Chapter 16

Socioeconomics

Contents

Glossary

Term	Definition
Environmental Impact Assessment	Environmental Impact Assessment (EIA) is a means of carrying out, in a systematic way, an assessment of the likely significant environmental effects from a development.
Environmental Impact Assessment Regulations	The Town and Country Planning (Environmental Impact Assessment) (Wales) Regulations 2017 (EIA Regulations).
Environmental Statement	A document reporting the findings of the EIA and produced in accordance with the EIA Regulations.
The proposed development	The proposed Y Bryn Wind Farm development.

List of Abbreviations

Abbreviation	Description
AMEP	Access Management and Enhancement Plan
AVAR	Afan Valley Adventure Resort
BAVO	Bridgend Association of Voluntary Organisations
BCBC	Bridgend County Borough Council
DAP	Destination Action Plan
DMP	Destination Management Plan
EIA	Environmental Impact Assessment
ES	Environmental Statement
GB	Great Britain
GDHI	Gross Disposable Household Income
GVA	Gross Value Added
LDP	Local Development Plan
LPA	Local Planning Authority
LSOA	Lower Super Output Areas
MW	Megawatt(s)
Natural Power	Natural Power Consultants Ltd
NPT	Neath Port Talbot
NPTCBC	Neath Port Talbot County Borough Council
NPTCVS	Neath Port Talbot Council for Voluntary Service
NNR	National Nature Reserve
NRW	Natural Resources Wales
ONS	Office of National Statistics
PEDW	Planning and Environment Decisions Wales
PINS	Planning Inspectorate
PPA	Power Purchase Agreement
PPW	Planning Policy Wales
PRoW	Public Rights of Way
RLDP	Replacement Local Development Plan
SOC	Standard Occupational Classification
SSSI	Sites of Special Scientific Interest
SWIC	South Wales Industrial Cluster
TAN	Technical Advice Note
UK	United Kingdom
WG	Welsh Government
WIMD	Welsh Index of Multiple Deprivation
ZTV	Zone of Theoretical Visibility

16.1 INTRODUCTION

16.1.1 This chapter of the Environmental Statement (ES) has been compiled by Natural Power Consultants Ltd (Natural Power) and assesses the potential socioeconomic impacts occurring as a result of the proposed development, and provides an assessment of effects at a local, Welsh and United Kingdom (UK) level.

16.1.2 As stated in Chapter 1: Introduction, the proposed development is located in both Neath Port Talbot County Borough Council (NPTCBC) and Bridgend County Borough Council (BCBC) areas, in south Wales.

16.1.3 The proposed development will consist of up to 18 turbines with tip heights ranging from up to 206 m to 250 m, with a capacity of up to 129.6 megawatts (MW). It has a planned operational lifespan of up to 50 years.

16.1.4 This chapter outlines policies considered relevant to the potential socioeconomic impacts of the proposed development, and how it will contribute toward targets and objectives set out within Welsh and local strategies.

16.2 CONSULTATION

16.2.1 As part of the scoping process for the proposed development, a Scoping Report was issued to (the former) Planning Inspectorate (PINS) Wales, who collated consultee responses to form the Scoping Direction (following comments within Appendix 1 of the Environmental Impact Assessment (EIA) Scoping Direction (see Appendix 3.2: Scoping Direction within Volume 3 of the ES). A full description of consultation on socioeconomics including tourism is included in Table 16.1.

Table 16.1: Consultee scoping responses relating to socioeconomics

Consultee	Comments/ issues raised/ recommendations	Addressed responses/ outcomes
NPTCBC	'The Authority is concerned about the impact of the proposed development upon the existing and future growth of tourism within the coastal plane and valley areas. There are limited employment opportunities within the valley areas, but one area of growth has been the development of small scale tourism facilities. Many of these are located within the communities that surround the proposed development areas. Such as a variety of overnight accommodation as well as companies which support the growing walking and particularly cycle related actives. In recent years there have also been tentative moves to large scale tourism projects such as the Afan Adventure Park and the Rheola House Projects, as well as the Council's own initiatives based around Margam Country Park, Afan Forest Park and Glyncorrwg Mountain Bike Centre, and the Aberavon Seafront. It is difficult to see how the proposed development would have a beneficial impact upon this industry and it is essential that any and all potential negative impacts upon the socio-economic environment including tourism must be fully and comprehensively assessed, monitored and where possible systematically mitigated.'	Tourism has been included in the socio-economics chapter as part of the economic baseline, and the assessment itself includes tourism as part of the wider economic landscape. This chapter lists specific assets in the NPTCBC and BCBC areas and assesses potential effects of the proposed development in the context of the available evidence base. In addition to this chapter, specific tourism receptors are also assessed in Chapter 8 in terms of landscape and visual effects, and Chapter 9 in terms of heritage assets. Chapter 15 assesses the effects and potential enhancements on Public Rights of Way (PRoW) within Y Bryn site boundary. It should be noted that BCBC agreed for Tourism to be scoped out of the assessment.

16.3 METHODOLOGY

16.3.1 This chapter considers the UK, Welsh and local (counties in which the proposed development is located) socioeconomic impacts associated with the proposed development. The chapter also outlines policy, advice and guidance documents relevant to onshore wind farm development socioeconomics, together with characterising the baseline socioeconomic situation, and identifies areas in which the proposed development could positively or negatively contribute to the well-being of current and future generations.

16.3.2 Where other ES chapters follow methodology widely recognised by statutory and governing bodies, there is no such recognised methodology for socioeconomics assessments. The methodology adopted will assess the following key stages:

- Existing economic environment (baseline) using official data on population, industrial structure, unemployment and economic activity levels, income and earnings;
- The potential economic effects during the development and construction phase of the proposed development, including direct employment, supplier effects and income effects;
- The potential economic effects during the operation and decommissioning phases of the proposed development including direct employment, supplier effects and income effects;
- The economic effects arising from infrastructure improvements and potential community benefits and shared ownership;
- Consider and report on mitigation and management measures which could be implemented to minimise any negative impacts and maximise potential positive impacts; and
- Assess the significance of effects.

16.3.3 Significance of effect has been determined through the author's professional judgement on predicted changes to the baseline. Conclusions are qualitative, and significance criteria are detailed in Table 16.2. This chapter also highlights how the proposed development supports UK and Welsh strategy and policy documents relating to socioeconomics and identifies what benefits the proposed development could provide locally should it be granted consent.

16.3.4 Baseline conditions were established through desktop studies. The following sources of information were used in the completion of this chapter:

- Relevant economic development strategies and policies at UK and Welsh levels;
- Official statistics including: NOMIS, Office of National Statistics (ONS), Census 2011, StatsWales, Tourism Alliance, and Tourism Satellite Account; and
- Economic impact assumptions drawn from RenewableUK publications on the economic benefits of onshore wind farms.

16.3.5 This socioeconomic assessment is grounded on a RenewableUK publication[1] on economic impact modelling utilising the most recent industry research, conducted by BiGGAR Economics. The report discusses the economic impacts of onshore wind farm development and has shown, through investigation of numerous case studies across

[1] RenewableUK. (2015) *Onshore Wind: Direct and Wider Economic Benefits.* [Online]. Available from - https://cdn.ymaws.com/www.renewableuk.com/resource/resmgr/publications/reports/onshore_economic_benefits_re.pdf [Accessed 26/05/2023]

the UK, how expenditure from the different phases of wind farm development (e.g. construction, operation, maintenance and decommissioning) is passed to the local, regional and national economy. As such, this provides a model which can be utilised to illustrate the potential quantifiable economic impacts that the proposed development can have for the NPTCBC and BCBC areas, Wales and the UK. This research method has been deployed on numerous other socioeconomic assessments of onshore wind farms across the UK and is considered an applicable and quantifiable approach.

16.3.6 The assessment calculates the socioeconomic impact from the construction of 18 turbines. The employment and resultant gross value added (GVA) impacts are based on the indicative maximum generating capacity of 129.6 MW.

16.3.7 We note the concern raised by NPTCBC on the impact of the proposed development on existing and future growth of tourism. Having regard to the Evidence Base as set out below, in this chapter we will assess the economic baseline of the area, including the importance of the tourism sector. All further assessment in this chapter will include tourism as part of the wider economic landscape. However, key features of interest to tourism, including for example public access and rights of way, mountain biking trails and visitor attractions, are addressed in their relevant context within other assessment chapters (Chapters 8, 9, and 15 in particular).

Assessment of Potential Significance of Effects

16.3.8 As noted, there is no approved methodology for defining significance of effects for socioeconomics. The following criteria is based on the professional judgment of Natural Power.

Table 16.2: Socioeconomics significance criteria

Major	Major loss/improvement to key elements/features of the baselines conditions such that post development character/composition of baseline condition will be fundamentally changed. For example, a major long-term alteration of socio-economic conditions.
Moderate	Loss/improvement to one or more key elements/features of the baseline conditions such that post development character/composition of the baseline condition will be noticeably changed. For example, a moderate alteration of socio-economic conditions.
Minor	Changes arising from the alteration will be detectable but not material; the underlying composition of the baseline condition will be similar to the pre-development situation. For example, a small alteration of the socio-economic conditions.
Negligible	Very little change from baseline conditions. Change is barely distinguishable, approximating to a 'no change' situation

16.3.9 Effects of Moderate or Major are considered to be significant in EIA terms.

16.4 POLICY AND EVIDENCE

16.4.1 All relevant national legislation, planning policies, guidelines, development plans and other material considerations are addressed in Chapter 2: Legal and Policy Context. A summary of those matters related to socioeconomics is included in this section.

16.4.2 This assessment includes a review of existing economic development policies, referencing tourism strategies where applicable, at the UK, Welsh and local level, together with reference to the evidence base.

Legislation

The Well-being of Future Generations (Wales) Act 2015

16.4.3 The Well-being of Future Generations Act 2015[2] provides Welsh Government (WG) policy direction which seeks to improve the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language.

