

## 7 SOCIO-ECONOMICS

### 7.1 Introduction

7.1.1 This chapter has been produced by Hardisty Jones Associates (HJA) and presents the approach and findings of the assessment of potential effects on socio-economic receptors. It firstly presents the methodology, then provides a review of the existing legislative and policy position, and the baseline conditions in the vicinity of the Application Site and surrounding area. It then presents the results of the assessment of the effect of the proposed development on the baseline assessment scenarios in order to determine the anticipated magnitude and significance of effects.

7.1.2 This socio-economics chapter is an updated version that is submitted in respect of appeal reference CAS-02641-G8G7M5 in September 2024. It addresses the comments made by PEDW in its ES Completeness Report issued in June 2023. The updates in relation to socio-economic matters are:

- Review and update of Section 7.4 (Baseline conditions) utilising up-to-date data sources;
- Review and update of Section 7.6 (Cumulative effects) to include newly identified cumulative developments; and
- A general review and update of the entire chapter based on current best practice guidance.

### 7.2 Methodology and Assessment Criteria

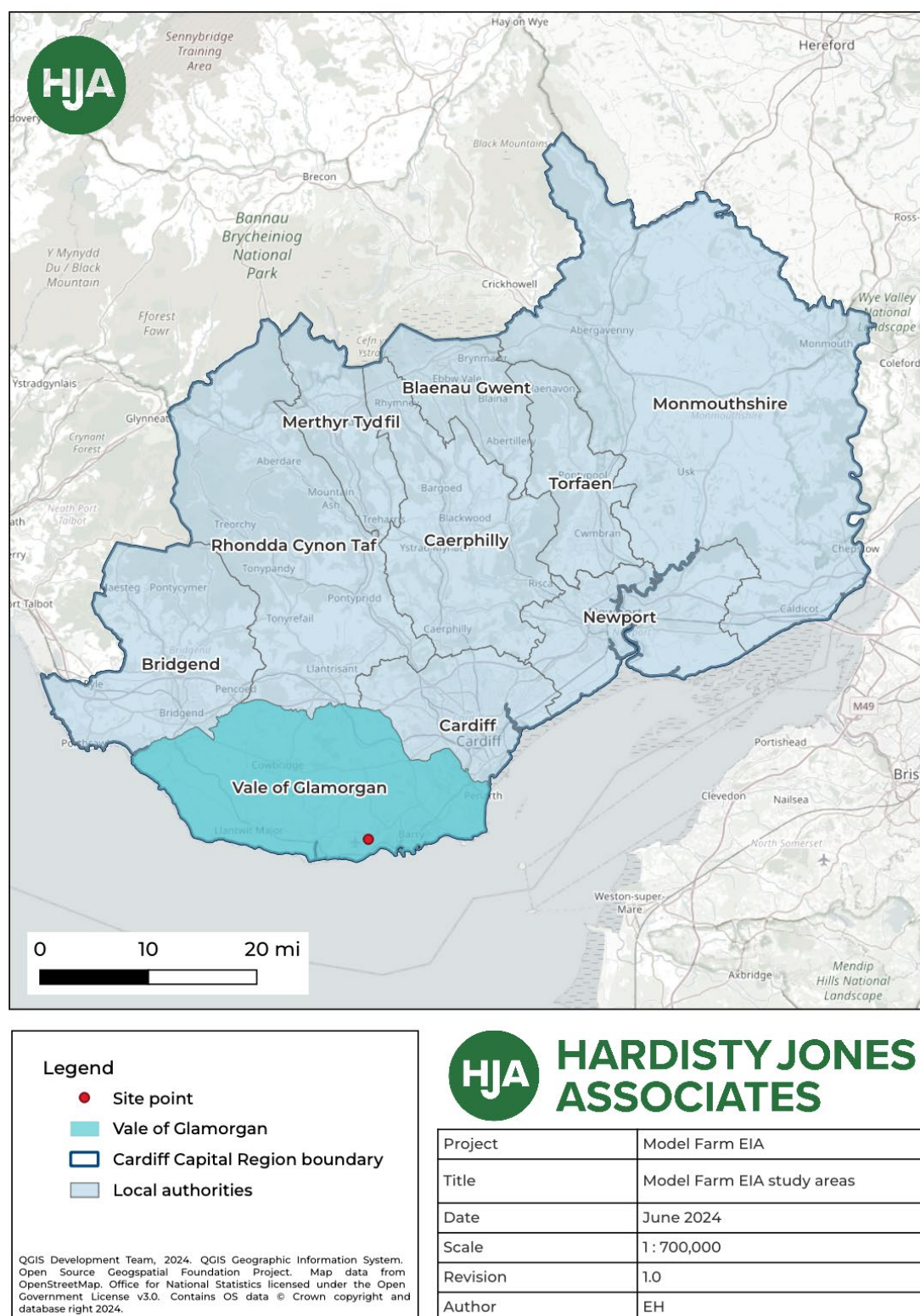
#### Geographical scope

7.2.1 The socio-economics study area for the assessment of significant effects is defined as the Vale of Glamorgan local authority area, within which the Site is located.

7.2.2 To ensure consideration is also given to the wider economic context the Proposed development will interact with, the baseline conditions and cumulative effects assessment refer to the Cardiff Capital Region (CCR).

7.2.3 Both the Vale of Glamorgan local authority and CCR are shown in Figure 7.1

**Figure 7.1 – Socio-economics study area and wider economic context**



## Predicting effects

- 7.2.4 There are no formal measures of assessing impact significance for socio-economic receptors. There is no standard guidance that specifies the technical approach to the assessment of socio-economic effect.

7.2.5 In the absence of standard industry guidance, Glasson (2018)<sup>1</sup> serves as a useful resource to assist in setting appropriate parameters for the assessment of socio-economic effects. Glasson (2018) recommend the inclusion of the following impacts:

- **Direct economic**
- **Indirect/induced economic**
- Demographic
- Housing
- Other local services
- Socio-cultural
- Distributional

