULE OF PRIORITISED RDP ACTIVITY AREAS**

### **Micro Enterprise Creation & Development**

- **Investment in Social Enterprise enabling growth through increased turnover and employment:** To include investment in existing social enterprises in Ceredigion enabling them to improve their trading position and increase employment. Potential partners include Pafilwn Cyf, Telynau Teifi, Menter Groups, Ymlaen Ceredigion, Waunifor, Eluned Trust, Area 43, Menter a Busnes and Antur Teifi.
- **Support to Micro Enterprise working in knowledge industries (product that is not affected by rural peripherality):** To include small scale investment in new and existing enterprises in Ceredigion, trading in knowledge or creative based products that are not disadvantaged by rural peripherality, resulting in increased turnover and employment. Potential partners include Theatr Mwldan, Antur Teifi, Menter Groups and Aberystwyth Arts Centre.
- **Establishment of Micro Enterprise to create additional rural income, not directly related to agriculture / tourism:** To include investment in micro enterprise activity based on enabling additional farming household income. Potential partners to be identified / cultivated through Axis 4 facilitation activity.
- **Support to Micro Enterprise in renewable energy and innovative recycling sectors:** To include investment in micro enterprises whose primary business deals with innovative ways of trading in renewable energy or recycling / reuse. Result in increased activity in this sector and increased turnover and employment in the enterprises. Potential partners include Craft, Ymlaen Ceredigion and Menter Groups.
- **Investment in Micro Enterprise supporting local food products:** To include investment in activity that promotes adding value to locally produced food and creating demand and markets for the products. Local networking linking producers, buyers and distribution networks. Potential partners include Antur Teifi and Ceredigion County Council.

### **Encouragement of Tourism Activity**

- **Geographically targeted investment in small-scale accommodation, facilities or infrastructure:** Geographically targeted investment that seeks to enhance areas such as the Cambrian Mountains area of Ceredigion as a destination through small-scale investment in accommodation, rights of way, and outdoor activity based tourism. Potential partners include Eluned Trust, Ceredigion County Council, CCW, Forestry Commission and Menter a Business.
- **Investment in small-scale environmental tourism that maximises use of Ceredigion's rural environment:** Small scale investment in environmental tourism features that enhance Ceredigion's rural environment. Rights of way, viewing points, site remediation of areas of tourism value, environmentally themed tourism opportunities, linked tour packaging between rural accommodation points where visitors travel by means other than car and have their luggage transported for them. Potential partners include Menter Groups, Community Councils, County Council, Antur Teifi, National Trust and Menter a Busnes.

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- **Support to local events that add to tourism experience in Ceredigion and help to brand the county as a distinctive destination:** Small scale investment in events that add distinctiveness and interest to Ceredigion as a place to visit. Investment to be on a sliding scale so that there is a drive to make these events sustainable. Potential partners include Menter Groups, Antur Teifi and Menter a Business.
- **Support to specific marketing initiatives that focus on Ceredigion's "Jewels":** Investment in small specific marketing initiatives that seek to sell particular features of Ceredigion that have outstanding visitor attraction potential. Examples include the Teifi Estuary, The Cambrian Mountains, and Ceredigion Coast Path. Potential partners include Menter Groups, and the County Council. Results in increased visitor numbers.
- **Support for small-scale high value tourism products:** Small-scale investments in niche tourism products that potentially have a high value. Examples include equine tourism and cultural / heritage tourism. Potential partners include the Urdd Llangrannog, Arts Centre Aberystwyth, Theatr Mwldan

### **Basic Services for Rural Economy & Population**

- **Small-scale investment in village community facilities that improve the built or natural environment and contribute to the quality of life:** Small scale investment in features such as village greens, public gardens, village halls, public recreation areas, that improve the built or natural environment and contribute to raising the quality of life for the rural population of Ceredigion. Potential partners include Community Councils, Community Halls, and Menter Groups.
- **Small-scale investment in basic services that contribute to the well-being of the rural population in Ceredigion:** Small-scale investment in facilities such as swimming pools, family centres, substance misuse treatment facilities and local transport initiatives. Potential partners include Metro Lluest, Waunifor, Menter Groups, Antur Teifi, swimming pool trusts, family centres, and substance misuse organisations.
- **Small-scale investment in innovative or community led transport initiatives that help to counter rural peripherality:** Investment in innovative local transport initiatives that address specific local problems. Potential partners include CAVO, Menter Groups and the County Council.

### **Village Renewal & Development and Conservation / Upgrading of the Rural Heritage**

- **Small scale investment in Ceredigion's built heritage:** Small-scale investment in heritage features and their interpretation that enhances their visitor appeal, adds economic value and contributes to the visitor experience in Ceredigion. Potential partners include Hanes Aberteifi, Menter Groups, Waunifor, National Trust and CCW.
- **Small scale investment in heritage features in the settlements of the Communities First Tregaron and Uplands area:** Targeted small scale investment that enables improvements to the heritage features of the villages in the Tregaron Uplands Communities First area. Potential partners include the County Council, and the local Communities First Partnership.
- **Small scale investment in Ceredigion's natural (environmental) heritage:** Small-scale investment in natural environmental features accessible by visitors that adds economic value, understanding and interest to those features. Potential partners

include the County Council, Menter Groups, Shared Earth Trust, National Trust, CCW and SW Wales Wildlife Trust.

- **Targeted initiatives that address climate change and its impact on Ceredigion's environmental footprint:** Financing of audit and advice work that seeks to raise the profile of cause and effect of individual actions on climate change and Ceredigion's environmental footprint. Potential partners include Ymlaen Ceredigion and Antur Teifi.
- **Targeted initiatives that promote use of non agricultural land that is either unused or under threat of becoming unused:** Small-scale investment to enhance the economic use of non agricultural land such as waste land, forestry and other non productive pieces of land. Potential partners include Antur Teifi, CCW, Shared Earth Trust and the Forestry Commission.

### **Training & Information for Economic actors in Axis 3 Activity**

- **Targeted skills training to individuals to enable additional incomes:** Skills training that addresses very local needs and contributes to raising household income. Potential partners include Llandysul Family Centre, Antur Teifi, Area 43 and Menter a Business.
- **Targeted skills training to create employment opportunities and reduce economic exclusion:** Locally based skills training that engages with socially excluded groups using specialised engagement channels to recruit and retain individuals. Potential partners include Rhoserchan, Area 43 and Mentro Lluest.
- **Specialist training to Ceredigion's Micro Enterprises that increase their efficiency and profitability:** Locally delivered training that addresses specific skills shortage in Ceredigion Micro Enterprises that enables them to become more profitable and sustainable. Potential partners include Menter a Busnes, Aberystwyth Arts Centre and Ymlaen Ceredigion.
- **Traditional skills training to meet the needs of Ceredigion's heritage:** Specialised skills training associated with traditional techniques required to maintain, sustain and develop many of Ceredigion's heritage assets. Potential partner includes National Trust.
- **Initiatives that seek to improve healthy lifestyles in Ceredigion:** Local training and advice aimed at improving healthy lifestyles of Ceredigion's rural population. Potential partner: Ymlaen Ceredigion.

### **Skills Acquisition / Animation**

- **Identifying alternative and alternative sources of income for farming families and the rural communities:** which may include trail and accommodation, local food packages, developing opportunities for young people to stay in their local community . Developing the complete farm visit experience. Potential partner: Ceredigion Local Action Group
- **Work with voluntary and community groups and activities to increase entrepreneurship:** to include activities developing and improving quality of product/service and distribution. To foster entrepreneurship and personal development. Potential partner: Ceredigion Local Action Group, CAVO, RCA Cynnal Ceredigion
- **Developing intergenerational activity** - ensuring transfer of skills and the development of those skills to meet the current market need: to recognise the variety of skills available and encourage generations to work together and gain respect,

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responsibility and leadership skills. This to include developing local mentors. Potential partner: Ceredigion Local Action Group, Young People's Partnership, 50 plus Forum

- **Animation, geographically targeted at rural population**, to engage with and identify collective action for raising incomes: Recognising and working with uniqueness of area and identifying skills required to develop opportunities to enhance the quality of life and pride in the community. Developing small scale clusters. Potential partner: Ceredigion Local Action Group, Menter a Busnes
- **Networking and engagement in and between local groups and individuals:** support and work with existing networks and identify opportunities for future activity to include sharing of good practice. To include exploring and investing innovative ways in reaching and engaging with people and the integration of rural population. Potential partner: Ceredigion Local Action Group, Ceredigion 2020.

## **LINKS TO OTHER POLICIES, PROGRAMMES AND INITIATIVES**

### **Community Strategy**

The approach adopted in Ceredigion has been to embed the Local Development Strategy within the community strategy process. The Partnership is one of the thematic partnerships supporting the community strategy partnership, Ceredigion 2020. The Chair of the Ceredigion Economic Regeneration Partnership is a full member of the community strategy partnership. The Ceredigion Local Action Group also acts as the 'Stronger Communities' Thematic Group and has the cross-cutting responsibility within the Strategy for community engagement. The proposals were discussed and endorsed by Ceredigion 2020 at its meeting on January 22<sup>nd</sup> 2007. In developing the approach the Ceredigion Economic Regeneration Partnership has involved other partnerships and thematic groups within the 'community strategy family' both by inviting attendance at meetings and by sharing agendas and papers and by active involvement in the networks supporting these partnerships.

### **Wales Spatial Plan and linkages to the Convergence Programmes**

The Partnership has sought to develop this Strategy in conformity with the Spatial Plan and welcomes the opportunity for the Central Wales Group to consider it. The Strategy seeks to guide regeneration funding in Ceredigion from many sources and therefore the fourth Strategic Objective of this Strategy seeks to reflect the Plan. This Strategy will be an important input into the Central Wales Spatial Framework and a vital link in communicating local needs, aspirations and wishes with the frameworks of the Convergence Programmes.

### **Rural Community Action Programme – Cynnal Ceredigion**

The Partnership oversees the work of Cynnal Ceredigion and receives quarterly reports on the progress of this programme. This close working and overview of both deliveries will ensure, not only that there is no duplication of effort or resources, but that the very best results can be achieved here drawing on the existing skills and capacity within the County. The Cynnal Ceredigion Lead Body, Antur Teifi is a full member of the Partnership and there is close working on the delivery of the Programme. Information and analysis is shared and the proposals for Axis 4 priorities draw on the experience of RCA in Ceredigion and Antur Teifi are members of the Ceredigion Local Action Group. Many of the Ceredigion Economic Partnership's members are active in the RCA programme.

### **Communities First Partnerships**

There are two Communities First Partnerships in Ceredigion. Linkages have been built into the proposed approaches and Partnership representatives are actively involved in the Ceredigion Local Action Group. Further linkages between the delivery of Axes 3 and 4 and Communities First in working at the 'grass-roots' level and developing capacity within the community can be achieved because of the common line management of the 'Lead Body' functions within the Corporate and Legal Services Department of the County Council.

This Strategy will be reviewed regularly by the Partnership in the light of the progress and changes in external circumstances. This will provide an opportunity for all interested parties to participate in the implementation and delivery of the economic regeneration within Ceredigion.