16.4.4 Notably, several of the goals are directly linked to the environment, climate change and a low carbon society.

Goal 1: A prosperous Wales, aims for Wales to become '*An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); …and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.'*

Goal 2: A resilient Wales, aims for Wales to be a nation which '*…adapts to change (for example climate change).'* Lastly, Goal 7: a globally responsible Wales, aims for Wales to become '*a nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.'*

Welsh Policy, Advice and Guidance

Future Wales: The National Plan 2040

16.4.5 Future Wales: The National Plan 2040[3] is a national development framework to guide the direction of development in Wales up to 2040 and was published and adopted in February 2021 by the WG. The strategy for the plan is to address priorities that are of national importance through the planning system, including: improving the health and well-being of our communities, achieving decarbonisation, developing strong ecosystems, climate resilience, and sustaining and developing a vibrant economy.

16.4.6 With respect to economic development, Future Wales was shaped by the WG policy: Prosperity for All: Economic Action Plan[4]. The Plan highlights areas where funding support will be provided, such as on businesses that align

[2] Welsh Government. (2015) *Well-being of Future Generations (Wales) Act 2015.* [Online] Available from - https://www.legislation.gov.uk/anaw/2015/2/enacted. [Accessed 31/03/2023]

[3] Welsh Government. (2021). *Future Wales: the national plan 2040.* [Online]. Available from - https://gov.wales/future-wales-national-plan-2040 [Accessed: 05/08/2022]

[4] Welsh Government. (2019). *Prosperity for All: economic action plan.* [Online]. Available from - https://gov.wales/prosperity-all-economic-action-plan. [Accessed 31/03/2023]

with the government's decarbonisation objectives, support skills development and provide high-quality employment.

16.4.7 There are three points emphasised by Future Wales with particular relevance to the proposed development:

- Support a low carbon economy and the decarbonisation of industry, and the growth of sustainable and renewable energy;
- Recognise the importance of key future sectors such as renewable technologies; and
- Support infrastructure development, including energy.

16.4.8 WG recognises that to increase the Welsh economic prosperity they must focus on delivering clean energy. Thus, the consent of the proposed development could increase the economic prosperity for Wales.

16.4.9 Within Future Wales, Policy 17: Renewable and Low Carbon Energy and Associated Infrastructure, states that '*proposals should describe the net benefits the scheme will bring in terms of social, economic, environmental and cultural improvements to local communities*.' The social and economic benefits from the proposed development to local communities are discussed in Section 16.5 of this chapter.

Planning Policy Wales

16.4.10 Published as Edition 11, in February 2021, the Planning Policy Wales (PPW)[5] document contains the current land use planning policy for Wales. It provides a framework for the effective preparation of development plans by local planning authorities (LPAs) and is supplemented by 24 topic based Technical Advice Notes (TANs).

16.4.11 PPW recognises that the planning system contributes to achieving sustainable development and states that '*it must reconcile the needs of development and conservation, securing economy, efficiency and amenity in the use of land, ensuring the sustainable management of natural resources and protecting, promoting, conserving and enhancing the built and historic environment*.'

16.4.12 The section on Economic Development and Tourism within chapter 7 of PPW, 'Productive and Enterprising Places' is of particular relevance to this assessment. The WG defines economic development as '*the development of land and buildings for activities that generate sustainable long-term prosperity, jobs and incomes.'* Importantly it states that *'the planning system should ensure that the growth of output and employment in Wales as a whole is not constrained by a shortage of land for economic uses*.'

16.4.13 With respect to tourism, PPW states that '*the planning system encourages tourism where it contributes to economic development, conservation, rural diversification, urban regeneration and social inclusion, while recognising the needs of visitors and those of local communities*.'

16.4.14 Within the plan, a strong emphasis is placed on growth in innovative, emerging technology and high value-added sectors such as renewable and low carbon energy.

16.4.15 This activity has great bearing on the proposed development, in that PPW seeks to maximise the development of renewable and low carbon energy.

16.4.16 A separate TAN for Economic Development (TAN23)[6] was published by the WG in February 2014. TAN23 provides further detail on the importance of measuring economic benefit when appraising planning applications. Of relevance to this chapter is the reference '*where economic development would cause environmental or social harm which cannot be fully mitigated, careful consideration of the economic benefits will be necessary.'* The TAN emphasises the importance of capturing economic benefits as part of the decision-making process, including the number of 'jobs accommodated'.

16.4.17 TAN23 is focused on creating the right conditions for economic growth, outlining that the economic benefits associated with development may be geographically spread out far beyond the area where the development is located. As a consequence, it is essential that the planning system recognises, and gives due weight to, the economic benefits associated with new development.

16.4.18 The TAN for Tourism (TAN13)[7], although somewhat outdated (published in 1997), states that tourism is a major contribution to the Welsh economy, provides employment in a wide variety of occupations and can bring benefits to local economies and communities in both urban and rural areas.

Welcome to Wales: Priorities for the visitor economy 2020 – 2025

16.4.19 This document, published in January 2020, highlights the importance of the tourism industry in Wales.

16.4.20 The report states that '*overnight visitors grew by 14%'* and that '*more than 9% of the workforce in Wales is now employed in tourism. It is one of the country's fastest growing sectors and benefits many rural areas as the main driver of the economy and source of employment.'*

16.4.21 The plan's goals are to increase tourism to benefit Wales, economically, environmentally, socially and culturally. Its primary goal is to '*harness the potential for tourism to improve the wider economic wellbeing of Wales.'*

Local Guidance

Neath Port Talbot County Borough Council Local Development Plan (LDP) 2011-2026 (adopted 2016)

16.4.22 The NPTCBC LDP[8] was adopted in January 2016 and sets out the vision for NPTCBC development plans over 2011-2026. A Replacement LDP (RLDP) is currently being worked on which will cover the period 2021-2036. NPTCBC have published a draft which has been through consultation and a Delivery Agreement was approved by WG in January 2022. It is anticipated that adoption of the RLDP will be in July 2025.

16.4.23 The LDP highlights economic growth as being a key issue and specifies that '*in order to address the key issues of NPT, wealth creation through job growth is fundamental to achieving the LDP vision*.' The LDP goes on to highlight how NPTCBC area has experienced low levels of economic activity and high levels of unemployment among the working age population thus indicating quite a large untapped labour force.

16.4.24 Tourism within NPTCBC area has become a significant contributor to the local economy and has provided a variety of opportunities, especially within the valley areas. The strategy and policies seek to support this industry by taking a flexible approach to new tourism proposals and resisting where possible the loss of existing facilities.

16.4.25 The LDP's tourism policy highlights that economic prosperity will increase with a growing tourism sector by '*supporting tourism proposals through the allocation of land for tourism development*.'

[5] Welsh Government. (2021) *Planning Policy Wales*. [Online] Available from - https://gov.wales/planning-policy-wales. [Accessed 31/08/2023]

[6] Welsh Government. (2014). *Technical advice note (TAN) 23: economic development*.[Online] Available from - https://gov.wales/technical-advice-note-tan-23-economic-development. [Accessed 31/03/2023]

[7] Welsh Government. (1997). *Technical advice note (TAN) 13: tourism*. [Online] Available from - https://gov.wales/technical-advice-note-tan-13-tourism. [Accessed 31/03/2023]

[8] Neath Port Talbot County Borough Council. (2016). *Local Development Plan (2011-2026)*. [Online] Available from - https://www.npt.gov.uk/PDF/ldp_written_statement_jan16.pdf. [Accessed 31/03/2023]

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

16.4.26 The NPTCBC DMP[9] sets out the county's aim '*to manage a destination over a stated period of time, articulating the roles of different stakeholders and identifying the clear actions that they will take*'. It makes clear the council's belief that the visitor economy is potentially one of the largest drivers of economic growth in the NPTCBC area.

16.4.27 The stated aim of the DMP is '*To maximise the potential for growth in the Neath Port Talbot visitor economy, through the adoption of a strategic approach to the management and maintenance of a high quality visitor experience.*' Objectives include increasing the contribution that visitor spending makes to Neath Port Talbot's (NPT) economy; establishing NPT as a high quality visitor experience; and developing partnerships between key tourism stakeholders. The DMP contains a comprehensive action plan to deliver its aims and objectives.

16.4.28 Mountain biking in particular is highlighted as success story in terms of return from investment, and the DMP states that NPTCBC area '*is now one of the best established areas for mountain biking within the UK*'.

16.4.29 In a report to the Scrutiny Committee in February 2021, it was highlighted that the DMP has not been able to be updated due to NPTCBC's Tourism Team prioritising the delivery of COVID-19 support to the sector.

Bridgend County Borough Council Local Development Plan (LDP) 2006-2021

16.4.30 The BCBC (LDP)[10] was adopted in June 2011 and sets out the vision for BCBC development plans over 2006-2021 with a Replacement LDP, for the period 2021-2033, currently going through consultation. Confirmation on when the RLDP will be adopted has yet to be confirmed.

16.4.31 The LDP's aims are that by the end of 2021 BCBC will be '*transformed to become a sustainable, safe, healthy and inclusive network of communities comprising strong, interdependent and connected settlements that can offer opportunities, an improved quality of life and environment for all people living, working, visiting and relaxing in the area.*'

16.4.32 The LDP Strategy places a high value on the importance of tourism and the tourist industry to the economy of BCBC.

Bridgend County Borough Economic Strategy

16.4.33 An Economic Strategy for Bridgend County Borough was published in February 2022[11]. The strategy presents a framework to support BCBC and its economic development. The strategy intends to set out a *'path to a sustainable recover that can yield economic, social, and environmental returns'.*

16.4.34 From the result of stakeholder feedback the strategy has set out four key pillars to help realise economic prospects for BCBC. Two out of the four pillars are particularly relevant to the proposed development: 'business and workforce support' and 'low carbon economy'.

16.4.35 Within the fourth pillar: 'low carbon economy' the strategy has set out to address 'energy' as one of the key opportunities.

16.4.36 Also, within the strategy's specific ambitions it refers to the need to shift to a low-carbon economy, as well as stimulate high-skilled jobs in the future economy. The proposed development could contribute specifically towards these two ambitions and pillar four: 'low carbon economy'.