7.2.6 The absence of any residential development as part of the Proposed development removes the need to assess potential effects on demographic, housing, local services, socio-cultural and distributional receptors. Therefore, the impacts set out in bold above are taken forward for further consideration in the context of socio-economics.

7.2.7 The assessment has been carried out in line with other (non-binding) best practice guidance at both the EU level (European Commission, 2017) and from other planning jurisdictions in the UK<sup>2</sup> (Historic Environment Scotland and Scottish Natural Heritage, 2018).

7.2.8 Where the available guidance does not specify a technical approach to assessing socio-economic effects, this assessment is informed by the professional judgment of the chapter authors.

7.2.9 In light of the parameters recommended by Glasson (2018), the socio-economic receptors against which the impact of the Proposed development will be assessed are set out in Table 7.1 below.

**Table 7.1 – Summary of relevant socio-economic receptors and associated potential impacts**

Receptor	Potential impact
Construction phase	
Employment	<ul style="list-style-type: none"> <li>• Direct, indirect, and induced employment impacts in the supply chain supported by construction of employment floorspace, supporting infrastructure and preparatory works.</li> <li>• Wages supported through construction phase employment.</li> <li>• GVA output supported through construction phase capital expenditure.</li> </ul>
Operation phase	

<sup>1</sup> Glasson, J. (2018) 'Socio-economic impacts 1: Overview and economic impacts', in R. Therivel and G. Wood (ed.) Methods of Environmental and Social Impact Assessment (4th Edition). Abingdon: Routledge, pp475–514

<sup>2</sup> Historic Environment Scotland and Scottish Natural Heritage (2018) Environmental Impact Assessment Handbook: Guidance for competent authorities, consultation bodies, and others involved in the Environmental Impact Assessment process in Scotland. Historic Environment Scotland and Scottish Natural Heritage, Edinburgh

Receptor	Potential impact
Employment	<ul style="list-style-type: none"> <li>• Employment accommodated in the provision of new employment floorspace (direct employment impacts).</li> <li>• Indirect employment impacts in the supply chain, and induced employment impacts resulting from employee spend.</li> <li>• Wages generated through the employment accommodated in the new employment floorspace.</li> <li>• GVA output generated through provision of new employment floorspace.</li> </ul>

## Legislative and Policy Context

7.2.10 The legislative and policy documents that cover relevant issues ~~relating to the proposed development~~ are summarised in ~~Table 7.1~~ **Table 7.2** below.