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This review process will be co-ordinated by the Ceredigion Economic Regeneration Partnership and will take into account the development of other strategies and the evolving role of the Wales Spatial Plan

## **EXPERIENCE OF THE CEREDIGION ECONOMIC REGENERATION PARTNERSHIP**

The Partnership has overseen the delivery of the Objective 1 Programme locally in Ceredigion since it was first established. It draws together many partners who have been active in delivering previous European and domestic funded programmes. These include County Council officers and voluntary organisation officers involved in the Objective 5b and LEADER 1 and LEADER 2 programmes. The Partnership includes those delivering initiatives such as the RCA programme -Cynnal Ceredigion and individual projects many with relevance to Axes 3 and 4.

The membership provides a vital link in joining up its work with all the other partnerships in the County both directly and indirectly through the Ceredigion 2020 Partnership.

The Lead Body/ Secretariat team actively network with the partnerships and their appropriate lead officers through the Partnership Integration Group and the Data Sharing group. They provide aftercare to Objective 1 projects funded through the ERDF, EAGFF and FIG and have substantial experience in supporting many community led projects, many of them of considerable size. They have a range of skills in dealing with problems and in assisting groups to find their own solutions to problems as they arise.

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Partneriaeth Adfywio Economaidd  
Ceredigion  
Economic Regeneration Partnership

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**Bwrdd y Bartneriaeth** Blwch Post 30 / PO Box 30  
*Independent Chair of* Penmorfa  
*Partnership Board* Aberaeron  
SA46 0YG  
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<b>Partneriaid y Sector Chymunedol /</b> <b>Voluntary Partners</b>		<b>Partneriaid y Sector Gwirfoddol /</b> <b>Community Partners</b>		<b>Partneriaid O'r Sector Cyhoeddus /</b> <b>Public Partners</b>		<b>Y Sector Breifat &amp; Partneriaid Cymdeithasol arall / Private Sector &amp; other Social Partners</b>	
<i>Aelod Llawn</i> Full Member	<i>Aelod Llanw</i> Alternate Member	<i>Aelod Llawn</i> Full Member	<i>Aelod Llanw</i> Alternate Member	<i>Aelod Llawn</i> Full Member	<i>Aelod Llanw</i> Alternate Member	<i>Aelod Llawn</i> Full Member	<i>Aelod Llanw</i> Alternate Member
<b>Cymdeithas Mudiadau Gwirfoddol Ceredigion/CAVO</b>		<b>Un Llais i Gymru /One Voice Wales</b>		<b>Cyngor Sir/County Council</b>		<b>Twristiaeth / Tourism</b>	
Hazel Lloyd	Sandra Morgan	Cllr Geraint Evans	Ms Nona Evans	Cllr Eurfyl Evans	Allan Lewis	Dee Reynolds	*
<b>Addsyg Uwch / Higher Education</b>		<b>Asiantaeth Fenter/ Enterprise Agency</b>		<b>Llywodraeth Cynulliad Cymru / WAG</b>		<b>Undebau Llafur – Cyngor Undebau Llafur / Trade Union (TUC)</b>	
Sarah Dykes	Ian Roffe	Dewi Williams	Rhiannon Thomas	Ann Watkin	Peter James	Geraint Davies	*
<b>Grwp Amgylcheddol/ Environmental Group</b>		<b>Partneriaeth Leol (De)/ Local Partnership (South)</b>		<b>Ieuenctid / Youth</b>		<b>Amaethyddiaeth a Physgodfeydd / Agriculture and Fisheries</b>	
		Teleri Davies	Greg Evans	Ann Sweeting		Ruth Davies	Lewis Griffith
<b>Coleg Ceredigion</b>		<b>Partneriaeth Leol (Gogledd)/ Local Partnership (North)</b>		<b>Forestry Commission</b>		<b>Siambwr Fasnach Ceredigion Ceredigion Chamber of Commerce</b>	
Luned Jones	*	Louise Amery	Ann Ffrancon	Paul Finch	Debbie Westlake	Rod Pritchard	Julian Beynon-Lewis
<b>Ymlaen Ceredigion</b>						<b>Celfyddydau a Diwylliant/ Arts &amp; Culture</b>	
Bob Jacques	*					Dilwyn Davies	Alan Hewson
<b>Ieuenctid/Youth</b>							
Phil Layton							

## **CONTACT DETAILS OF PARTNERSHIP MEMBERS AND ALTERNATES**

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#### **Independent Chair**

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Paul Finch                      Forestry Commission, Victoria House, Victoria Terrace, Aberystwyth, SY23 2DQ. Tel: 0845 604 0805  
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Ruth Davies                    NFU, c/o PO Box 30, Penmorfa, Aberaeron, SA46 0YG. Tel: 01545 572063  
Lewis Griffith / Owen Jenkins / Rod Pritchard              FUW, 1 North Road, Aberaeron, SA46 0JE. Tel: 01545 571222  
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**Advisors**

Sue Byrne                      CCW  
Ann Rybij                      Visit Wales, Welsh Assembly Government  
Matthew Ross                Environment Agency  
Alan Dutton                  Job Centre Plus  
Sue Hurds                      Ceredigion Local Health Board  
Rachel Russell                National Public Health Service for Wales (NPHS)  
Lowri Edwards                Cyngor Sir Ceredigion ( Lead Officer for Ceredigion 2020)  
Mark Elliot                    Cyngor Sir Ceredigion

**LEAD BODY AND SECRETARIAT**

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## **CEREDIGION LOCAL ACTION GROUP MEMBERS**

### **Membership of the Ceredigion Local Action Group**

Economic Members	Dewi Williams	Antur Teifi, Parc Business, Aberarad, Newcastle Emlyn, SA39 9DB
	Ceredigion County Council	Neuadd Cyngor Ceredigion, Penmorfa, Aberaeron, SA46 0PA
	Eirwen Williams	Menter a Busnes
Civil Society Members	Ruth Davies	NFU, c/o PO Box 30, Penmorfa, Aberaeron, SA46 0YG
	Owen Jenkins	1 North Rd, Aberaeron, SA46 0JE
	Alan Wilson	Menter Aberteifi, Green Villas, Cardigan, SA43 1JA
	Greg Evans	Menter Llambled, Pryfsgol Llambled, Lampeter, Ceredigion
	Gill Hopley	Cei Dev, Paragon House, The Old Chambers, Wellington Place, New Quay, SA45 9NS
	Peter Lloyd Harvey	Ty Lisburne, Pontrhydygroes, Ystrad Meurig, Cerdigion, SY25 6DQ
	Ray Quant	Menter Aberystwyth, Office B6, The Cambria, Marine Terrace, Aberystwyth, SY23 2AZ
	Keith Evans	Menter Llandysul Pontweli Ymlaen, Old Post Office, New Rd, Llandysul, SA44 4QJ
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	Elizabeth Evans	Merched Y Wawr, Stryd yr Efail, Aberystwyth, SY23 1JH
	Gareth Lloyd	CFFI Ceredigion, 1 Ffordd Y Gogledd, Aberaeron, SA46 0JD
	Bethan Willams	WI, Hendre, Llangrannog, Ceredigion
	Ionwen Lewis	Women's Food & Farming Union,
	Eirwen James	Cymunedau yn Gyntaf Tregaron a'r Ucheldir, Neuadd Goffa, Y Sgwar, Tregaron, SY25 6JL
	Chris Simpson	Communities First Aberystwyth & Penparcau, 11 Baker St, Aberystwyth, SY23 2BJ
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	Dwynwen Lloyd Evans	Theatr Felinfach (Pwerdai),Theatr Felinfach, Dyffryn Aeron, Ceredigion, SA48 8AF
	Dilwyn Jones	Cered, (Menter Iaith Ceredigion), Theatr Felinfach, Dyffryn Aeron, Ceredigion, SA48 8AF
	Ben Davies	One Voice Wales, c/o PO Box 30, Penmorfa, Aberaeron, SA46 0YG

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## Appendix 1 Ceredigion Profile

### Resident population Ceredigion

Estimates	Thousands
June 2005	78.3
June 2004	78.1
June 2003	77.2
June 2002	76.5
June 2001	75.4

### Total population

	Ceredigion (numbers)	Wales (numbers)	GB (numbers)
All people	77,200	2,938,000	57,851,100
Males	37,800	1,425,600	28,275,200
Females	39,400	1,512,400	29,575,900

Crown Copyright Source: midyear population estimates (2003)

The estimated population includes all those usually resident in the area, whatever their nationality. HM Forces stationed outside the United Kingdom are excluded but foreign forces stationed here are included. Students are taken to be resident at their term-time address.

### Working age population

Percentages are based on total population.

	Ceredigion (numbers)	Ceredigion (%)	Wales (%)	GB (%)
All people - working age	47,900	62.0	59.6	61.4
Males - working age	24,800	65.6	62.8	64.6
Females - working age	23,100	58.5	56.5	58.3

Crown Copyright Source: midyear population estimates (2003)

**Working age** includes males aged 16 to 64 and females aged 16 to 59.

## Labour supply

### Economically active

Percentages are based on working age population, except unemployed which is based on economically active.

	<b>Ceredigion (numbers)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
<b>All people</b>				
Economically active	35,000	72.9	74.2	78.2
In employment	33,000	68.0	70.5	74.3
Employees	24,000	49.7	61.6	64.8
Self employed	8,000	17.7	8.4	9.0
Unemployed	2,000	6.7	5.1	5.0
<b>Males</b>				
Economically active	18,000	74.1	78.6	83.4
In employment	17,000	67.7	74.0	78.9
Employees	11,000	42.6	61.4	65.5
Self employed	6,000	24.3	12.0	13.0
Unemployed	2,000	8.6	5.9	5.4
<b>Females</b>				
Economically active	17,000	71.6	69.6	72.8
In employment	16,000	68.3	66.7	69.5
Employees	13,000	57.3	61.7	64.2
Self employed	2,000	10.5	4.5	4.8
Unemployed	1,000	4.6	4.2	4.5

Crown Copyright Source: local area labour force survey (Mar 2003-Feb 2004)

Figures for the economically active and inactive tables are taken from the annual Local Area Labour Force Survey. The annual local area LFS dataset includes surveys conducted between March and February of each year. As LFS estimates are based on statistical samples, they are subject to sampling variability. This means that if another sample for the same period were drawn, a different estimate might be produced. In general, the larger the number of people in the sample, the smaller the variation between estimates. Estimates for Ceredigion are therefore less reliable than those for larger areas such as regions. When the sample size is considered too small to produce reliable estimates, the estimates are replaced with a # in tables.

The concepts and definitions used in the LFS are agreed by the International Labour Organization (ILO), an agency of the United Nations. As a household survey, the figures relate to where people live.

**Economically active:** People aged 16 and over who are either in employment or unemployed.

**Economic activity rate (working age):** The number of people, who are economically active aged 16 to 59/64, expressed as a percentage of all working age people.

**In employment:** People aged 16 or over who did some paid work in the reference week (whether as an employee or self employed); those who had a job that they were temporarily away from (on holiday, for example); those on Government supported training and employment programmes; and those doing unpaid family work.

**Employment rate (working age):** The number of people in employment aged 16 to 59/64 expressed as a percentage of all working age people.

**Employees and self employed:** The division between employees and self employed is based on survey respondents' own assessment of their employment status. The percentage show the number in each category as a percentage of all working age people.