Bridgend County Borough Council Destination Management Plan 2018 – 2022

16.4.37 The BCBC DMP[12] states that '*Tourism cannot be left to develop unchecked. It has to be managed in a sustainable way, to maximise the benefits for long-term prosperity and reduce the negative impacts.*'

16.4.38 The stated aim of the BCBC DMP is to '*Develop a thriving visitor economy in Bridgend which celebrates the unique strengths of the place, supports jobs, generates business opportunities and improves the range of amenities available for visitors and local people.*' This aim is supported by the priorities of developing the tourism product in the area; supporting the development of tourism infrastructure; and raising the counties profile in order to attract more visitors. BCBC are aiming for a 2% overall growth per annum in the sector.

16.4.39 The DMP is supported by a Destination Action Plan (DAP)[13], which contains specific actions to deliver the aims and priorities laid out in the DMP.

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

16.4.40 This document[14] represents a framework to support south-west Wales and its future economic development. The framework intends to '*enhance the long-term prospects of the City Region economy, its business and communities.*'

16.4.41 The strategy recognises skills development as a fundamental part of the strategy, following the region's struggle with unemployment since the 2008 recession. Skills, and ambition for long-term success, learning and employability are key strategic aims of the strategy.

16.4.42 The strategy identifies energy as being a key sector that could drive productivity gains and boost the region's economic competitiveness.

16.4.43 Within the strategy's vision it specifies the City Region as becoming a leading UK centre for renewable energy. The proposed development could offer a significant contribution towards achieving this vision.

Cardiff Capital Region Industrial and Economic Plan (2020)

16.4.44 The Industrial and Economic Plan for Cardiff Capital Region[15] sets out *'ambitious and long-term plan to boost productivity and accelerate economic growth'* in the region. It sets out two objectives in delivering sustainable and inclusive growth, being boosting competitiveness and tackling inequalities. It notes that they will support sectors such as energy and environment if a compelling case is made.

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[9] Neath Port Talbot County Borough Council. (ND). *Neath Port Talbot Destination Management Plan 2015 to 2020.* Available from - http://www.npt-business.co.uk/media/4345/neath-port-talbot-destination-management-plan-2015-2020-final.pdf [Accessed 31/03/2023]

[10] Bridgend County Borough Council. (ND). *Existing Bridgend local plan 2013.* Available from - https://www.bridgend.gov.uk/residents/planning-and-building-control/development-planning/existing-bridgend-local-plan-2013/. [Accessed 31/03/2023]

[11] Bridgend County Borough Council. (2022). *An Economic Strategy for Bridgend County Borough.* Available from - *https://democratic.bridgend.gov.uk/documents/s26712/Appendix%201%20Bridgend%20County%20Economic%20Strategy%20FINAL.pdf?LLL=0.* [Accessed 31/03/2023]

[12] Bridgend County Borough Council. (2018). *Destination Management Plan 2018-2022.* Available from - https://www.bridgend.gov.uk/media/6228/bridgend-destination-management-plan-2018-to-2022.pdf [Accessed 31/03/2023]

[13] Bridgend County Borough Council. (2018). *Destination Action Plan 2018-2022.* Available from - https://www.bridgend.gov.uk/media/6229/bridgend-destination-action-plan-2018-to-2022.pdf [Accessed 31/03/2023]

[14] *Swansea Bay City Region Economic Regeneration Strategy 2013-2030.* Available from - https://www.swansea.gov.uk/media/2815/Swansea-Bay-City-Region-Economic-Regeneration-Strategy/pdf/Swansea_Bay_City_Region_Economic_Regeneration_Strategy.pdf?m=1630588190013 [Accessed 31/03/2023]

[15] Cardiff Capital Region, (2020). *Cardiff Capital Region Industrial and Economic Plan.* Available from - https://www.cardiffcapitalregion.wales/wp-content/uploads/2020/12/ccr-industrial-and-economic-growth-plan-english.pdf [Accessed: 31/03/2023]

Evidence Base

Wind Farms and Tourism

16.4.45 In terms of tourism effects, a review of the literature evidence suggests that overall research supports the premise that wind farm development has not tended to result in a serious negative economic impact on tourism and could even have wider positive impacts.

16.4.46 The most recent research on the economic impact of wind farms on tourism was published by BiGGAR Economics in 2021[16]. The research showed that, from an analysis of 44 wind farm case studies in Scotland, there was no correlation between wind farm development and trends in tourism employment. In fact the research showed that the tourism economy in local authorities that had seen the largest increase in onshore wind activity had performed the same, if not better, than other areas in Scotland.

16.4.47 Furthermore, a more recent UK tracker survey[17] outlined that support for renewable energy has been consistently high, with 87% expressing support for the use of renewables, whilst opposition to renewables was very low at 1%. And more specifically, the national tracker found that 90% supported onshore wind, with only 4% opposing it.

16.4.48 At a Welsh level, the most relevant and recent research on wind farm impacts on tourism was published by the WG in February 2014[18]. The research outlines a number of key findings that show there is little evidence to suggest wind farms have had/or are having detrimental impacts on tourism across Wales.

16.4.49 A report commissioned by Northumberland County Council in October 2014[19] stated that actual and prospective tourists to UK destinations where wind turbines are present appeared to be more positive toward wind farms than the tourism-related businesses in those destinations, suggesting a discrepancy between perceived and actual impacts of onshore wind farms on tourism.

16.4.50 In a 2014 position statement[20], Visit Scotland, the Scottish national tourism organisation, confirmed their support for renewable energy including wind farm development. They also re-iterated the fact that research had shown wind farms have little impact on visitors' decision to go on holiday in Scotland, while acknowledging the concern of some groups around potential impacts of wind farms on tourism.

16.4.51 Some wind farms have proved to be tourist attractions in their own right. A 2019 study into Whitelee Wind Farm[21] by BVG associates, commissioned by Scottish Power Renewables, found that since opening in 2009, it had received 750,000 visits to its visitor centre, and on average 200,000 people a year visit the wind farm site for recreational activities such as walking, cycling and running.

The Multiplier Effect

16.4.52 Wind farms have an indirect economic impact, known as the multiplier effect, through economic activity and employment generated by their supply chain as a result of the purchasing of goods and services from local and regional suppliers. For example, workers will be needed on-site during all of the phases of the wind farm development (development, construction, operational, decommissioning). A case study from BiGGAR Economics[22] calculated that for every MW of wind energy constructed, approximately £7,500 is spent in the local area on accommodation and food and drink by workers involved in these projects.

16.4.53 Local companies profit indirectly from procurement expenditures made throughout the construction and operational phases, which may also help create more local jobs. It is estimated by Renewables UK that the renewable sector contributes more than £100 million in terms of expenditure on staff, goods and services and sub-contracting to the Welsh economy. Including the indirect and the multiplier effects of wind farm projects, it is estimated that the total contribution of the sector is over £150 million to the Welsh economy[23].

16.4.54 Wind farm projects attract inward investment that contribute to the growth of local economies. Increases in investment will also have multiplier or knock-on effects in the rest of the Welsh economy, through the supply chain and increased expenditure in the area. This happens throughout the whole life cycle of a wind farm, from construction phase to the operational phase, and also the maintenance of the wind farm.

16.4.55 The various Welsh Industry sectors are interconnected by, and receive mutual benefits through, their trading relationships. The extra jobs and spending benefits could largely be considered as net additional to the local economy. Through the numerous rounds of supply chain and consumer spending, a wide range of sectors in the Welsh economy will experience some degree of benefit as a result of wind farm projects and their associated induced and indirect effects.

Rent and Rates Payable

16.4.56 Wind farm projects result in rent and rates that can benefit the local and/or regional economy. In Wales, business rates are collected by local authorities and paid into a national 'pool' administered by the WG. They are then redistributed to Welsh local authorities, for the provision of services[24]. Wind farms in Wales pay approximately £10,000 per annum per 1 MW installed capacity in business rates.

16.4.57 A public sector landlord will be responsible for the proposed development; therefore, the rent will benefit the provision of devolved public services within Wales.

16.5 BASELINE

16.5.1 This subsection summarises the baseline characteristics of the local area and compares them against a Welsh and national context in terms of population, industrial structure, critical strategic employers, unemployment and economic activity levels, income and earnings, and the relative economic importance of tourism. These are presented to demonstrate what impact the proposed development may have on the local area.

16.5.2 In order to provide a comparison the following geographical areas were assessed:

- Local: defined as NPTCBC and BCBC area;

[16] BiGGAR Economics. (2021). *Wind Farms & Tourism Trends in Scotland: Evidence from 44 Wind Farms.* Available from - https://biggareconomics.co.uk/wp-content/uploads/2021/11/BiGGAR-Economics-Wind-Farms-and-Tourism-2021.pdf. [Accessed 31/03/2023]

[17] Official Statistics. (2021). *BEIS Public Attitudes Tracker: Energy Infrastructure and Energy Sources Autumn 2021, UK.* Available from - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1040725/BEIS_PAT_Autumn_2021_Energy_Infrastructure_and_Energy_Sources.pdf [Accessed 31/03/2023]

[18] Welsh Government. (2014). *Study into the Potential Economic Impact of Wind Farms and Associated Grid Infrastructure on the Welsh Tourism Sector.* Available from - https://gov.wales/sites/default/files/publications/2019-06/potential-economic-impact-of-wind-farms-on-welsh-tourism_0.pdf. [Accessed 31/03/2023]

[19] Northumberland County Council. (2014). *Evaluation of the impacts of onshore wind farms on tourism.* Available from - https://www.northumberland.gov.uk/NorthumberlandCountyCouncil/media/Planning-and-Building/planning policy/Core strategy/Evidence based/EB14-Evaluation-of-the-impacts-of-onshore-wind-farms-on-tourism.pdf [Accessed 31/03/2023]

[20] Visit Scotland. Available from - https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/policies/visitscotland-position-statement---wind-farms---oct-2014.pdf [Accessed 31/03/2023]

[21] BVG Associates. (2019). *10 years of Whitelee Windfarm.* Available from - https://bvgassociates.com/wp-content/uploads/2019/06/BVGA_SPR-Whitelee_10_year_anniversary-r1.pdf [Accessed 31/03/2023]

[22] Renewable UK, 2012. *Onshore Wind: Direct & Wider Economic Impacts*. [ebook] RenewableUK, pp.46. Available from - https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/48359/5229-onshore-wind-direct--wider-economic-impacts.pdf [Accessed 31/03/2023].