**Unemployment:** Refers to people without a job who were available to start work in the two weeks following their LFS interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.

**Unemployment rate (working age):** The number of unemployed people aged 16 to 59/64 expressed as a percentage of the economically active population aged 16 to 59/64

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## Economically inactive

Percentages are based on working age population

	Ceredigion (numbers)	Ceredigion (%)	Wales (%)	GB (%)
<b>All people</b>				
Economically inactive	13,000	27.1	25.8	21.8
Wanting a job	3,000	5.5	6.1	5.7
Not wanting a job	10,000	21.6	19.6	16.1
<b>Males</b>				
Economically inactive	6,000	25.9	21.4	16.6
Wanting a job	1,000	5.5	5.2	4.7
Not wanting a job	5,000	20.4	16.2	11.9
<b>Females</b>				
Economically inactive	7,000	28.4	30.4	27.2
Wanting a job	1,000	5.5	7.1	6.7
Not wanting a job	5,000	22.9	23.3	20.5

Crown Copyright Source: local area labour force survey (Mar 2003-Feb 2004)

**Economically inactive:** People who are neither in employment nor unemployed. This group includes, for example, all those who were looking after a home or retired.

**Wanting a job:** People not in employment who want a job but are not classed as unemployed because they have either not sought work in the last four weeks or are not available to start work.

**Not wanting a job:** People who are neither in employment nor unemployed and who do not want a job.

## Employment by occupation

Percentages are based on all persons in employment.

	Ceredigion (numbers)	Ceredigion (%)	Wales (%)	GB (%)
Soc 2000 major group 1-3	13,000	37.1	36.1	40.5
1 Managers and senior officials	5,000	14.3	12.1	14.6
2 Professional occupations	4,000	12.8	10.9	12.1
3 Associate professional & technical	3,000	10.1	13.1	13.8
Soc 2000 major group 4-5	9,000	27.7	25.3	24.4
4 Administrative & secretarial	3,000	10.1	12.2	13.0
5 Skilled trades occupations	6,000	17.6	13.0	11.4
Soc 2000 major group 6-7	5,000	15.2	16.2	15.5
6 Personal service occupations	3,000	9.2	7.9	7.5
7 Sales and customer service occs	2,000	6.0	8.3	8.0
Soc 2000 major group 8-9	7,000	19.9	22.3	19.6
8 Process plant & machine operatives	2,000	5.9	9.7	7.7
9 Elementary occupations	5,000	14.0	12.6	11.8

Crown Copyright Source: local area labour force survey (Mar 2003-Feb 2004)

## Qualifications

All figures are for working age. For an explanation of the qualification levels see the definitions section.

	<b>Ceredigion (numbers)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
NVQ4 and above	12,000	24.8	22.5	25.2
NVQ3 and above	24,000	49.1	40.2	43.1
NVQ2 and above	33,000	69.1	60.3	61.5
NVQ1 and above	39,000	80.7	74.2	76.0
Other Qualifications	3,000	6.3	8.0	8.8
No Qualifications	6,000	13.0	17.8	15.1

Crown Copyright Source: local area labour force survey (Mar 2003-Feb 2004)

### Qualifications

**No qualifications:** No formal qualifications held

**Other qualifications:** includes foreign qualifications and some professional qualifications

**NVQ 1 equivalent:** e.g. fewer than 5 GCSEs at grades A-C, foundation GNVQ, NVQ 1, intermediate 1 national qualification (Scotland) or equivalent

**NVQ 2 equivalent:** e.g. 5 or more GCSEs at grades A-C, intermediate GNVQ, NVQ 2, intermediate 2 national qualification (Scotland) or equivalent

**NVQ 3 equivalent:** e.g. 2 or more A levels, advanced GNVQ, NVQ 3, 2 or more higher or advanced higher national qualifications (Scotland) or equivalent

**NVQ 4 equivalent and above:** e.g. HND, Degree and Higher Degree level qualifications or equivalent

## Earnings by residence

Average earnings in pounds for employees living in the area.

	<b>Ceredigion (pounds)</b>	<b>Wales (pounds)</b>	<b>GB (pounds)</b>
<b>Gross weekly pay</b>			
Full-time workers	#	416.0	475.8
Male full-time workers	#	449.8	525.0
Female full-time workers	#	358.4	396.0
<b>Hourly pay</b>			
Full-time workers	#	10.5	12.0
Male full-time workers	#	10.9	12.8
Female full-time workers	#	9.6	10.6

Crown Copyright Source: New Earnings Survey : residence based statistics by SOC 2000 occupation (2003)

### # Sample size too small for reliable estimate **Earnings by residence**

The figures show the average earnings in pounds for employees living in the area who are on adults rates of pay and whose pay was not affected by absence. Figures for earnings come from the New Earnings Survey (NES). The NES is based on a 1 per cent sample of employees, information on whose earnings and hours is obtained from employers. The survey does not cover self-employed. In 2003 information related to the pay period which included 9 April.

The earnings information collected relates to gross pay before tax, national insurance or other deductions, and excludes payments in kind. It is restricted to earnings relating to the survey pay period and so excludes payments of arrears from another period made during the survey period; any payments due as a result of a pay settlement but not yet paid at the time of the survey will also be excluded.

NES estimates from Nomis may differ slightly from those produced directly by ONS (eg published volumes) due to different geographic bases. In this respect estimates produced by ONS will be given definitive status by National Statistics.

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## Working-age benefits

The Jobseeker's Allowance (JSA) is payable to people under pensionable age who are available for, and actively seeking, work of at least 40 hours a week.

### Total JSA claimants

The percentage figures show the number of JSA claimants as a proportion of resident working-age people.

	<b>Ceredigion (numbers)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
All people	689	1.4	2.2	2.2
Males	496	2.0	3.2	3.1
Females	193	0.8	1.1	1.2

Crown Copyright Source: claimant count with rates and proportions (December 2004)

JSA claimant count records the number of people claiming Jobseekers Allowance (JSA) and National Insurance credits at Jobcentre Plus local offices. People claiming JSA must declare that they are out of work, capable of, available for and actively seeking work during the week in which the claim is made.

The percentage figures express the number of claimants resident in an area as a percentage of the working age population resident in that area. Working age is defined as 16-64 for males and 16-59 for females. The working age population figures used to calculate claimant count proportions are derived from the mid-2002 population estimates.

The count of total JSA claimants is mostly derived from the Jobcentre Plus computer records. For various reasons, e.g. when a claimant's National Insurance number is not known, a few claims have to be dealt with manually by local offices. These clerical claims, which amount to less than 1 per cent of the total, are counted separately and not analysed in as much detail as the computerised claims. The count of total JSA claimants includes clerical claims, but only the computerised claims are analysed by age and duration.

### JSA claimants by age and duration

The percentage figures represent the number of JSA claimants in a particular category as a percentage of all JSA claimants.

	<b>Ceredigion (numbers)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
<b>by age of claimant</b>				
Aged 18-24	215	31.9	32.8	27.8
Aged 25-49	310	45.6	49.7	54.0
Aged 50 and over	145	21.5	16.4	16.9
<b>by duration of claim</b>				
Up to 6 months	550	81.4	73.0	69.0
Over 6 up to 12 months	65	9.7	13.1	15.8
Over 12 months	60	8.8	13.9	15.2

Crown Copyright Source: claimant count - age and duration (December 2004)

## Labour demand

### Jobs density

The density figures represent the ratio of total jobs to working-age population.

	<b>Ceredigion (jobs)</b>	<b>Ceredigion (density)</b>	<b>Wales (density)</b>	<b>GB (density)</b>
Jobs Density	33,000	0.7	0.7	0.8

Crown Copyright Source: jobs density (2002)

The numbers of jobs per resident of working age (16-59/64). For example, a job density of 1.0 would mean that there is one job for every resident of working age. The total number of jobs is a workplace-based measure and comprises employees, self-employed, government-supported trainees and HM Forces. The number of working age residents figures used to calculate jobs densities are based on the mid-2001 population estimates

## Employee jobs

Percentages are based on total employee jobs.

	<b>Ceredigion (employee jobs)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
Total employee jobs	23,177	-	-	-
Full-time	13,406	57.8	66.2	68.1
Part-time	9,771	42.2	33.8	31.9
Manufacturing	1,231	5.3	16.1	12.6
Construction	782	3.4	4.2	4.4
Services	20,899	90.2	77.9	81.4
Distribution, hotels & restaurants	6,263	27.0	23.5	24.7
Transport & communications	815	3.5	4.6	6.0
Finance, IT, other business activities	2,187	9.4	11.9	19.8
Public admin, education & health	10,129	43.7	32.8	25.8
Other services	1,505	6.5	5.0	5.2
Tourism-related	2,893	12.5	8.1	8.1

Crown Copyright Source: annual business inquiry employee analysis (2003)

### Employee jobs

The number of jobs held by employees. The information comes from the Annual Business Inquiry (ABI) - an employer survey conducted in December of each year. The survey samples around 78,000 businesses. The ABI records a job at the location of an employee's workplace (rather than at the location of the business's main office).

**Full-time and part-time:** In the ABI, part-time employees are those working for 30 or fewer hours per week.

**Tourism-related** includes the following sectors:

- 551 Hotels
- 552 Camping sites etc
- 553 Restaurants
- 554 Bars
- 633 Activities of travel agencies etc
- 925 Library, archives, museums etc
- 926 Sporting activities
- 927 Other recreational activities

## VAT registered businesses

Percentages are based on stock (at end of year).

	<b>Ceredigion (numbers)</b>	<b>Ceredigion (%)</b>	<b>Wales (%)</b>	<b>GB (%)</b>
Registrations	210	5.6	8.7	10.6
Deregistrations	270	7.3	8.8	9.7
Stock (at end of year)	3,720	-	-	-

Crown Copyright Source: vat registrations/deregistrations by industry (2003)

VAT registrations and de-registrations are the best official guide to the pattern of business start-ups and closures. They are an indicator of the level of entrepreneurship and of the health of the business population. As such they are used widely in regional and local economic planning.

The source of these figures is the Inter-Departmental Business Register (IDBR) which contains records of all businesses registered for VAT. Coverage of the statistics is complete in all parts of the economy except a few VAT exempt sectors and the very smallest one person businesses operating below the threshold for VAT registration (at the end of 2002, the VAT threshold was an annual turnover of 55,000).

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**Appendix 2: SOCIO-ECONOMIC ANALYSIS**

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**1.1. Introduction**

It is important from the outset to produce a clear picture of the socio-economic conditions of Ceredigion. This analysis is important in order to establish where the economy is now, what the underlying forces have been over recent years, and most importantly, where the economy is heading. This quantitative analysis then allows us to tackle more qualitative issues such as why the economy is in its current position and what actions should be taken to improve its future course.

**1.2. Demography**

Ceredigion, with a population of just over 70,000, is one of the fastest growing counties in Wales. The predicted average annual percentage change for 1997 to 2007 is 0.1%, the same rate as the Welsh average. The positive population increase between 1991 and 1997 has been the result of net migration. Migration accounted for 5,000 during this period and the negative natural change was 1,000. The impact of this change cannot be underestimated.

Ceredigion has fewer proportions of people aged 15 and below, when compared to the Welsh proportions and other rural Objective 1 areas. The county has higher proportions of people within the working age suggesting an above average rate of adults with no children. This is mainly due to the student concentration that skews the population distribution. As a result, the percentage within the retirement band is similar to that of the Wales average.