[23] RenewableUK. Available from - https://www.renewableuk.com/page/Cymru [Accessed 31/03/2023].

[24] Welsh Parliament. (2021). *How do business rates operate in Wales?* Available from - https://research.senedd.wales/research-articles/how-do-business-rates-operate-in-wales/ [Accessed 31/03/2023].

- Wales: the regional area; and
- Great Britain (GB): the national area, defined as England, Wales and Scotland. In some cases, due to data availability the UK (England, Northern Ireland, Scotland and Wales) was used.

Population

16.5.3 According to mid-year population estimates from the ONS[25], the local area had a total population of approximately 291,925, in 2020 which, with an average population density of 458 persons per square kilometre, is more densely populated than Wales (153 persons per square kilometre) as a whole.

16.5.4 Between 1991 and 2020 the local population increased by 8.8% compared to a 10.3% rise in Wales overall.

16.5.5 Table 16.3 outlines the local areas age profile, based on mid-year 2020 estimates.

Table 16.3: Local Population Age Structure, 2020

Population Age	Number	%
0 - 4	14,859	5.1%
5 - 15	36,447	12.5%
16 - 64	180,197	61.7%
65 - 74	33,167	11.4%
75 +	27,255	9.3%

Source: Mid-year population estimates 2020, ONS

16.5.6 Table 16.4 compares the proportion of the population which is of working age (16 – 64) at the local, Welsh and GB levels. Results show that the local area has a very similar proportion of working residents compared to Wales and GB, and this is consistent across gender.

Table 16.4: Working Age Population, 2020

	Local	Wales	GB
All people	61.7%	61.2%	62.4%
Males	62.6%	61.8%	63.1%
Females	60.9%	60.5%	61.7%

Source: Mid-year population estimates 2020, ONS

16.5.7 Population projections[26] suggest that the local area's population is projected to increase from 287,782 in 2018 to 310,607 by 2043.

Industrial Structure

16.5.8 Comparable occupation figures at the local, Welsh and GB levels are presented in Table 16.5.

Table 16.5: Employment by Occupation, July 2020 – June 2021

	Local	Wales (%)	GB (%)
Standard Occupational Classification (SOC) 2010 Major Group 1-3	**43.0%**	**45.9%**	**49.8%**
1 Managers, Directors & Senior Officials	8.8%	9.6%	10.8%
2 Professional Occupations	20.3%	20.8%	23.3%
3 Associate Professional & Technical	13.8%	15.3%	15.5%
SOC 2010 Major Group 4-5	**25.0%**	**20.5%**	**19.3%**
4 Administrative & Secretarial	13.8%	10.2%	10.2%
5 Skilled Trades Occupations	11.1%	10.2%	9.0%
SOC 2010 Major Group 6-7	**15.9%**	**17.6%**	**16.2%**
6 Caring, Leisure & Other Service Occupations	9.2%	9.9%	9.0%
7 Sales & Customer Service Occupations	6.6%	7.7%	7.2%
SOC 2010 Major Group 8-9	**16.2%**	**16.0%**	**14.7%**
8 Process Plant & Machine Operatives	1.5%	6.3%	5.6%
9 Elementary Occupations	10.0%	9.6%	9.1%

Source: Annual Population Survey 2021, ONS

16.5.9 The local area has a lower proportion of senior level employees (43%) compared to the Welsh level (45.9%) and the GB level (49.8%). The local area has a higher proportion of 'Soc major group level 4-5' and 'Soc major group level 8-9' than the Welsh and GB levels.

16.5.10 Table 16.6 summarises the industry of employment across each spatial level.

[25] Welsh Government. (2022). *Population density (persons per square kilometre) by local authority and year.* StatsWales. Available from - https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Density/populationdensity-by-localauthority-year. [Accessed 31/03/2023]

[26] Welsh Government. (ND). *Population projections by local authority and year.* Available from - https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2018-based/populationprojections-by-localauthority-year. [Accessed 31/03/2023]

Table 16.6: Industry of Employment, 2019

	Local	%	Wales	%	UK	%
Agriculture, forestry & fishing	700	0.6%	29,000	3.6%	390,300	1.2%
Production	19,200	17.2%	93,700	11.5%	2,882,900	8.6%
Construction	8,300	7.4%	59,200	7.3%	2,332,900	7.0%
Wholesale, retail, transport, hotels & food	29,700	26.5%	220,800	27.1%	8,672,600	25.9%
Information & communication	3,400	3.0%	16,500	2.0%	1,455,900	4.3%
Finance & insurance activities	900	0.8%	12,900	1.6%	1,079,700	3.2%
Real estate activities	1,300	1.2%	10,600	1.3%	579,000	1.7%
Professional, scientific & technical activities; administrative & support service activities	11,300	10.1%	82,500	10.1%	6,038,100	18.0%
Public administration, defence, education & health	32,500	29.0%	248,100	30.5%	8,120,500	24.2%
Other service activities	4,600	4.1%	40,900	5.0%	1,963,800	5.9%

Source: Annual Population Survey 2019, ONS

16.5.11 A review of the industry of employment suggests the local area has a higher proportion of production and a comparable proportion of construction related posts compared to Wales and UK. The local area presents a lower incidence of agriculture, forestry & fishing; finance & insurance activities; real estate activities; and other service activities related posts compared to Wales and UK data.

16.5.12 In terms of educational attainment levels, Table 16.7 shows both Wales, and subsequently GB have a higher proportion of residents with higher qualifications than that at the local level. In contrast, the local area has a much higher proportion of residents with 'no qualifications' than both the Wales and GB averages.

Table 16.7: Qualifications, 2020

	Local	Wales	GB
NVQ*4 and above	33.0%	38.5%	43.1%
NVQ3 and above	54.0%	58.3%	61.3%
NVQ2 and above	76.0%	76.5%	78.1%
NVQ1 and above	84.0%	86.7%	87.7%
Other qualifications	6.6%	5.6%	5.9%
No qualifications	10.0%	7.7%	6.4%

**NVQs are based on national occupational standards. These standards are statements of performance that describe what competent people in a particular occupation are expected to be able to do. They cover all the main aspects of an occupation, including current best practice, the ability to future requirements and the knowledge and understanding that underpin competent performance.*

Source: Annual Population Survey 2020, ONS

Critical Strategic Local Employers

16.5.13 There are a small number of critical strategic local employers in the production and construction sectors, including most notably Tata's Port Talbot Steelworks, currently employing approximately 4,000 staff directly, with significant indirect employment in supporting businesses. In 2011, estimates highlighted Tata Steel contributed 8% of Welsh industrial and extractives economic output and 3% of total Welsh economic output. This makes it the largest private sector contributor to economic output in Wales[27]. However, it is currently in a precarious position, with reports in July of this year[28] that the owners of the steelworks may close it down if the UK government does not help subsidise a transition to less carbon intensive furnaces. The steelworks are one of the largest energy users in the UK and the also one of the largest industrial emitters of CO2 in Wales[29].

16.5.14 CGI, the largest IT employer in South Wales, currently employs approximately 1,300 staff across four sites in Bridgend area. They have been awarded Anchor Company status by WG for their contribution to the continued economic development of Wales.

Unemployment

16.5.15 Unemployment rate is an effective measure of economic performance and can allow for spatial comparisons to be made. Table 16.8 shows unemployment rates for year ending 2020. The data tells us that unemployment rate in the local area is lower than that at both a Welsh and UK level.

Table 16.8: Unemployment rates by Spatial Area, 2020

Local*	Wales	UK
3.2	3.6	3.9

**Calculated by taking an average of the NPTCBC and BCC unemployment rates.*

Source: Annual Population Survey 2020, ONS

[27] Available from - https://researchbriefings.files.parliament.uk/documents/CBP-7317/CBP-7317.pdf. [Accessed 31/03/2023]

[28] BBC. (2022). *Port Talbot: Tata steelworks could close without subsidy deal.* Available from - https://www.bbc.co.uk/news/uk-wales-62262290 [Accessed 31/03/2023]

[29] Available from - https://www.business-live.co.uk/manufacturing/port-talbot-steelworks-offered-hundred-26045499 [Accessed 26/05/2023]

16.5.16 Employment in Wales was severely impacted by the financial recession and recovery has been slow. Between 2008 and 2012 the unemployment rate[30] in Wales rose by 2.9%. Figure 16.1 illustrates the changes in unemployment rates across the local, Welsh and UK levels between 2007 and 2020.

Source: Annual Population Survey 2020, ONS

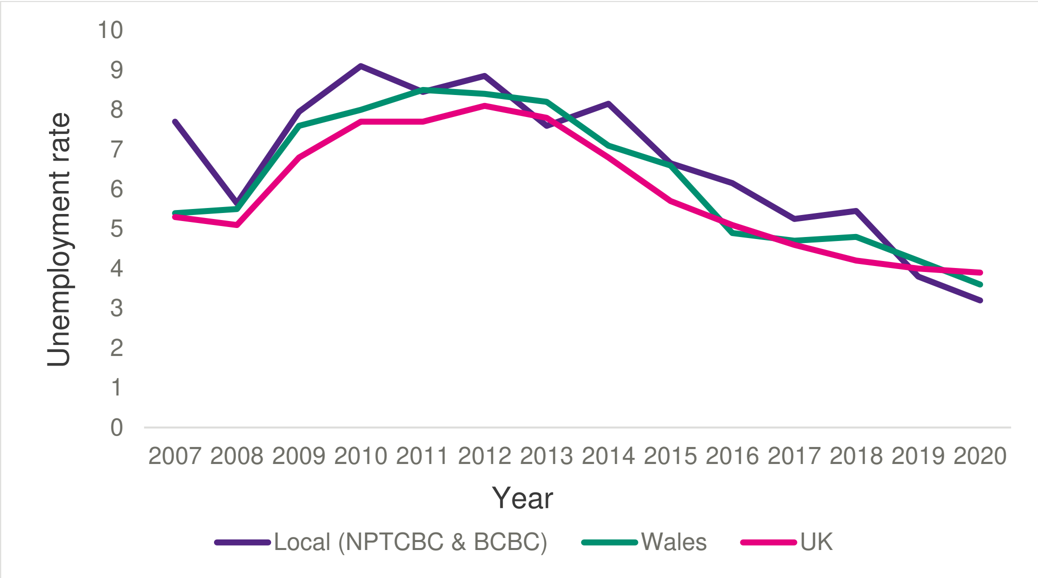

Figure 16.1: Unemployment rate, 2007 - 2020

Economic Activity Levels

16.5.17 Despite the lower unemployment levels in the local area compared to Wales, the net change in workers across the local area was -19,700, which indicates that more people commute out of the area than into the area. This suggests there is a lower level of work currently available in the local area[31].

As shown in Figure 16.2, GVA per head in NPTCBC was £17,723, 60% of the UK level. BCBC currently has a very similar GVA per head (£21,897) as to Wales (£22,021), and a value roughly 75% of the UK level. The graph illustrates the similarities between GVA per head at the local level compared to the Welsh and UK levels.

Source: Regional Accounts 2019, ONS

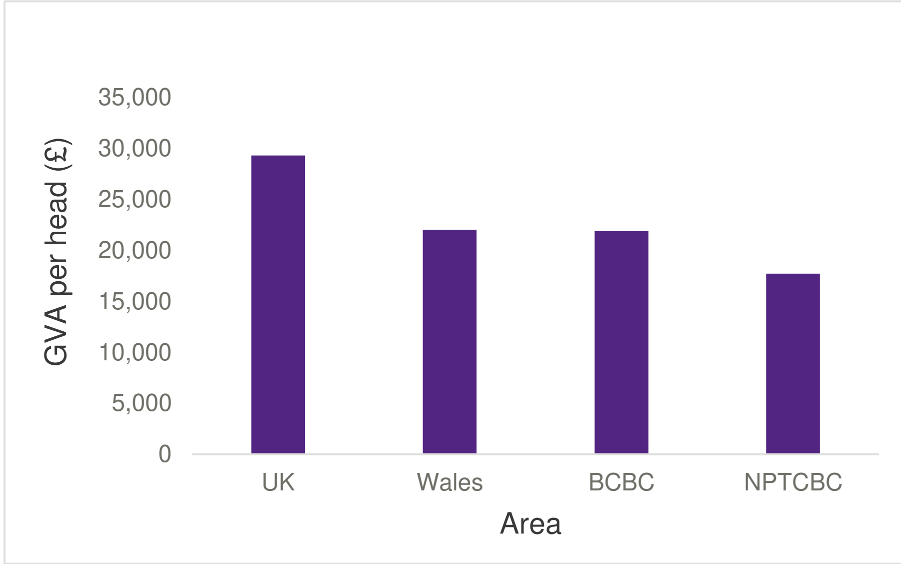

Figure 16.2 GVA per head, 2019

16.5.18 In the local area, Gross Disposable Household Income (GDHI) per head was £14,971 in 2017, the lowest within the south-west region of Wales and the third lowest across the whole of Wales[32].

16.5.19 In the local area, the median gross weekly earnings of full-time employees in 2020 was £530.65, slightly lower than that of Wales and GB, at £541.50 and £586.80 respectively[33].

Deprivation

16.5.20 The Welsh Index of Multiple Deprivation (WIMD)[34] is an official WG measure of deprivation in Wales, measured across small geographic areas called Lower Super Output Areas (LSOA). Deprivation in each LSOA is measured across several different indicators, and the LSOA is also given an overall ranking, from 1 (most deprived) to 1,909 (least deprived).

16.5.21 The proposed development is located across nine LSOAs, details of which are in the Table 16.9.

Table 16.9: LSOAs that fall within proposed development site boundary

LSOA Name	Local Authority	Overall ranking	Category
Caerau (Bridgend) 4	Bridgend	232	20% most deprived
Maesteg West 3	Bridgend	287	20% most deprived
Cymmer (Neath Port Talbot) 1	Neath Port Talbot	398	30% most deprived

[30] Welsh Government. (2023). *ILO unemployment rates by Welsh local areas and year*. StatsWales. Available from - https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Unemployment/ILO-Unemployment/ilounemploymentrates-by-welshlocalareas-year. [Accessed 31/03/2023]

[31] Welsh Government. (2022). *Commuting patterns by Welsh local authority and measure.* Available from - https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Commuting/CommutingPatterns-by-WelshLocalAuthority-Measure. [Accessed: 05/08/2022]

[32] Welsh Government. (2019). *Gross Disposable Household income by measure, Welsh economic region and year.* Available from - https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/Regional-Accounts/Household-Income/HouseholdIncome-by-Measure-WelshEconomicRegion-Year. [Accessed 31/03/2023]

[33] Welsh Government. (2022). *Average (median) gross weekly earnings by Welsh local areas and year (£).* Available from - https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Earnings/medianweeklyearnings-by-welshlocalareas-year. [Accessed 31/03/2023]

[34] Welsh Government. (ND). *Welsh Index of Multiple Deprivation.* Available from - https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation#:~:text=The%20Welsh%20Index%20of%20Multiple,to%201%2C909%20(least%20deprived). [Accessed 31/03/2023]

LSOA Name	Local Authority	Overall ranking	Category
Tai-bach 1	Neath Port Talbot	523	30% most deprived
Caerau (Bridgend) 5	Bridgend	632	50% most deprived
Bryn and Cwmavon 1	Neath Port Talbot	909	50% most deprived
Maesteg West 1	Bridgend	1150	50% least deprived
Llangynwyd 1	Bridgend	1367	50% least deprived
Margam 2	Neath Port Talbot	1487	50% least deprived

16.5.22 In the wider areas of the LPAs in which the proposed development is located, 15% of the 91 LSOAs in NPTCBC area are categorised as within the 10% most deprived LSOAs in Wales, while 7% of the 88 LSOAs in the BCBC area fall within this category.

Tourism

16.5.23 Tourism is an important element in the social, economic, environmental and cultural well-being of Wales, from major cities to rural areas, many of which depend on the industry for jobs and infrastructure. Tourism related spending can directly support economic activity across Wales's key sectors, especially spending by the public sector and the large number of tourism enterprises spending on information and communication, technology, construction, creative industries, financial and professional services, and spending by visitors (and employees) in the retail, food and beverage, and transport sectors.

16.5.24 The WG publishes data on what it terms Priority Sectors[35], including tourism. From this, it is noted that tourism related expenditure not only directly supports jobs in tourism but also supports employment in the other sectors and in the wider economy, thereby reflecting the extensive spend of tourists and tourism sector businesses. Key points from the Priority Sectors analysis include:

- The total employment in Wales for 'Tourism' is estimated to be 140,000 jobs in 2018; and
- Based on this data – it is the second largest sector behind 'Financial and Professional Services'.

16.5.25 Data published in WG's 'Welcome to Wales: Priorities for the visitor economy 2020-2025' highlighted that tourism contributed £3.064 million to the Welsh economy in 2016, 6% of total Welsh GVA[36].

16.5.26 At a local level (NPTCBC & BCBC area), tourism supported approximately 9,800 jobs in 2019, equivalent to approximately 6% of Wales as a whole supporting approximately 154,000[37].

16.5.27 Specific tourism-based assets in the NPTCBC and BCBC areas that could potentially be affected by the proposed development include the following:

- Afan Valley Adventure Park – a proposed development near Croeserw and Cymmer, granted planning permission in November 2022 with the aim to open in 2026. The development is an adventure resort that provides facilities to support activities such as mountain biking, climbing and hiking. These will include lodges, a hotel and spa, restaurants, shops, and buildings associated with adventure activities. The developer plans to employ up to 1000 staff, mainly from the local area;
- Rheola House Project – A development partnership between NPTCBC and the current owners of the Rheola estate, located on the outskirts of Resolven. A submitted planning application is based on a residential development providing funding for further development on the estate to support the growth of leisure and tourism. This would include holiday cabins and a leisure complex that would be available to both residents of Rheloa and also the wider public;
- Margam Country Park – A Grade I registered park of around 850 acres country park estate in Margam, containing several grade 1 listed buildings as well as hosting a range of other activities such as a children's adventure park, Go Ape Treetop Adventures, weddings, and several different outdoor leisure activities. A significant existing tourism asset in the local area;
- Afan Forest Park and Glyncorrwg Mountain Bike Centre – a forest park located in the Afan valley featuring 130km of mountain bike and hiking trails. Contains two centres to support leisure activities in the park: the Afan Forest Park Visitor Centre and the Glyncorrwg Mountain Bike Centre, both of which contain cafes and bike shops, with the latter also hosting a campsite;
- Aberavon seafront – A sandy beach in Port Talbot that stretches almost 3 miles, making it one of Wales' longest beaches. The beach itself is popular with a wide variety of leisure users, and the beachfront has been redeveloped to include a piazza, skate park, adventure playground and public toilets;
- Bryngarw Country Park – A Grade II listed Historic Park and Garden of around 120 acres containing a Grade II listed building, cycle trails, a visitor centre and adventure playground; and
- Kenfig National Nature Reserve (NNR) – a designated Site of Special Scientific Interest (SSSI), Kenfig NNR is a sand dune reserve that shelters a wide variety of rare and endangered species of plants and animals.