The proportion of the population that can speak Welsh according to the 1991 census is 59%. This compares to a national percentage of 19%.

**Table 1: Population Change 1991 – 2007**

	1991	1997	2007	Average annual % change	
				1991-97	97-07
Ceredigion	70.2	70.5	71.0	0.1	0.1
Wales	2887.6	2925.0	2964.9	0.2	0.1

Source: Business Strategies Limited, 1998

**Table 2: Ceredigion Demography**

Proportion of 1997 population	Aged under 5	Aged 5 to 15	Aged 16 to 59/64	Over retirement age	Total
Isle of Anglesey	6.0	14.7	57.6	21.7	100.0
Gwynedd	5.8	13.7	58.5	22.0	100.0
Carmarthenshire	5.5	13.4	58.0	23.1	100.0
Pembrokeshire	5.8	14.8	58.4	21.0	100.0
<b>Ceredigion</b>	<b>4.8</b>	<b>12.8</b>	<b>60.7</b>	<b>21.8</b>	<b>100.1</b>
Wales	6.0	14.7	57.6	21.7	100.0

Source: 1999 Digest of Welsh Local Area Statistics

**Table 3: Proportion of the population that can speak Welsh**

Age	3-15	16-29	30-44	45-59/65	59/64+	Total 3+
Ceredigion	75%	59%	52%	54%	60%	59%
Wales	24%	16%	15%	17%	22%	19%

Source: 1991 Census

### **1.3. Activity rates**

The activity rate for Ceredigion is slightly above the Welsh activity rate. Over time the activity rate for Ceredigion has constantly increased during the 1980s and 1990s. The economic activity rate stood at 71.3 in 1981, 73.1 in 1991 and reached 74.2 by 1997

Ceredigion compared favourably to only two other rural Objective 1 areas in terms of economic activity rates, Anglesey and Gwynedd. The economic activity rate for Ceredigion is attributable to very high female activity rates, being second only to Denbighshire within the rural Objective 1 area. The male activity rate, however, is amongst the lowest in rural Objective 1 areas.

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**Table 4: Economic Activity Rates by Unitary Authority 1997**

	Persons	Males	Females
Anglesey	71.5	77.1	65.2
Carmarthenshire	76.1	84.2	66.0
<b>Ceredigion</b>	<b>74.2</b>	<b>75.8</b>	<b>72.0</b>
Conwy	74.7	78.0	71.5
Denbighshire	76.7	78.0	75.3
Gwynedd	73.6	75.6	71.2
Pembrokeshire	76.6	80.1	72.7
Wales	74.0	78.8	68.6

Source: Annual Labour Force Survey

**Table 5: Local area labour market summary**

	Ceredigion
Total aged 16 and over	54,000
Total economically active	31,000
Total in employment	28,000
Economically inactive	23,000

Source: Labour Force Survey 1997

#### **1.4. Unemployment**

The unemployment rate for Ceredigion is comparatively low to Wales and other rural Objective 1 areas, at 4.3% as at October 1998. The county has disproportionately higher short-term unemployment rates and lower long-term rates when compared to Wales and rural Objective 1 areas. Over 62% of the unemployment in Ceredigion is less than 6 months, compared to the national proportion of 58%. The unemployment pattern in Ceredigion shows greater resemblance to that of Wales than other rural Objective 1 areas such as Anglesey and Gwynedd.

**Table 6: Claimant unemployed average Nov 1997 – October 1998 and claimant unemployed by duration October 1998**

	Number	Rate	<6 months	6m – 1 yr	1 yr+
Isle of Anglesey	2343	10.0	44.7	16.0	39.4
Gwynedd	3959	7.2	52.9	14.9	32.2
Powys	1916	3.3	63.6	16.2	20.2
Pembrokeshire	3751	8.4	56.9	15.0	28.1
Carmarthenshire	3685	4.9	60.3	15.8	23.9
<b>Ceredigion</b>	<b>1413</b>	<b>4.3</b>	<b>62.2</b>	<b>14.6</b>	<b>23.2</b>
<b>Wales</b>	<b>70407</b>	<b>5.6</b>	<b>58.0</b>	<b>17.2</b>	<b>24.8</b>

Source: Claimant Count, ONS

The geographical distribution of unemployment within Ceredigion varies considerably. The Cardigan and Lampeter/Aberaeron Travel to Work Areas have relatively high unemployment rates and Aberystwyth TTWA has one of the lowest unemployment rates in Wales. This difference has reduced somewhat between 1991 and 1997 but is still marked. Lampeter/Aberaeron is emerging as the worst TTW area rather than Cardigan by 1997.

**Table 7: Unemployment by Travel to Work Area: Narrow Base Rates 1991 – 1997**

	1991		1993		1995		1997	
	Jan	July	Jan	July	Jan	July	Jan	July
<b>Aberystwyth</b>	<b>6.4</b>	<b>7.0</b>	<b>7.2</b>	<b>9.7</b>	<b>8.3</b>	<b>9.6</b>	<b>7.5</b>	<b>8.5</b>
<b>Cardigan</b>	<b>12.4</b>	<b>16.3</b>	<b>18.1</b>	<b>15.1</b>	<b>13.2</b>	<b>13.0</b>	<b>11.2</b>	<b>9.0</b>
<b>Lampeter &amp; Aberaeron</b>	<b>9.5</b>	<b>12.8</b>	<b>14.2</b>	<b>12.0</b>	<b>11.9</b>	<b>11.3</b>	<b>12.0</b>	<b>10.3</b>
Mid and West Wales	8.3	9.4	12.4	11.1	10.3	9.7	9.7	7.9
Great Britain	7.8	9.5	12.4	11.8	10.1	9.4	7.8	6.4

Source: ONS (NOMIS) and Employment Information Unit, Cardiff

Unemployment in Ceredigion is not evenly distributed by age. The county has a high proportion of young unemployment between 16 and 24 and lower proportion of unemployment in the 25-34 age group. Unemployment within the 45-54 band is significantly higher than the Wales and UK proportions.

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**Table 8: Unemployment by age group: Claimant Count February 2000 (%)**

	16-24	25-34	35-44	45-54	55+
Ceredigion	26.5	24.1	20.1	21.0	8.2
Wales	28.4	27.4	19.5	17.2	7.5
UK	25.3	28.4	19.1	17.3	8.2

Source: ONS

### 1.5. Self employment

11,000 people are self-employed in Ceredigion giving a self-employment rate of 33.5% in 1998. This rate is amongst the highest rate nationally comparing to national average rate of 12.7%. This high percentage is accounted for by a large number of small farmers, around 2,500 full time principal farmers and a further 1,250 part time farmers. Ceredigion has experienced an increase in the numbers that are self-employed, an increase of 34% between 1981 and 1991 for example. Since farm employment levels have remained the same or fallen slightly during this period, the rise must be growth in non-agricultural sectors. Since the self-employed are predominantly in agriculture and personal services, they are among the lower range of self-employed earnings.

**Table 9a: Employers and self-employed, 1998**

	Employees	Self-employed
Ceredigion	66.5	33.5
Wales	87.3	12.7

Source: Labour Force Survey (1998)

**Table 9b: Employees and self-employed, 1991**

	Employees	Self-employed
Ceredigion	68.4	31.6
Mid and West Wales	71.3	28.7
GB	87.1	12.9

Source : 1991 Population Census

### 1.6. Industrial Structure

The proportion of very small units as classified by employment size is much greater in Ceredigion than any other rural Objective 1 area. In 1998 87% of units in Ceredigion were employers of less than 9 people. The remainder, 13%, were categorised as units employing between 10 and 99 people. No units employed more than 99 employees.

**Table 10: Proportion of units by employment size bands, April 1998**

	0-9	10-19	20-49	50-99	100-199	200-499	500-999	1000+
Isle of Anglesey	77	8	4	4	4	0	0	0
Conwy	77	15	5	3	0	0	0	0
Denbighshire	68	15	8	3	3	3	0	0
Gwynedd	76	11	6	4	2	2	0	0
Pembrokeshire	80	11	4	0	2	2	0	0
Carmarthenshire	72	14	9	3	3	1	0	0
<b>Ceredigion</b>	<b>87</b>	<b>5</b>	<b>5</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Wales</b>	<b>66</b>	<b>13</b>	<b>10</b>	<b>4</b>	<b>4</b>	<b>2</b>	<b>1</b>	<b>0</b>

Source: Office for National Statistics

### **1.7. Employment Structure**

The main issues for Ceredigion in terms of employment by occupation are:

- Ceredigion has a well above average rate of managers and administrators compared to the Wales average and other bordering rural Objective 1 areas. Professional occupants shows the same pattern, but on a smaller scale.
- Ceredigion is under-represented by plant and machine operators when compared to the Wales average and under-represented within personal and professional services when compared to other bordering areas.
- Both of these factors are in part due to the under representation of the manufacturing sector.

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**Table 11: 1991 Employment by Occupation (based upon a 10% sample)**

	Gwynedd	Carmarthen	Pembs	Ceredigion	Wales
Managers and Administrators	18.3	19.0	20.0	<b>23.5</b>	<b>15.2</b>
Professional	8.6	7.3	7.2	<b>10.4</b>	<b>8.1</b>
Assoc Prof Tech	7.7	7.2	6.6	<b>7.6</b>	<b>7.9</b>
Clerical and Sec	10.9	11.8	10.6	<b>10.7</b>	<b>13.8</b>
Crafts & Related	15.3	14.8	15.8	<b>14.2</b>	<b>14.8</b>
Personal & Prof Services	11.2	9.5	12.4	<b>8.6</b>	<b>9.7</b>
Sales	6.6	6.7	7.1	<b>6.1</b>	<b>7.3</b>
Plant & Machine Operators	8.5	12.0	8.3	<b>6.3</b>	<b>12.3</b>
Other Occupation	11.4	10.6	10.6	<b>10.8</b>	<b>9.8</b>
Not stated	1.4	1.2	1.5	<b>1.8</b>	<b>1.1</b>
Total	98.4	98.8	98.5	<b>98.2</b>	<b>98.9</b>

Source: 1991 Population Census; NOMIS

### **1.8. Education and Skills**

Ceredigion performs well as a county in terms of achievement of qualifications at school level compared to Wales as a whole. For example, 58% of relevant pupils in Mid Wales gained at least 5 GCSE grade A-C passes in 1997 compared to only 44% for Wales as a whole. Similarly, 70% of relevant pupils gained 2 or more A levels at grade A-C compared to 55% for Wales.

This successful educational performance does not necessarily transform into low skills shortages however. The Employers Survey from Future Skills Wales indicated that North Ceredigion has a great problem with hard to fill vacancies, with 34% of companies reporting difficulties in recruitment. North Ceredigion also reported high skills gaps, with 23% of employers reporting skill gaps compared to 8% for south Ceredigion, 16% for Mid Wales and 18% for Wales.

### **1.9. Inward Investment**

Ceredigion has performed poorly in attracting and securing its share of inward investment. Although it has attracted a significant share of projects the county has secured only 0.5% of the employment generated by overseas-owned plants in Wales. This is the lowest proportion for all rural Objective 1 areas in 1996. The low share of jobs being generated suggests that each project has been small in scale.

**Table 12: Employment in overseas-owned manufacturing plants 1996**

	Plants	Employees	Percentage of total overseas owned plants in Wales
Isle of Anglesey	5	750	1.0
Gwynedd	3	700	0.9
Conwy	2	450	0.6
Denbighshire	9	1800	2.4
Pembrokeshire	5	1250	1.7
Carmarthenshire	13	2800	3.7
<b>Ceredigion</b>	<b>6</b>	<b>350</b>	<b>0.5</b>
Wales	381	75450	100.0

Source: Welsh Register of Manufacturing Employment

### **1.10. Deprivation**

When considering socio-economic characteristics an important first step is to put Ceredigion into a national Welsh context. We have done this by using indicators derived from 1991 Census data. The National Assembly's *Index of Socio-Economic Conditions* provides a ward-by-ward analysis based on unemployment, the level of economic inactivity, social class, population loss in the 20-59 age group, permanent sickness, overcrowding, housing conditions and mortality. Based on these eight factors, Ceredigion fares well on deprivation levels on a national context, with only two wards being ranked among the worst 100 deprived wards in Wales. The worst two wards (Aberystwyth North and West) are skewed by the high concentration of students living in shared accommodation with basic housing amenities. Only two wards in the whole of Ceredigion (Llandyfriog and Llangybi) have above average rates of unemployment, and two wards (Aberystwyth West and Llandyfriog) have well above average rates of low socio-economic groups in the population. The Index does not account for hidden deprivation such as rural deprivation, and care should be taken when interpreting this Index.

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**Table 13: Index of Socio-Economic Conditions : Applied to Wards in Ceredigion**

	Unemployment	Low economically active popn	Low socio-economic groups in the population	Population loss in the 20-59 years age group	Numbers perm sick in the popn	Overcrowding in housing	Level of basic housing amenities	Standard Mortality Rate	Wales Rank	Rank
Aberystwyth North		**				**	**	**	21	1
Aberystwyth West		**				**	**		70	2
Capel Dewi		*	*	*	*	**	**	**	197	3
Llanarth		*	*	*		*	*	*	308	4
Llandysul Town			*	*		*	*	*	355	5
Llanfihangel Ystrad			*	*		**	*		363	6
Lledrod			*			*	**		367	7
Llandyfriog	*	**	*						376	8
Llangybi	*	*					*	*	400	9
Aberystwyth East									421	10

Source: Welsh Office

\* Denotes that the criteria is above the national average

\*\* Denotes that the criteria is well above the national average

### **1.11. Average Wage and Income Levels**

Hourly earnings in Ceredigion are significantly lower than the Welsh averages, both for men and women. Full-time male figures compares favourably with other rural Objective 1 areas, but full-time female earning, at £5.57, are amongst the worst. When assessing household incomes, 29% of households in Ceredigion have incomes of less than £10,000. This is a lower proportion than the Welsh average.

**Table 14: Estimated Hourly Earnings, 1996 (£)**

	Full-time males	Full-time females
Anglesey	7.22	6.22
Carmarthenshire	7.76	5.63
<b>Ceredigion</b>	<b>7.71</b>	<b>5.57</b>
Gwynedd	7.37	6.5
Pembrokeshire	7.32	5.47
Wales	8.13	6.59

Source: University of Wales, Swansea

**Table 15: Household incomes less than £10,000**

	% of households with incomes of less than £10,000 1997
Carmarthenshire	40
Gwynedd	40
Anglesey	33
<b>Ceredigion</b>	<b>29</b>
Pembrokeshire	29
Wales	34

Source: 1997 Welsh Household Interview Survey and Welsh Housing Statistics, 1998

The main reasons that can be used to explain the low wages in Ceredigion are:

- Agricultural employment is important in Ceredigion and agricultural wages are generally low.
- Tourism is an important sector in the county; again a sector that suffers low-pay and part-time working is common, especially amongst women.
- Alternative employment opportunities are few and are geographically distant. The labour market can be described as a closed market with low mobility, and consequently less change for market forces to force competitive wage rates.

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### 1.12. GDP Gap

The most commonly used measure of economic prosperity is that of GDP. It is defined as the sum total of all goods and services produced by an economy over a specified period.

Estimations put GDP per head in Ceredigion at only 77.3% of the UK level. Although this figure is well below the Wales figure of 81%, it is higher than the majority of other areas in West Wales and the Valleys.

**Table 16: Gross Domestic Product by Unitary Authority in Wales and comparisons to Wales and EU averages**

Area	GDP estimate Average EU 15 = 100
Anglesey	73.0
Gwynedd	74.2
Conwy	79.1
Denbighshire	81.8
Flintshire	101.5
Wrexham	84.5
Powys	78.5
<b>Ceredigion</b>	<b>77.3</b>
Pembrokeshire	63.4
Carmarthenshire	64.3
Swansea	78.5
Neath Port Talbot	76.3
Vale of Glamorgan	104.4
Cardiff	110.9
Bridgend	66.2
Rhondda Cynon Taff	64.5
Merthyr Tydfil	58.4
Caerphilly	72.2
Blaenau Gwent	75.4
Torfaen	86.8
Monmouthshire	87.5
Newport	86.0
<b>West Wales and the Valleys</b>	<b>72.76</b>
<b>Wales</b>	<b>81.0</b>
<b>EU 15</b>	<b>100</b>

The most widely used indicator of relative economic performance at a regional or local level is real Gross Domestic Product per capita. This is annual GDP divided by an index of the average price of goods and services purchased (to adjust for inflation – hence the term real) and by the total population of the county (hence the term ‘per capita’.) Economic growth is concerned with the growth of real GDP per capita.

To understand what has happened in the last twenty years it is useful; to express GDP as the product of four contributing factors:

- Labour productivity, or the ration between real GDP and total employment (average output per person employed)
- The employment rate, or the percentage of the labour force which is actually employed. The ratio is the exact complement of the unemployment rate (i.e. the percentage which wants a job, but does not have one). For example if the employment rate is 91%, the unemployment rate is 9%
- The economic activity rate, or the percentage of the population aged 16-59/64 which is in the labour force (i.e. the sum of the employed, the unemployed and those on training schemes).
- The working-age ratio, or the percentage of the total population which is aged 15-59/64.

The difference in per capital GDP rates for Ceredigion and the UK as a whole can be seen as a combination of a range of different factors. GDP per capital can be expressed by the following equation:

$$GDP\ per\ capita = employment\ rate \times economic\ activity\ rate \times productivity\ rate \times working\ age\ ratio$$

As can be seen from Table 17 Ceredigion under-performs vis-à-vis the UK economy on all four measures expect for employment rate.

**Table 17: Components of per capital GDP, Ceredigion and UK 1997**

	Employment Rate	Economic Activity Rate	Working Age Ratio	Productivity Rate	GDP per capita
Ceredigion	95.8	76.6	60.7	£16,603	£7,396
UK	93.75	77.7	61.4	£20,0033.9	£8,960

To assess the contribution of each of the four component factors to the GDP gap we can equalise each ratio in turn to the UK average while keeping all other factors constant, and then calculate the effect on per capital GDP. Table 18 shows the results for each of the four factors:

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**Table 18: GDP Drivers for Ceredigion, 1997**

	GDP per capita	% UK average	% Reduction in GDP gap
All factors Constant	£7,396	82.5	/
Employment Rate equalised	£7,237	80.8	82.5
Economic Activity Rate equalised	£7,502	83.7	80.8
Working Age Ratio equalised	£7,481	83.5	83.5
Productivity Rate equalised	£8,924	99.6	96.6

Source: Derived from Table 17

It is clear from the above that the single largest contributory factor to lower per capita GDP in Ceredigion is the lower average productivity of those in employment. However, the lower economic activity rates and the older age structure of the population are also contributory factors.

Prospects for activity-based GDP gains are low in Ceredigion. Economic activity rates initially increase with age and then decline (an inverted U-shape relationship). With the birth rate now stabilised, the benefits of a growing working-age ratio are gone. The female economic activity rate should continue to grow, but at a slower pace, as it converges to an equilibrium level. Therefore overall we would expect that over the next decade activity rates will decline as the demographic weight of the older inactive population begins to increase.

Worldwide productivity rates have slowed down since 1973 due to a number of factors including growing skills mismatch, decline in unionisation, environmental costs, and the end of a long-wave of the electronics revolution. Recent productivity gains have been attributed to the increased investment in information technology and evidence suggests a strong correlation between productivity and investment in R&D, infrastructure and human capital.

### 1.13. Economic Sectors

Agriculture accounts for nearly half of the VAT based enterprises within Ceredigion followed by wholesale and retail at 17.5% in 1999. The proportion for agriculture is double that of Wales. Hotels and Restaurants only account for 6.4% of VAT based enterprises, a lower proportion than would be expected due to the high proportion of businesses that are not VAT registered within the county.

When assessing the type and changes of VAT based enterprises within Ceredigion between 1997 and 1999 the following issues emerge:

- Ceredigion has experienced decreases in the number of agriculture and hotels and restaurants enterprises, with slight decreases within construction, and wholesale and retail VAT based enterprises. The number of VAT based enterprises within transport and communication, production and other services have experienced an increase.
- These trends have generally been in line with national trends. Exceptions are production-based enterprises, which have increased against national trends. Wholesale and retail enterprises have experienced a much smaller decrease than national levels. The number of hotel and restaurant enterprises have experienced a much smaller contraction than that at national level. A small increase in the Transport and communication sector has also gone against Welsh trends.

**Table 19: 1997 VAT Based enterprises by industry**

	Ceredigion		Wales	
	Total	%	Total	%
Agriculture	1,775	48.0	17,780	23.6
Production	175	4.7	5885	7.8
Construction	330	8.9	7805	11.5
Wholesale and Retail	660	17.9	18,165	24.1
Hotels and Restaurants	280	7.6	6475	8.6
Transport and Communication	70	1.9	3275	4.3
Other services	410	11.1	15140	20.1
Check	5	100.1	0	100.0

Source: NOMIS

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**Table 20: 1999 VAT based enterprises by industry**

	Ceredigion		Wales	
	Total	%	Total	%
Agriculture	1,680	47.5	16,825	23.3
Production	175	4.9	5,600	7.8
Construction	305	8.6	8,000	11.1
Wholesale and Retail	620	17.5	16,990	19.4
Hotels and Restaurants	225	6.4	6,320	8.7
Transport and Communication	75	2.1	2,946	4.1
Other services	425	12.0	15,315	21.2
Check	35	100.0	244	100.0

Source: NOMIS

A location quotient is a comparative measure of the specialisation of a sector between a local area and a larger region (It is calculated by measuring the total percentage level of local employment in a sector, divided by the same ratio for Wales). A location quotient of 1 or above reveals a specialised sector within the county and a location quotient below 1 denotes an unspecialised sector within the county. Calculating the location quotient for VAT based enterprises in Ceredigion and Wales reveals the following situation.

Agriculture emerges as having the largest location quotient within Ceredigion. The fact that this figure of 2.03 remains constant between 1997 and 1999 demonstrates that the significance of agricultural VAT based enterprises has remained constant over time in relation to Wales. All other sectors have location quotients below 1, yet wholesale and retail and transport and communication appear as increasing but low specialised sectors. The only sector to be showing signs of a decrease in terms of VAT based enterprises is the hotel and restaurant sector.