16.6 ASSESEMENT OF POTENTIAL EFFECTS

Direct Economic Effects During the Development and Construction Phase

16.6.1 This section analyses the potential economic effects during the development and construction phases of the proposed development, including direct employment, supplier effects and income effects (in terms of GVA impact). These effects will differ in their scale, duration and geographic coverage.

Impacts from Construction Activities

16.6.2 Whilst long-term significant effects of wind farms on tourism during operation are considered unlikely (as outlined above in the Evidence Base), there is the possibility that short-term restrictions to access into the site, which hosts a number of PRoW, mountain biking trails, and is generally open access, may have highly localised impacts on certain local businesses if not suitably mitigated for. In particular, mountain biking trails within Penhydd forest, forming part of the Afan Forest Park complex, connect to a visitor centre, bike hire and tea rooms at Cynonville, and the extent of their availability during construction may have an impact on footfall here and in other mountain bike or more general tourism related businesses (e.g. bike shops, bed and breakfasts/ holiday cottages, cafes and pubs etc.). However, as can be seen from Figure 15.2a, there are no shortage of public rights of way available within even the very local area outside of the site boundary, with mountain biking trails also throughout the Natural Resources Wales (NRW) managed forests immediately to the north of Cynonville forming the geographically larger

[35] Welsh Government. (2018). *Priority sector statistics: 2018.* Available from - https://gov.wales/priority-sector-statistics-2018. [Accessed 31/03/2023]

[36] Welsh Government. (2020). *Welcome to Wales: Priorities for the visitor economy 2020 – 2025.* Available from - https://gov.wales/sites/default/files/publications/2020-01/welcome-to-wales-priorities-for-the-visitor-economy-2020-to-2025-summary.pdf. [Accessed 31/03/2023]

[37] Welsh Government. (ND). *Employee jobs in tourism-related industries by area and year.* StatsWales. Available from - https://statswales.gov.wales/Catalogue/Business-Economy-and-Labour-Market/People-and-Work/Employment/Jobs/Employees-Only/Business-Register-and-Employment-Survey-SIC2007/employeejobsintourismrelatedindustries-by-area-year. [Accessed 31/03/2023]

part of Afan Forest Park. It is considered likely therefore that there is ample capacity within the existing local recreational infrastructure for any temporarily displaced activity to be absorbed without causing wider relocation.

16.6.3 While some degree of closure of routes and limitation of access is unavoidable, such efforts and measures as can be made to maximise the availability and viability of recreational infrastructure within the forests should be secured under the Access Management and Enhancement Plan (AMEP) to be approved by the local authorities and NRW (as land manager) prior to the start of construction.

16.6.4 It is considered unlikely in the professional judgement of Natural Power that significant effects would arise for local businesses during construction.

Impacts from Investment

16.6.5 The proposed development will also present job opportunities at a local, Welsh and UK level throughout the life cycle of the project; specific numbers are presented.

16.6.6 In the development phase, Natural Power has been appointed as the lead EIA consultants. The EIA has been managed from its Welsh office in Aberystwyth, which employs 10 people at this location. As well as those consultants listed in Table 1.4 of Chapter 1, other Welsh businesses engaged in working on the development have included wind monitoring mast suppliers/installers (Dulas Ltd), public relations (Thirty47 Ltd), and various legal and professional agents involved in aspects of land acquisition.

16.6.7 Should the proposed development be granted consent, employment opportunities will be available during the planning condition discharge stage and continue through to the construction phase, with opportunities for local contractors. Further positive supply chain impacts on local, Welsh and UK levels are also expected.

16.6.8 The following method for sourcing the direct economic effects during the development and construction phase is grounded on RenewableUK research[38], carried out by BiGGAR Economics in 2015, to discover the economic impacts of onshore wind. No adjustment for inflation has been applied to the 2015 figures as nationally published figures are not sector specific, however it is recognised that inflationary increases will have applied to elements of expenditure at all project stages.

16.6.9 Based on the research, the total cost of development per MW installed ranged from £11,000 to over £700,000. The applicant, based on previous similar projects, has estimated the development expenditure (DEVEX) for an onshore wind farm to be £14,550 per MW, in line with the RenewableUK research. Thus, using the applicant's estimated figure provides a total DEVEX for the proposed development (129.6 MW) of £1.89 million.

16.6.10 The RenewableUK research estimated the average construction cost per MW in 2015 to be around £1.32 million, with the majority being within ±15% of this figure. The applicant, based on more recent similar projects, has estimated the construction expenditure (CAPEX) for an onshore wind farm as being around £1 million per MW owing to significantly increase in turbine capacities since 2015. This is slightly lower than the range provide in the RenewableUK published research but is considered more realistic than the 2015 published data. Thus, using the applicant's estimated figure provides a total CAPEX for the proposed development of £129.6 million.

16.6.11 The RenewableUK research has previously given an indication for how these total expenditures would be apportioned geographically, finding that on average the majority, 98%, of DEVEX spend is in the UK, including 13% spent in the local area and 59% spent at a regional level (i.e. Welsh). On average, 47% of CAPEX was spent in the UK, 36% at the regional (i.e. Welsh) level and 12% at the local level. These figures can be extrapolated for the proposed development using the total DEVEX (£1.89 million) and CAPEX (£129.6 million) estimates for the proposed development. Table 16.10 summarises the development and construction costs across each area.

Table 16.10: Development & Construction Costs

Spatial Area	% of Total Development Spend	£ Equivalent (Development)	% of Total Construction Spend	£ Equivalent (Construction)
Local	13%	£245,138	12%	£15,552,000
Wales**	59%	£1,112,551	36%	£46,656,000
UK*	98%	£1,847,966	47%	£60,912,000

Note: Excludes non-UK DEVEX (2%) and non-UK CAPEX (53%). *The figures for UK include the Welsh figures. **The figures for Wales include the local figures.

Source: Percentage of total development and construction spend from RenewableUK/BiGGAR Economics, Page 4. Pound equivalent calculated from proposed development DEVEX, and CAPEX estimates provided by the applicant.

16.6.12 The contract data from RenewableUK's case study research assessment has been combined with turnover per employee data and ratio of GVA to turnover for relevant industries (Tables 16.11 and 16.12). These tables also show the breakdown of development and construction costs into each of the main components of work, based on the spatial areas defined in S.16.3.1. The GVA to turnover ratio in the Total row of each table is multiplied by the currency value of spend relating to the potential development in each spatial area to calculate the contribution to the economy, or GVA, of a job in that region.

Table 16.11: GVA and Employment Ratios (Development Phase)

Breakdown of components	Turnover per employee (£)	GVA / Turnover
Project development	£120,965	0.569
Legal and financial	£87,041	0.777
Environmental Impact Assessment	£101,102	0.653
Development Phase Average	£103,036	0.666

Source: RenewableUK/BiGGAR Economics Table 2. Data taken from ONS Annual Business Survey 2013 - 2014.

16.6.13 Table 16.12 shows that the balance of plant contracts account for 28.6% of spend in the construction phase. The turbine contracts for manufacture, assembly and transport account for the majority of the value of the construction contracts, accounting for 64.4% whilst the grid connections account for 7.1%. Therefore, the weighted average for construction shows there is one employee per £137, 942 in turnover and a GVA/Turnover rate of 0.432.

Table 16.12: GVA and Employment Ratios (Construction Phase)

Indicator	Turnover per employee (£)	GVA / Turnover	% of Spend
Balance of Plant Contract	£150,194	0.458	28.6%
Turbine Contract	£129,672	0.422	64.4%

[38] RenewableUK. (2015) *Onshore Wind: Direct and Wider Economic Benefits.* [Online]. Available from - https://cdn.ymaws.com/www.renewableuk.com/resource/resmgr/publications/reports/onshore_economic_benefits_re.pdf [Accessed 26/05/2023]

Grid Connection Contract*	£163,802	0.419	7.1%
Construction Phase Average	£137,942	0.432	100%

Source: RenewableUK/BiGGAR Economics Table 6. Data taken from ONS Annual Business Survey 2013, 2014.

16.6.14 The applicant's estimated DEVEX lies within, and CAPEX is only just under, the estimates included in the RenewableUK research, accounting for increased turbine capacities, therefore we have applied the assumptions set out in Table 16.11 and 16.12 to provide an estimate on the level of employment at both the development and construction phases.

16.6.15 At the development stage, the level of employment at the Welsh level for the proposed development (129.6 MW) is estimated to be around 11 jobs, contributing £740,959 in GVA (see Table 16.13). Throughout the construction phase, the proposed development could sustain 338 jobs, contributing £20.16 million in GVA (see Table 16.14).

16.6.16 At the local level, the development phase of the proposed development could sustain up to 2 jobs and contribute £163,262 in GVA (see Table 16.13). In the construction phase the proposed development could sustain up to up to 113 jobs and contribute £6.72 million in GVA (see Table 16.14).

Table 16.13: Economic impact of the proposed development (Development Phase)

Spatial Area	Jobs	GVA (£)	Turnover (£)
Local	2	£163,262	£245,138
Wales	11	£740,959	£1,112,551
UK	18	£1,230,745	£1,847,966

Source: Natural Power

Table 16.14: Economic impact of the proposed development (Construction Phase)

Spatial Area	Jobs	GVA (£)	Turnover (£)
Local	113	£6,718,464	£15,552,000
Wales	338	£20,155,392	£46,656,000
UK	442	£26,313,984	£60,912,000

Source: Natural Power

16.6.17 Although construction impacts are usually one-off in nature, they will last up to 24 months and therefore will have a meaningful benefit to the local economy. The forecasted scale of employment and GVA impact during the construction phase can be seen as having a positive effect on both the local and Welsh economies. It is also expected that during the construction phase there will be positive impacts on the local hospitality sector with construction site workers residing in accommodation locally to the site, using local shopping and catering facilities, local garages etc.

16.6.18 The supply chain, or indirect impacts, are also likely to benefit from the proposed development as construction activity typically has strong beneficial cascading effects with other sectors such as, building, manufacturing etc and therefore lead to job creation elsewhere in the local economy.