**Table 21: VAT based enterprises location quotient for Ceredigion to Wales**

Sector	1997	1999	Location Classification
Agriculture	2.03	2.03	High specialisation
Production	0.60	0.63	Low specialisation
Construction	0.77	0.77	Low specialisation
Wholesale and Retail	0.73	0.90	Increasing low specialisation
Hotels and Restaurants	0.88	0.74	Decreasing low specialisation
Transport and Communication	0.44	0.51	Increasing low specialisation
Other services	0.55	0.57	Increasing low specialisation

Ceredigion emerges as a fairly static county in terms of stock registrations and deregistration. As a proportion of total stock in 1997, new registrations account for 5.4% and deregistration at 5.6%. This compares to a percentage of 8.3% for national registrations and deregistration.

**Table 22: Company Performance for VAT based enterprises**

	Stock	Registrations	Deregistrations	Registrations as % of stock	Deregistrations as % of stock
Anglesey	2,115	135	140	6.4%	6.6%
Carmarthenshire	6,690	400	405	6.0%	6.1%
<b>Ceredigion</b>	<b>3,695</b>	<b>200</b>	<b>210</b>	<b>5.4%</b>	<b>5.6%</b>
Conwy	3,315	220	275	6.6%	8.3%
Denbighshire	2,890	245	285	8.5%	9.9%
Gwynedd	4,540	255	325	5.0%	7.2%
Pembrokeshire	4,745	330	340	7.0%	7.2%
Wales	75,415	6,240	6,320	8.3%	8.3%

Source: NOMIS

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#### **1.14. Employment by Industry**

Ceredigion has a greater proportion of people employed in the primary industries of agriculture, forestry and fishing than the national average. Within the primary sector, farming is the most important sector in terms of employment and its contribution to the local economy. Employment in agriculture is twice the Wales average and four times the GB average.

The local economy is more dependent upon the service industries than is the case nationally, with tourism and the higher education institutions playing a particularly important role. 35% of employment is in public services such as administration, education and health. The two universities, Aberystwyth and Lampeter, the National Library for Wales, DERA Aberporth, IGER, Bronglais Hospital and Ceredigion County Council are the largest employers. Employment in Ceredigion in 1997 is concentrated in other services (mainly public such as education and health) followed by distribution, hotels and catering. These two sectors account for 65% of the employment in Ceredigion in 1997, compared to 57% on a Wales level.

The significance of manufacturing industries is below the national average, with the metal goods and engineering sector hardly contributing to the local employment.

The greatest increases up to 2007 in Ceredigion are predicted to be within two sectors: distribution, hotels and catering sector at a rate of 2.2% and engineering at a rate of 1.1%. The greatest decreases in employment between 1997 and 2007 are predicted to be within the metals, minerals and chemicals sector followed by the mining and utilities sector. These predictions in employment decreases reflect the national predictions. However, predictions on employment growth sectors differs slightly on a national scale, with financial and business services growing at 1.6% compared to 0.0% per year and the distribution, hotels and catering sector growing at a slower pace of 1.4% compared to the Ceredigion rate of 2.2% per year. Employment growth in engineering, construction and other services are likely to be slower in Ceredigion between 1997 and 2007 compared to 1991-7.

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**Table 23: Employment in Ceredigion Levels '000**

Sector	1991	1997	2007	Average annual change	
				1991-7	97-07
Agriculture	1.6	1.5	1.1	-3.5%	-2.8%
Mining and Utilities	0.3	0.2	0.1	-6.0%	-5.4%
Metals, Minerals and Chemicals	0.1	0.1	0.1	-1.9%	-7.5%
Engineering	0.0	0.1	0.1	70.6%	<b>1.1%</b>
Other Manufacturing	1.3	1.6	1.6	4.3%	-0.4%
Construction	0.6	0.9	1.0	8.0%	1.0%
Distribution, Hotels and Catering	4.9	5.0	6.2	0.2%	<b>2.2%</b>
Transport and Communications	0.7	0.6	0.6	-1.7%	-0.3%
Financial & Business Services	2.6	1.9	1.9	-4.8%	0.0%
Other (Mainly Public) Services	7.3	8.1	9.0	1.7%	1.0%
<b>Total Employees</b>	<b>19.6</b>	<b>20.1</b>	<b>21.6</b>	<b>0.4%</b>	<b>0.8%</b>

Source: Business Strategies Limited, 1998

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**Table 24: Employment share (%) in Ceredigion 1991 - 2007**

Sector	1991	1997	2007
Agriculture	8.2%	7.5%	5.1%
Mining and Utilities	1.5%	1.0%	0.5%
Metals, Minerals and Chemicals	0.5%	0.5%	0.5%
Engineering	0.0%	0.5%	0.5%
Other Manufacturing	6.6%	8.0%	7.4%
Construction	3.0%	4.5%	4.6%
Distribution, Hotels and Catering	25.0%	24.9%	28.7%
Transport and Communications	3.6%	3.0%	2.8%
Financial & Business Services	13.3%	9.5%	8.8%
Other (Mainly Public) Services	37.2%	40.3%	41.7%
Total Employees	100.0%	100.0%	100.0%

Source: Business Strategies Limited, 1998

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**Table 25: Employment in Wales Levels '000**

Sector	1991	1997	2007	Average annual change	
				1991-7	97-07
Agriculture	20.0	18.1	13.8	-1.6	-2.6
Mining and Utilities	17.0	8.9	4.4	-10.2	-6.8
Metals, Minerals and Chemicals	66.0	57.3	38.0	-2.3	-4.0
Engineering	63.2	71.7	73.5	2.1	0.2
Other Manufacturing	75.9	82.8	86.9	1.5	0.5
Construction	44.1	40.4	36.9	-1.4	-0.9
Distribution, Hotels and Catering	201.9	204.9	234.6	0.2	1.4
Transport and Communications	48.5	43.4	39.2	-1.9	-1.0
Financial & Business Services	97.8	97.1	113.4	-0.1	1.6
Other (Mainly Public) Services	323.0	346.3	388.4	1.2	1.2
Total Employees	957.4	972.0	1028.3	0.2	0.6

Source: Business Strategies Limited, 1998

**Table 26: Employment share (%) in Wales 1991-2007**

Sector	1991	1997	2007
Agriculture	2.1%	1.9%	1.3%
Mining and Utilities	1.8%	0.9%	0.4%
Metals, Minerals and Chemicals	6.9%	5.9%	3.7%
Engineering	6.6%	7.4%	7.1%
Other Manufacturing	7.9%	8.5%	8.5%
Construction	4.6%	4.2%	3.6%
Distribution, Hotels and Catering	21.1%	21.1%	22.8%
Transport and Communications	5.1%	4.5%	3.8%
Financial & Business Services	10.2%	10.0%	11.0%
Other (Mainly Public) Services	33.7%	35.6%	37.8%
Total Employees	100.0%	100.0%	100.0%

Source: Business Strategies Limited, 1998

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Calculating the location quotient for employment by industry reveals an interesting pattern.

- Ceredigion has five specialised sectors and five unspecialised sectors when applying the location quotient to employment sectors
- Only one sector (financial and business services) is predicted to decrease in specialisation, thus presenting a threat to Ceredigion.
- Increasing low specialised sectors signify sector opportunities. They are metals, minerals and chemicals, engineering, and transport and communication.
- Agriculture and other services appear as constant highly specialised sectors that are not showing signs of decreasing as employment sectors.

**Table 27: Employment Location Quotient for Ceredigion relative to Wales**

Sector	1991	1997	2007	% change	Classification of sector
Agriculture	3.90	3.95	3.92	+ 0.5+	High specialisation
Mining and Utilities	0.83	1.11	1.25	+33.6+	Increasing high specialisation
Metals, Minerals and Chemicals	0.07	0.08	0.14	+50%	Increasing low specialisation
Engineering	0.0	0.07	0.07	+100%	Increasing low specialisation
Other Manufacturing	0.84	0.94	0.87	+3.4%	Low specialisation
Construction	0.65	1.07	1.28	+49.2%	Increasing high specialisation
Distribution, Hotels and Catering	1.18	1.18	1.26	+6.3%	Increasing high specialisation
Transport and Communications	0.71	0.67	0.74	+4.0%	Increasing low specialisation
Financial & Business Services	1.30	0.95	0.80	-62.5%	Decreasing low specialisation
Other (Mainly Public) Services	1.10	1.13	1.10	0.0%	Constant high specialisation

### 1.15. Productivity by Industry

Ceredigion is not regarded as a high-performing region. The predominance of small businesses and service sector activity, has led to an overall level of productivity for Ceredigion that is 2.6% below Mid Wales and 14.7% below that for all-Wales.

Poor performing sectors for 1997 are distribution, hotels and catering, engineering and agriculture. These figures do not include self-employment figures, and would result in much lower productivity rates for agriculture and hotels and catering, in particular, if they were taken into consideration.

Productivity figures show that three sectors perform well when compared to both Mid Wales and Wales: Financial and business services; Transport and communication and Other (mainly public) services.

When comparing with Mid Wales and Wales, poor performing sectors in terms of productivity are: Engineering; Agriculture and Mining and utilities.

**Table 28: Productivity in Ceredigion, Mid Wales and Wales, 1997 (£)**

Sector	Ceredigion	Mid Wales	Ceredigion - Mid Wales % Difference	Ceredigion	Wales	Ceredigion - Wales % Difference	Mid Wales - Wales % Difference
Agriculture	18,000	21,860.0	-17.7	18,000	20,663.0	-12.9	5.8
Mining and Utilities	81,500	87,166.7	- 6.5	81,500	91,786.5	-11.2	-5.0
Metals, Minerals & Chemicals	50,000	42,428.6	17.8	50,000	50,698.1	-1.4	-16.3
Engineering	13,000	25,025.0	- 48.1	13,000	27,488.1	-52.7	-9.0
Other Manufacturing	21,500	21,482.1	0.1	21,500	22,698.1	-5.3	-5.4
Construction	41,000	42,625.0	- 3.8	41,000	37,576.7	9.1	13.4
Distribution, Hotels & Catering	13,320	14,354.0	- 7.2	13,320	13,352.9	-0.2	7.5
Transport & Communications	41,500	38,520.0	7.7	41,500	37,536.9	10.6	2.6
Financial & Business Services	31,420	29,580.0	6.2	31,420	27,287.3	15.1	8.4
Other (Mainly Public) Services	16,272	15,885.0	2.4	16,272	15,273.5	6.5	4.0
Average Productivity (based on GDP after adjustments)	16,603	17,050.0	- 2.6	16,603	19,461.4	-14.7	-12.4

Source: Derived from data supplied by Business Strategies Limited

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Calculations on predicted productivity growth for Ceredigion highlights the following trends:

- Metals, minerals and chemicals is the only sector predicted to experience a productivity decline (28% between 1997 and 2007), compared to an all-Wales productivity growth of 41.5%.
- The lowest productivity growth is likely to be experienced within distribution, hotels and catering, manufacturing and other services.
- The highest productivity difference is predicted to take place at 58% within the mining and utilities sector, a rate higher than the national rate of 52.9%. This is followed by a 43% productivity difference within the engineering sector in Ceredigion compared to 35.1% on a national scale.

**Table 29: Predicted Productivity Growth, Ceredigion and Wales, 1997 - 2007 (£)**

Sector	Ceredigion			Wales		
	1997 Productivity	2007 Productivity	97-07 productivity difference (%)	1997 Productivity	2007 Productivity	97-07 Productivity difference
Agriculture	18,000	27,000	33%	20,663.0	30,637.7	32.6%
Mining and Utilities	81,500	192,000	58%	91,786.5	194,681.8	52.9%
Metals, Minerals & Chemicals	50,000	39,000	<b>-28%</b>	50,698.1	86,734.2	<b>41.5%</b>
Engineering	13,000	23,000	43%	27,488.1	42,359.2	35.1%
Other Manufacturing	21,500	22,900	6%	22,698.1	25,420.0	10.7%
Construction	41,000	51,800	21%	37,576.7	48,228.2	22.1%
Distribution, Hotels & Catering	13,320	12,900	<b>3%</b>	13,352.9	14,710.6	<b>9.2%</b>
Transport & Communications	41,500	54,800	24%	37,536.9	51,818.8	27.6%
Financial & Business Services	31,420	37,500	<b>16%</b>	27,287.3	31,035.3	<b>12.1%</b>
Other (Mainly Public) Services	16,272	17,900	<b>9%</b>	15,273.5	16,562.0	<b>7.8%</b>
Average Productivity (based on GDP after adjustments)	16,603	19,100	13%	19,461.4	23,021.5	15.5%

Source: Derived from data supplied by Business Strategies Limited, 1998

## **Appendix 3: LOCAL CONSULTATIONS**

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The Objective 1 Forum have undertaken local consultations and welcomed written responses to priorities and developments within the county. An analysis of the written responses, 90 in total, identifies the needs and priorities amongst the local community with regards to Objective 1 funding and expenditure. The responses vary in terms of breadth of concerns and issues and suggestions for projects. Whilst the majority of responses foresee Objective 1 as a real opportunity for Ceredigion to overcome numerous problems a few expressed concerns over the fact that the underlying target of increasing GDP would be achieved at the expense of the strengths in Ceredigion, such as the natural environment and rural communities.

An analysis of the written local consultations, reveal six important sectors or themes that groups or individuals commented upon. The percentages in brackets denote the proportion of responses that have drawn attention to these themes. They are:

### **1. Rural/Green and Cultural Tourism (40%)**

- Develop high quality tourism using the natural resources of rurality such as walking and cycling holidays
- Develop and promote cultural tourism within Ceredigion
- 14% of respondents noted the need to develop TICs in all town centres
- Develop the Teifi estuary
- Improve recreation facilities for local people and visitors
- Improve public rights of way
- Sustainable management of the coast and countryside

### **2. Strengthening rural communities (38%)**

- Social inclusion of particular groups (young people, women, disadvantaged, elderly people, disabled)
- Particular focus on young people – suggestions for drop-in centres (8%)
- Ideas for community projects (17%) e.g. community-resource centres, local training provision, multi-agency advice centres
- Health related developments including childcare, health care and fitness
- Improve community services in rural areas (shops, post offices, garages etc)
- Build upon the social economy and the strengths of the volunteering sector

### **3. Improvements to Infrastructure (26%)**

- Road improvements to and within Ceredigion
- Improve public transport provision (rail and buses) especially to rural villages
- Explore possibilities of developing an air-base at Aberporth
- Business infrastructure such as provision of appropriate buildings/sites
- Good quality appropriate housing

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#### **4. Education and Learning (24%)**

- Train workforce in new skills (21%)
- Increase training facilities and provision (22%)
- Improve business skills
- Improve access to learning opportunities for excluded groups

#### **5. ITC developments in general (24%)**

- Develop ICT infrastructure and tackle issues of access to ICT
- Develop IT centres wherever convenient
- Tackle issues relating to training for all groups within communities

#### **6. Provide good employment projects (22%)**

- Improve access to better employment opportunities
- Develop E-Commerce and Internet industry to provide high skills jobs
- Address needs of particular groups such as women and young people

In addition to these six main themes it is worth noting the attention given to particular opportunities within certain sectors. Tourism has been included as a major category above, but other sector that appeared prominent within the consultations are:

- Education and knowledge based industries
- Agriculture
- Forestry and Woodland
- Renewable Energy and Resources
- Cultural and Media based sectors

An important point to bear in mind when analysing the responses is the lack of responses from the private sector, which has been reflected in the lack of attention given to the business infrastructure and business support issues in general. The majority of responses have come from voluntary or community based initiatives representing a cross-section of interests and fields.

**Appendix 4: Notes from Ciliau Aeron Workshop 6 March 2000**

**Workshop 1 - Prioritising the main issues and problems and setting future targets for Ceredigion within a SOWT analysis**

Characteristic	SWOT Classification
Low male activity rate	Weakness: indicates shortage of 'real' jobs
Low GDP	Opportunity – for improvement!
Low inward investment rates	Weakness representing failure to diversify the economy and introduce new skills
High young and short-term unemployment	Weakness – too many young people competing for jobs that exist: large student population also seeking part-time work – poor career opportunities for indigenous young people, whether able/qualified or not
Deprivation mainly identified by overcrowding and poor housing amenities	Strength for Ceredigion in that deprivation has not led to widespread social breakdown and disaffection; weakness in that strong cultural overlays could be masking an incipient problem; opportunity in that quality of life is seen to be good, giving scope for retention of young people and the attraction of essential expertise to the area; threat, in that new definitions of deprivation better based on rural experience (e.g. discounting car ownership, etc) could move Ceredigion up the table and also threat in respect that low perceived deprivation can engender complacency and low priority for external support.
Low hourly earnings and wages for men and women	Weakness, exacerbated by high levels of youth (school pupil) employment, especially in tourism.
High levels of part-time work	Seen as strength in enabling high level of female employment and addition to family incomes (however, not so much of an asset when viewed against low level of full-time employment opportunities).
Low level of plant and machine operators and personal and professional services	Viewed by panel with great equanimity but probing produced admission of weakness in terms of diversified economy and industrial-type skills.
Overall low productivity rates	Weakness and threat (drive for higher productivity will cost jobs which the present local economy cannot replace).
Low presence and contribution of manufacturing	Weakness, although not regarded as particularly serious in view of the difficulties of the manufacturing sector generally and the problem of being over-dependent on it as in industrial south Wales. There was a distinct impression that the type of person and organisation represented at the conference didn't really want things like manufacturing in a 'rural idyll' living environment although there was a grudging admission that manufacturing environments generated more opportunities for spin-off new firms in services, distribution and sub-contract supply as well as encouraging business start-ups from management buy-outs and employee initiative.

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High employment in public sector services	Weakness (and threat, in that many of these jobs are dependent on political decisions which may be taken outside the local authority area – e.g. DERA, Inland Revenue, national Library, Welsh Book Council, University, IGER, etc).
High dependence on low productive sectors	Weakness and threat as most of these sectors are due for enforced productivity improvements in the near future.
High positive population change resulting from migration	Strength in that population levels are maintained, local services supported and useful skills injected into the local economy. Weakness in that it masks out-migration of indigenous young people. Opportunity in that it demonstrates attractiveness of the area to incomers with appropriate skills, Threat in that there is high incidence of inward migration of older people, requiring higher levels of health and social support, often averse to changes which would be necessary to improve economic prospects and also frequently impacting adversely on indigenous culture and maintaining high house prices restricting indigenous opportunities for purchase.
Higher activity rate	Weakness, again inviting complacency, and threat in that high activity rates are in unproductive sectors.
Low unemployment rates	Strength in short term but weakness for medium term as there is no pool of trained labour for new enterprises.
Low long-term unemployment rates	Strength – reduces social exclusion problems – but may mask hidden unemployment and lack of real employment prospects.
Low deprivation levels as measure in the Socio-Economic Index	Strength – see deprivation above.
High self-employment rate	Strength at present but weakness and threat for medium to long term because of fragility of agriculture sector. Worth noting that agriculture sector does not presently represent the usual virtues of self-employed sectors because it is focused on production and has lost capacity to market effectively and grow business to generate new employment.
High level of managerial and administrative employment	Weakness. High dependence on public sector for these jobs and poor availability of career paths towards the jobs for indigenous young people.
Two universities	Strength in sustaining high levels of good quality jobs, although these are heavily dependent on in-migration. Weakness in distorting demography by high concentrations of young people, often competing for part-time and seasonal employment within the local economy. Opportunity in that they could be a source of new knowledge and technology (including biotech) based industries and support for enterprise and entrepreneurship education among the existing business community. Threat in that jobs are dependent on UK higher education strategies and both universities are more traditionally

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	academic than most, with less relevance to local economic and administrative requirements.
Antur Teifi	Experience of bottom up development and opportunity for hitting the ground running with programmes.
Theatr Felinfach	Strength – also includes Theatr Mwldan, Aberteifi, and Aber Arts, Aberystwyth – creating vibrant cultural scene and opportunities for supporting economic development, particularly in tourism.
High academic school achievements	Weakness in that education is perceived as a route out of the county rather than preparation for a productive lifetime within it. Opportunity in that schools and colleges are demonstrably effective and have high degree of parental support. Threat in that some of the present excellence is attributable to a large pool of children of academics, generally incomers, who may not share vision of more practical education.
Bilingualism	Generally seen as a strength, maintaining robust culture and community spirit.
High productivity within transport, communication and financial and business services	Seen as strength in that most of job reductions have already taken place. Now represent opportunities for expansion.
High self-employment and micro companies	See self-employment above. Micro companies seen as strength in developing high activity rates but a weakness in that many are dependent on lifestyle choices of incomers and do not have the necessary ambition and drive to expand. Opportunity in that the encouragement of networks and co-operative action could lead to more effective units.
Hidden deprivation in rural context	Threat of becoming more overt.
Dominance of Aberystwyth in rural region – skews figures	Opportunity on top of more obvious weakness and threat, in that Aber has critical mass to develop the economy of its hinterland.
High dependence on very small employment units	See micro companies above.
Self-employment rates dominated by farming sector	See self-employment above.
Large proportion employed in primary industries	Weakness in terms of diversification at present but many opportunities for development of added value in these sectors.
Agricultural output decreased 91-97	Opportunity for exploring more lucrative agricultural niches – e.g. organic.
High geographical variation of unemployment	Weakness - structural.
Slower employment growth in engineering, construction and other services	Predictions largely irrelevant to Ceredigion because of relative unimportance of these sectors to the local economy.
Financial and business services decline in employment terms	Threat in view of still substantial proportion in these sectors but likelihood is that decline has already hit Ceredigion as much as it will because of concentration of

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	employment in branch banking. Indigenous wealth and need for more congenial financial support for business provides opportunity (e.g. Banc y Cardi) and good quality education and Business School at Aber provide opportunities for expansion in these sectors.
Predicted productivity declines in metals, minerals and chemicals	Largely irrelevant.
High growth in population	Opportunity for new business development.
Predicted employment growth in distribution, hotels and catering	Weakness and threat - tourism in Ceredigion is not equipped to counter growth in these sectors elsewhere in the UK and abroad.
Opportunities for increased specialisation in metals, minerals and chemicals and engineering	Threat. Ceredigion is not well placed to take advantage of these opportunities and such as exist within the county are likely to be developed from outside.
Predicted productivity growth in mining, utilities, transport and communications	Threat. Relevance to Ceredigion largely in utilities sector where further job shedding (Hyder, Manweb) is inevitable.
Opportunities for adding value to local produce	Opportunity – but also threat because every other part of rural Wales will be targeting this sector.
Increasing growth in cultural, tourism, and leisure activities	Opportunity – but increasing globalisation of tourism and culture mean that Ceredigion will need to seek niche markets.