16.6.19 On this basis, the effect of spending on construction and development contracts was assessed as **minor** (beneficial) and not-significant for NPTCBC and BCBC areas, and **negligible** (beneficial) for outside these areas (Wales and UK) when considering the baseline employment statistics (Table 16.4), and not significant in the professional judgment of Natural Power.

Direct Economic Effects During the Operation and Decommissioning Phases

16.6.20 This section analyses the potential economic effects during the operation phase of the wind farm including direct employment, supplier effects and income effects (in terms of GVA impact). These effects will differ in their scale, duration and geographic coverage.

16.6.21 Decommissioning effects of the proposed development have not been assessed due to uncertainties surrounding the future value of such effects some 50 years on.

16.6.22 The method presented for sourcing the direct economic effects during the operational phase is grounded on the same RenewableUK research as described above.

16.6.23 According to the research, the annual cost of operations and maintenance per MW installed ranges from £23,000 to £130,000 per annum. The operations and maintenance costs are affected by the size of development, land contracts and whether turbines are still under warranty. The applicant, based on previous similar projects, has estimated the operational expenditure ('OPEX') for onshore wind as being around £70,000 per MW per annum, in line with the RenewableUK research. Thus, using the applicant's estimated figure provides a total OPEX for the proposed development of £9.072 million per annum.

16.6.24 The RenewableUK research has previously given indication for how this total cost would be apportioned geographically. The vast majority, 87%, of operation and maintenance spend is in the UK, of which 42% spent in the local area and 58% spent at a Welsh level.

16.6.25 Table 16.15 summarises the operation and maintenance costs across each spatial area based on the total OPEX, £9.072 million, calculated for the proposed development.

Table 16.15: Operational costs per annum

Spatial Area	% of Spend	£ Equivalent per annum
Local	42%	£ 3,810,280
Wales	58%	£ 5,261,760
UK	87%	£ 7,892,640

Note: Excludes non-UK OPEX (13%) *The figures for UK include the Welsh figures. **The figures for Wales include the local figures.

Source: Percentage of total development and construction spend from RenewableUK/BiGGAR Economics, Page 4. Pound equivalent calculated from proposed development OPEX estimates provided by the applicant.

16.6.26 The contract data from the case study assessment (i.e. turnover data) has been combined with turnover per employee data and ratio of GVA to turnover for relevant industries (Table 16.16). This table also shows the breakdown of operation and maintenance costs into each of the main components of work, based on the case study data.

Table 16.16: GVA and Employment Ratios

	Turnover per employee (£)	GVA / Turnover	% of Spend
Turbine Maintenance	£154,923	0.364	31%
Site Maintenance	£109,844	0.440	6%
Operational Management	£122,500	0.584	11%
Land Agreements	£49,744	0.360	14%
Habitat Management costs	£83,600	0.337	0%
Non-domestic rates (business rates)	n/a	0.500	6%
Community Benefit	£47,967	0.342	7%
Other (Average)	£86,741	0.418	24%
Operations & Maintenance Total	£121,935	0.430	100%

Source: RenewableUK/BiGGAR Economics Table 9. Data taken from ONS Annual Business Inquiry 2010

16.6.27 As the applicant's estimated OPEX lies within the estimates included in the RenewableUK research we have applied the assumptions set out in Table 16.16 to provide an estimate of the level of employment at the operational phase. This gives the level of employment at the Welsh level for the operational phase of the proposed development as 43 jobs, contributing £2.26 million in GVA. At the local level the operation phase of the proposed development is expected to sustain 31 jobs, contributing £1.64 million in GVA (See Table 16.17).

Table 16.17: Economic impact of the proposed development (Operation)

Spatial Area	Jobs	GVA (£)	Turnover (£)
Local	31	£1,638,420	£ 3,810,280
Wales	43	£2,262,557	£ 5,261,760
UK	65	£3,393,835	£ 7,892,640

Source: Natural Power

16.6.28 The effect of expenditure on operations and maintenance contracts is therefore considered as **negligible** (beneficial) with respect to NPTCBC and BCBC economies and **negligible** (beneficial) and not-significant with reference to the Welsh and UK economies as a whole, in the professional judgment of Natural Power.

16.6.29 The forecasted scale of employment and GVA impact during the operational phase can be seen as having a positive effect (albeit not significant) on both the local and Welsh economies.

Effects on Tourism Receptors

16.6.30 It is acknowledged that tourism makes a significant contribution to the economic development of both NPTCBC and BCBC areas, and that both councils have made tourism a focus of their economic regeneration initiatives. BCBC cabinet recently approved a new Destination Management Plan (DMP) covering 2022 – 2027[39], while an update to the NPTCBC Regeneration and Sustainable Development Cabinet Board in January 2022 highlighted the initiatives the council has been pursuing to develop tourism in the region.

16.6.31 An overview of the nature of potential impacts on identified receptors are set out:

- Afan Valley Adventure Resort (AVAR) – on the basis of bare-earth zone of theoretical visibility (ZTV) modelling, turbines from the proposed development would be visible from along the southern boundary of the AVAR site, predominantly contained within an area identified in the May 2017 'Parameters Plan' as forming 'structural landscaping (predominantly evergreen)'. There are pockets of lesser theoretical visibility from within areas of 'Alpine Lodges' in the east of Y Bryn site boundary, 'X-Sports Lodges', 'X-Sports Village' and 'Trax & Trails Lodges' in the west. However, it is a reasonable expectation that the combination of the general north-facing aspect of the site, structural landscaping around the southern boundary of the site, together with other built environment and internal soft landscaping/ treescaping, would significantly reduce visibility of the proposed development. Furthermore, having regard to the existing cumulative visibility figures (Figures 8.1 – 8.4 of Chapter 8), and NPTCBC's 2018 recommendation report[40]which notes that "wind turbines are prominent throughout the landscape", it is clear that the AVAR site will already be subject to far higher visibility of other existing and consented schemes, notably Pen y Cymoedd and Foel Trawsnant;
- Rheola House Project – the ZTV mapping shows there would be no visibility of the proposed development from this receptor;
- Margam Country Park – as addressed in Chapters 8 and 9, the ZTV mapping, visualisations and 3D computerised model indicate that there would be some visibility of turbines from around the park. Up to 7 turbines would be glimpsed briefly on the modern driveway entrance to the park, before becoming largely invisible from the car park and onwards through the conservation area towards the house. There would be some visibility from the grassland to the south of the house (illustrated in Figure 8.61f), and greater visibility from the elevated deer park area above Brest Plantation (illustrated in Figure 8.52f). Besides having a visual impact, there are no other direct or indirect impacts to the tourism interests of the park, including the café, Go Ape facilities, mountain biking infrastructure, and proposed zip-wire;
- Afan Forest Park and Glyncorrwg Mountain Bike Centre – as addressed in Chapter 8, the ZTV mapping indicates that there would be visibility of the proposed development from parts of the forest park, however this would be for the most part matched or dwarfed by the degree of visibility of other schemes, notably Pen y Cymoedd. The only exception being those trails residing within Penhydd forest, which is host to the northern section of the proposed development. Whilst there would be some temporary impacts from closure of part of the Penhydd trail during construction (mitigated by a readily available diversion), following this there would be no direct impacts on trails and indeed the Applicant is committed to delivering a range of enhancement measures that should provide benefit;
- Aberavon seafront – the proposed development would be seen looking inland from the seafront, over the built environment of the town and in context of the existing Mynydd Brombil wind turbines and Mynydd Emroch solar farm (see viewpoint 16 for illustration). There would otherwise be no other direct or indirect impacts;
- Bryngarw Country Park – whilst ZTV mapping suggests that up to 13 turbines may be visible from one pocket of the western edge of the park, dense vegetation is presumed likely to near totally obscure any visibility of the proposed development at over 8km distance. There would otherwise be no other direct or indirect impacts; and

[39] Bridgend County Borough Council. (2022). *Cabinet approves the 2022 to 2027 Tourism Plan for the borough.* Available from - https://www.bridgend.gov.uk/news/cabinet-approves-the-2022-to-2027-tourism-plan-for-the-borough/ [Accessed 31/03/2023]

[40] https://democracy.npt.gov.uk/documents/s45673/Afan%20Valley%20Adventure%20Resort.pdf [Accessed 21/02/2023]

- Kenfig NNR – the proposed development would be seen looking inland, sat above the Brest Plantation, along the ridgeline from the existing Mynydd Brombil wind turbines, and in context of other built environment including high-voltage overhead pylons, the M4 motorway corridor, Port Talbot steelworks and town. There would otherwise be no other direct or indirect impacts.

16.6.32 Evidence referenced in the Wind Farms and Tourism sub-section of this chapter's Evidence Base (Paras 16.4.38 – 16.4.44) shows that there is no demonstrable correlation between the development of wind energy and negative impacts on tourism. Indeed, Whitelee, the UK's largest on-shore windfarm, has become a visitor attraction itself, particularly among walkers, mountain bikers and runners. Locally, there is no evidence known to the applicant – including from any local authority - for any of the other operating wind farms in the area, including the 76 turbine Pen y Cymoedd, having any deleterious effect on local tourism receptors.

16.6.33 The effect on the tourism receptors listed above is therefore considered minor and not significant.

Effects Arising from Infrastructure Improvements, Potential Community Benefits and Shared Ownership

16.6.34 This section analyses the effects arising from infrastructure improvements and potential community benefits and shared ownership.

16.6.35 The proposed development is offering community benefit payments via a community benefit fund to the surrounding communities. This positively contributes to Strategic Aim 5 within the Swansea Bay City Region Economic Regeneration Strategy described at the start of this chapter. The fund will be worth £8,000 per MW, per year and is proposed to be delivered using a 'community development trust' model, which would allow the opportunity to provide grants upon applications as well as proactively seek opportunities based on community need in terms of current and future well-being. Therefore, this fund could worth up to £1.04 million per year for the lifetime of the project and could be put towards achieving placemaking and other community identified priorities. It is also worth noting that the proposed development is seeking consent for up to 50 years. Assuming a conservative discount rate of 8%, this would give a net present value of £12.7 million.

16.6.36 The proposed development is proposing to offer a shared ownership of up to 20% of the total CAPEX, via a net revenue model, indicatively comprising 10% for local individuals/community groups and the other 10% for local public sector bodies (i.e. NPTCBC and BCBC) to invest in.

16.6.37 The applicant is also proposing to create the 'Awel y Bryn Co-Op' which could be established by Awel Aman Tawe, Neath Port Talbot Council for Voluntary Service ('NPTCVS') and Bridgend Association of Voluntary Organisations ('BAVO'), to manage both the benefit funds and shared ownership opportunity together in a coordinated manner.

16.6.38 The applicant is also committed to delivering a range of enhancement measures for mountain biking infrastructure (see Chapter 15), in alignment with NPTCBC's tourism development aims which include to '*improve mountain biking facilities and trails in South Wales as a key driver for economic development in the region.*'

Potential to Contribute to the South Wales Industrial Cluster

16.6.39 Whilst there are no firm plans at present, the applicant is also in discussions with key stakeholders forming the South Wales Industrial Cluster ('SWIC') project, which aims at decarbonising key heavy industry across south Wales predominantly through the substitution of renewable energy sources. The proposed development's contribution, currently being explored, could include providing a private-wire and conventional power purchase agreement ('PPA') to local energy intensive industry, together with the option to supply a feed of hydrogen from a separate stand-alone electrolyser project which is currently at a feasibility stage. Were such a concept proposal to come to fruition then the wider economic benefits of securing the net-zero viable future of a large employer and key economic contributor to Wales would be considerable.

Mitigation and Management Measures

16.6.40 This section considers the mitigation and management measures which could be implemented to minimise any negative impacts and maximise potential positive impacts.

16.6.41 The assessment reveals no detrimental significant residual socioeconomic impacts from the proposed development. Instead the analysis shows that there will be detectable employment related benefits, particularly so in the local area, associated with the proposed development.

16.6.42 In terms of tourism, as highlighted in the BiGGAR Report, wind farm development has not resulted in a serious negative economic impact on tourism, with even wider positive impacts being seen. The proposed development could provide benefits, such as improved mountain biking trails and infrastructure, which would draw in more tourists and thus support the local tourism business.

16.6.43 To ensure local socioeconomic benefits are maximised, the applicant proposes to engage with the local and business communities to outline the range of opportunities, both direct through contracts for construction and operation, through to indirect opportunities in the hospitality sector. This will be done through a 'Meet the Buyer' event described in more detail in Sub-Section 16.5.47.

16.6.44 It is planned to try and maintain as much public access into the forests during construction as possible, however, there may be periods of time where due to construction activity some areas may be placed out of bounds to ensure public safety. Temporary diversions of rights of way may be required and where this isn't possible any temporary closures will be communicated in advance in consultation with the local authority. This is further discussed in Chapter 15: Aviation and Existing Infrastructure of the ES.

16.6.45 The applicant is aware of various local heritage assets and points of interest across the site, and where possible, and agreed with statutory consultees, they will look at providing new and enhanced local heritage information, providing additional details about currently non-obvious heritage features, and improving access or educational walking routes. Another proposal being explored is the creation of an interactive smart-phone visitors app, drawing historical references from local sources.

Maximising Local Economic Content

16.6.46 A key aim of the applicant, as expressed to WG at the time when the development site was made available to tender, is to seek to maximise local and Welsh economic content spend. A local suppliers database has been established, with invitations being sent to local businesses to attend the public exhibition days, with a number visiting and making contact with the applicant since.

16.6.47 If the proposed development is consented, one of the first steps the applicant will undertake is to arrange, together with local authority business development and employment teams, a number of 'Meet the Buyer' events. These will be an organised and advertised events that will invite local businesses and trades people to come and speak to the applicant, so that local employers can understand the opportunities available, and the applicant can understand the services offered and advise on its procurement process. The applicant will then form a register of interest, and this will be transferred to the key contractor to enable them to utilise local services. The applicant will also use it within its project team for ascertaining things like availability of local accommodation such as B&Bs.

16.7 SUMMARY AND CONCLUSIONS

16.7.1 When researching the socioeconomic baseline, the following factors were apparent:

- The local economy has experienced a net outward migration of people in pursuit of employment opportunities, thus restricting current local economic growth;
- Production and construction are key local employers, with Tata's Port Talbot Steelworks being a key critical strategic employer and economic contributor to Wales as a whole;

- In Bridgend, IT company CGI contributes widely to the local employment and is continuing to invest in skilled jobs within the region;
- Tourism is of growing importance to the local economy; and
- Broadening the economic baseline and enhancing economic output in the local area will help create a virtuous cycle for the local area whereby improving the economy would lead to further desirable occurrences such as a surge in home purchases which then further leads to more favourable outcomes, such as more construction, and so on.

16.7.2 The proposed development has the potential to offer positive socioeconomic benefits to the UK, to Wales and locally.

16.7.3 The proposed development can play an important role in supporting continued economic restructuring and fuelling economic recovery and future prosperity. It will provide investment and job opportunities for local people, whilst maintaining current levels of employment.

16.7.4 The proposed development has the potential to create job opportunities throughout the development, construction and operational phases. As per the ONS' low carbon and renewable energy economy, UK 2019 survey[41], it was estimated that 202,100 full-time equivalent jobs were supported by the UK's low carbon renewable energy sector and supply chain. These employment opportunities will be created during the lifecycle of the project and foster their diversification into new industries.

16.7.5 In terms of development impact, of the estimated £1.89 million wind farm DEVEX, there is the potential for £245,138 to benefit the local economy and £1,12,551 to benefit the Welsh economy. The development phase is estimated to create or sustain 11 jobs in Wales, contributing £740,959 in GVA. At the local level this correlates to 2 jobs and a contribution of £163,262 in GVA.

16.7.6 Throughout the construction phase, out of the £129.6 million wind farm CAPEX there is the potential for £15.55 million to benefit the local economy and £46.66 million to benefit the Welsh economy. Using industry assumptions provides an estimate of 338 number of Welsh jobs created, contributing £20.16 million in GVA, with an estimated 113 number of local jobs created, contributing £6.72 million in GVA.

16.7.7 The operation and maintenance phase is also expected to generate economic impacts. Applying the data from the RenewableUK research provided an estimate of £9.07 million turnover in the UK associated with the proposed development. Of this, £3.81 million could benefit the local economy and £5.26 million could be inserted into the Welsh economy on an annual basis. Applying the industry assumptions the proposed development is also expected to create the equivalent of 43 Welsh jobs, contributing £2.26 million in GVA and 31 local jobs, contributing £1.64 million in GVA per annum.

16.7.8 The proposed development will also help support community initiatives in the surrounding areas.

16.7.9 If granted permission, the proposed development will significantly contribute to meeting carbon reduction and renewable energy generation targets set out by the Welsh and UK Governments.

16.7.10 The proposed development positively contributes to the Well-being of Future Generations (Wales) Act 2015 by contributing to the three goals within the Act highlighted in paragraph 16.4.7. Specifically it will provide added capacity to adapt to climate change, both at a regional and global level, by reducing the use of fossil fuels through provision of clean, renewable energy.

16.7.11 The proposed development supports the aims of the Bridgend County Borough Economic Strategy and will provide skilled jobs in the future economy as well as contribute to the county's low carbon economy by creating a source of renewable energy.

[41] Available from - https://www.ons.gov.uk/economy/environmentalaccounts/bulletins/finalestimates/2019. [Accessed: 05/08/2022]

16.7.12 The proposed development supports the aims of the Swansea Bay City Region Economic Strategy and will provide skilled jobs for those living in the area during construction and operational phases of the proposed development. The full-time jobs created by the proposed development will help overcome the challenge stated in the Swansea Bay City Region Economic Strategy that unemployment and economic inactivity remain too high. Meet the Buyer Events will help enrol local services to the proposed development. This will contribute positively to the objective of maximising job creation by having a strong focus on delivering major employment-creating schemes.

16.7.13 At both a Welsh and local level, this chapter has highlighted the importance of tourism as a source of income and employment opportunity. Going from the recently published report from BiGGAR Economics, where the tourism sector is also a significant contributor to employment in Scotland, it is concluded that the proposed development is highly unlikely to affect the trends in tourism employment. Thus, it poses no significant threat to the local tourism sector or specific assets within the NPTCBC and BCBC areas, nor that of Wales as a whole.

16.7.14 The following features of the proposed development help support specific goals contained in the Well-being of Future Generations (Wales) Act 2015[42], as described below:

- Predicted effects on local and Wales based employment during all phases of lifecycle of the proposed development, as well as 'Meet the Buyer' events, support the Prosperous Wales goal – '*An innovative, productive and low carbon society…which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.*';
- An AMEP that will mitigate the potential construction effects on local tourism related business, especially those linked with outdoor recreation, supports the Healthier Wales goal – '*A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood*'; and
- A community benefit fund supports the More Equal Wales goal – '*A society that enables people to fulfil their potential no matter what their background or circumstances (including their socioeconomic circumstances)*'.

16.7.15 It is therefore concluded that the proposed development will result in a net economic benefit to the surrounding area, to both hosting local councils and to the country as a whole. As with other impacts, the magnitude of economic change relative to a do-nothing baseline will be greatest within the local area and be increasingly diluted by geography moving from the site to the national level.

The significance of economic impact during development and construction phases of the proposed development is predicted to be **minor** (beneficial) and not-significant for NPTCBC and BCBC areas, and **negligible** (beneficial) for outside these areas (Wales and UK). During the operational phase, the significance of socioeconomic impact is predicted to be **negligible** (beneficial) with respect to NPTCBC and BCBC economies and **negligible** (beneficial) and not-significant with reference to the Welsh and UK economies as a whole, in the professional judgment of Natural Power.

[42] *Well-being of Future Generations (Wales) Act 2015.* Available from - https://www.legislation.gov.uk/anaw/2015/2/contents/enacted [Accessed 31/03/2023]