## **Appendix 4**

### **Workshop 2 - Identifying key themes and economic sectors for development.**

#### **Themes in vision of Ceredigion rural community 2010:**

##### **Group 1**

Focus on the six market towns in Ceredigion for developing community and market focuses:

1. Community focus: Every market town should have a community focus that will include:
  - Self-sustaining local services such as garages, shops, post offices that would act a the hub of communities;
  - IT infrastructure that is accessible to every member of the community;
  - A vibrant community with a variety of ages and is wealthy in terms of culture and social amenities.
  
2. Niche market: each market town has originally been developed as an agricultural market town. New purposes and identities need to be identified and developed for these market towns. Examples include organic produce towns or jewellery towns (Tregaron). These market towns are large enough in population to obtain a critical mass for maintaining these type of services. They would be developed as leisure markets with new functions and new identities, based upon their current strengths.

3. People expect to **live** in societies that:

- Have a clean and healthy environment;
- Will maintain the natural environment;
- Will have lower levels of crime;
- Will experience a reduction in the levels of deprivation and exclusion;
- Will provide an increased level of wealth for every member of society;
- Provide fulfilling expectations for a satisfying life in terms of social and working life;
- Contain happier societies with high levels of local social capacity;
- Will have greater access to leisure activities.

4. People will be **working** in circumstances:

- With greater degrees of flexibility in terms of the hours that they work;
- Where it is possible to take breaks from work to attend farming duties;
- Where they travel less time to work;
- Where they undertake less work-related travel;
- Where the need for adaptability between different careers will be even greater.

5. People will **travel and communicate**:

- Quicker and more efficiently;
- More by rail and air, and quicker by road;
- With easier access to a developed IT infrastructure.

6. Additionally, the county will contain:

- A greater physical presence of financial services;
- A multi-use and functional local school – the focus will move away from a single use and school will become centres for learning, for businesses and for communities;
- A rural investment bank to circulate investment within the county.

## **Group 2**

### **School** - extensive use

Centre for access, ITC, occasional use for work

Flexible hours

Café

Crèche and care facilities for children before and after school

Playing fields, leisure and park

(The Learning Mall)

**Care** - growth sector (more elderly people) extensive provision available / owned by local people

**Investment** - local investment bank, for people to invest in local development, Credit unions

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## **Work**

- High value work (Internet, crafts, wood and energy (as a sector)) in a range of sectors;
- Changes in ways of working;
- Less time pressure – not having to work such long hours;
- Better balance between time spent working and not working;
- Less time spent travelling;
- Spend some of the working week from home;
- Spend some time working elsewhere (such as Cardiff);
- Easier to make changes in the type of work being done;
- Ideas Lab: develop new, radical, leading edge solutions: 'adding value via brain cells' leading to activity that adds value;
- The community (identified as group of people on the same wavelength) responsible for driving new developments, gaining control of the agenda and with a ambitious vision;
- Health: extensive provision in a better health centre and economic opportunity in the sector;
- Changes in the way that we work: increase in the units that generate income from farming other activities;
- Recycling becoming a way of life, greater sharing of resources (businesses and individuals);
- Shopping Basics bought on-line;
- Fresh produce increasingly bought locally;
- Specialised shops central to the town centre experience (attracting people from local and distant areas).

## **Young People**

- High quality social provision (Saturday clubs, disco etc);
- Specialised work, ITC, games, many grown from the Ideas Lab.

## **Opportunity**

Add value within sectors  
Information  
Food and Seafood  
Wood  
Energy  
Tourism/rural/green  
Production  
Culture and media  
Buy more locally  
New ways of working in partnership

## **Group 3**

- Cross-section of ages in population;
- Community spirit – sense of identity/place;
- Range of civic amenities – rural population not disadvantaged by concentration of services in towns;
- Sense of commitment to/ ownership of place where people live;
- More time to live;

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- Less travel to work;
- High speed communications infrastructure (NB present BT communications monopoly means that essential high speed – e.g. fibre optic – communications are unlikely to reach Ceredigion until it's too late to take advantage of new communications based industries);
- Schools also seen as community resource centres;
- Important to retain schools to reinforce local community but avoid disadvantaging children by maintaining very small units – balance needed between good education/social interaction – but use of distance learning by video, etc can reduce pressures on small teaching staff;
- Flexibility in delivering certain services – e.g. education taking advantage of video links;
- Local governance – subsidiarity in local government – a more positive role for local people in decisions which affect them;
- Thoroughly bilingual – a cogent attempt to integrate cultural diversity between indigenous and incoming cultures;
- Cultural vibrancy – moving ahead rather than being stuck in the past;
- Confidence/pride in Ceredigion – not looking for somewhere better to go and live;
- Sport development – both for local community and as a national/regional resource;
- Youth facilities – no youth club in Aberystwyth – imaginative provision of places to go and things to do in them for young people, including entrepreneurship centres;
- Use local produce/facilities – develop niches such as local organic products;
- Local branding (note meal in Ty Glyn Aeron full of international ingredients with no local flavour or individuality);
- Health – both in terms of adequate treatment facilities for the sick and also lifestyles encouraging better health;
- Full employment (sustainable) within reasonable travelling distance;
- Organisation of micro businesses into more competitive groups;
- Local sourcing of goods and services;
- Encouraging best practice by improved international links;
- Use universities to generate new opportunities in knowledge-based activities and to support best practice and continuing education in local commerce;
- Biotechnology offer some such opportunities;
- Improved opportunities for young people to reverse out-migration;
- Education now seen as a passport to out-migration needs to be better tuned to retention of local youth;
- Social/economic restraints on retaining young people in rural communities need to be lifted;
- Micro businesses no good in providing succession – critical mass needs to be achieved;
- Infrastructure, especially transport and communications, needs to be adequate to the needs of communities and business development;
- Universities more entrepreneurial and interfacing better with their localities;
- Better competition in ICT provision;
- Better packaging of tourism product in order to compete more effectively for new traffic;
- Better use of semi-retired businesspeople – rather than run half-hearted businesses, act as co-ordinators for new business/community partnerships;
- Mid Wales Manufacturing group indicates value of such co-operation;
- Need for integration of business premises and housing in rural towns;

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- Need for provision of both commercial premises and housing at affordable rates;
- Need for provision of flexible funding support for business development (including, eg, Banc y Cardi).

#### **Group 4**

- Village redevelopment - less ruins, better buildings - chapels and schools for community use;
- Retention of rural services post offices and independent retail;
- After school clubs and crèche facilities, greater focus in community life;
- Need to take account of needs of an ageing population;
- Greater scope for social re-investment from elderly- business advice/childcare
- Inclusion/ overcoming rural isolation;
- Renewable;
- Welsh “safe”- bi-lingualism no longer an issue;
- Better gender balance;
- Better countryside access;
- Leisure, arts and sport- rugby, football and athletics facilities;
- Theatre refurbishment to include cinema provision;
- Empowerment from ICT, and threat to community life;
- Need to look at structures for business growth;
- Sectors with strong demand, expertise and high levels of re-investment;
- Need to strengthen marginal businesses;
- Greater business awareness and individual talent recognition;
- Need for development bank/risk capital;
- Sectoral strength built around cultural and environmental tourism, agriculture and manufacturing (including energy, technology, food, recycling and media, cultural industries);
- Overcome skill shortages in engineering;
- Develop the micro businesses;
- Value added up and down stream.

## MAIN THEMES FOR DEVELOPMENT

Themes suggested as priorities for development	No's stating priority		
	1	2	3
<b>Group 1</b>			
<b>Develop social and economic capacity of communities at all levels</b> (Develop identity and increase belonging; develop sense of community and raise confidence; ensure social inclusion for individuals and groups)	8	9	1
<b>Develop communications infrastructure</b> (Infrastructure and skills within ITC; Transport and travel; Internal communications)	13	6	3
<b>Develop sustainability in economic, social and environmental terms</b> (Environmental enhancement; Develop energy supplies such as biomass and wind)	10	7	1
<b>Added value to primary produce and natural resources</b> (Value must be returned to Ceredigion; Through local purchasing)	14	7	0
<b>Develop green, rural and cultural tourism</b> (High quality and added-value sectors)	11	8	1
<b>Human Resource Development</b>	13	6	1
<b>Partnerships and Co-ordinations</b> (At local and regional levels)	8	10	1

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<b>Group 2</b>			
<b>Communications and Partnerships</b> (Transport, ICT, + new ways of working in really joined up ways)	12	10	2
<b>Adding Value</b> Agri, Timber, knowledge, Alt energy, Tourism / countryside, manufacturing, culture arts media	24	1	0
<b>Local regeneration and rural services</b> (New ways of providing services, a combination of private, public and community)	10	9	3
<b>Innovation and Areas of Opportunity</b> (Leading edge, think tank, R+D)	7	14	2
<b>Improving Business Infrastructure</b>	8	14	1
<b>Developing (Business) Competitiveness</b> (General)	7	14	1
<b>Increasing economic activity rates by empowerment + increasing economic competency</b> (Equal opportunities broad sense, women, excluded, young people etc + increasing entrepreneurship)	13	7	1

<b>Group 3</b>			
<b>Identity</b> (Branding and awareness)	5	13	6
<b>Cultural and environmental tourism</b>	13	8	1
<b>Nurturing Creative talent</b>	21	2	0
<b>Participating</b>	none	made	
<b>Infrastructure</b>	14	5	2
<b>New Product / Added Value</b>	13	10	2

<b>Group 4</b>			
Buy the dome!	0	0	13
<b>Education/training</b> , involving the following steps:	5	10	2
- Awareness raising			
- Preparing community and workforce			
- Find out what people actually want (delegates not convinced that they were sufficiently representative of Ceredigion population as a whole)			
- Partnership/ownership issues			
- Information and communications technology, both as a means and an end to education/training			
Development of co-operative <b>networks for business</b> development/community strengthening	11	6	0
- Freewheeling support mechanisms for new and developing businesses	8	11	0
- Including availability of a range of financial incentives from equity to rate/tax relief			
- Less bureaucratic administration (who ever reads a business plan or cares in which sector the business is located?) to accommodate money-making/employment-generating activity in whichever sector			
- Provision for extended hand-holding/continual support			
- Integration of universities into business development process			
Encourage <b>Universities to develop entrepreneurship</b>	3	11	3
<b>Leisure/cultural/sport development</b> to support holistic communities and new business opportunities	2	8	6
<b>Young people</b>	(new)		
- Integrated into the planning process by consultation and delegation of authority			
- Consulted on vision for future, especially in the areas of technology, innovation and culture			
- Provided for as a main target of economic and social development in Ceredigion			
<b>Community regeneration/sustaining measures</b>	(new)		
- Housing policies			
- Infrastructure			
- Education			