**Table 7.1** **Table 7.2** – Summary of relevant legislative and policy documents

Title	Year	Source(s)
<b>UK</b>		
<del>UK Industrial Strategy</del>	<del>2017</del>	<del>HM Government</del>
<b>Wales</b>		
Well-being of Future Generations (Wales) Act 2015	2015	Welsh Government
Future Wales: The National Plan 2040	cc	Welsh Government
Prosperity for All: the national strategy	2017	Welsh Government
Prosperity for All: Economic Action Plan	2018	Welsh Government
Planning Policy Wales	<del>2018</del> 2024	Welsh Government
Technical Advice Note 23: Economic Development	2014	Welsh Government
People, Places, Futures – The Wales Spatial Plan	2008	Welsh Assembly Government
<b>Cardiff Capital Region</b>		
<del>Cardiff Capital Region</del> Industrial and Economic Plan	2019	<del>Cardiff Capital Region</del> <b>Economic Growth Partnership</b>
Regional Economic and Industrial Plan 2023–2028	2023	Cardiff Capital Region
Investment Prospectus: Prosperity for our Place	2021	Cardiff Capital Region
<b>Vale of Glamorgan</b>		
Local Development Plan	2017	Vale of Glamorgan Council
<del>Employment Land and Premises Study</del> 2013	<del>2013</del>	<del>Vale of Glamorgan Council</del>
Cardiff Airport 2040 Masterplan	2019	Cardiff International Airport Ltd

## Relevant Guidance

7.2.11 This assessment draws on a range of source information, including best practice guidance on economic impact (e.g. ~~Additionality Guide, Fourth Edition, HCA, 2013; Employment Density Guide, Third Edition, HCA, 2015~~).

## Study Area

- 7.2.12 This assessment considers impacts upon the site level and the Vale of Glamorgan local authority area.

## Baseline Methodology

- 7.2.13 Information on the economic baseline conditions within the Vale of Glamorgan has been collected through a detailed desktop review of existing studies and datasets. These are summarised in Table 7.2 below.

**Table 7.2 – Summary of key baseline sources**

Title	Year	Source(s)
Annual Population Survey	2018	ONS
Annual Survey of Hours and Earnings	2018	ONS
Business Demography	2017	ONS
Business Register and Employment Survey	2018	ONS
Census of Population	2011	ONS
Jobs Density	2018	ONS
Local authority population projections	2014-based	Statistics Wales
Mid-year population estimates	2018	ONS
Regional Gross Value Added	2018	ONS
Regional Gross Value Added by Local Authority	2017	ONS
UK Business Counts	2018	ONS

## Baseline Methodology

- 7.2.14 There is no established list of baseline environment indicators for economic receptors. The baseline receptors have therefore been informed by the professional judgment of HJA.
- 7.2.15 Information on the economic baseline conditions within the Vale of Glamorgan and CCR has been collected through a detailed desktop review of existing studies and datasets. These are summarised in Table 7.3 below.

**Table 7.3 – Summary of key baseline sources**

Title	Year	Source(s)
Annual Population Survey	2024	ONS
Annual Survey of Hours and Earnings	2024	ONS
Business Demography	2024	ONS
Business Register and Employment Survey	2024	ONS

2011 Census of Population	2012	ONS
Jobs Density	2024	ONS
Population estimates	2024	ONS
Regional Gross Value Added	2024	ONS
Regional Gross Value Added by Local Authority	2024	ONS
UK Business Counts	2024	ONS

## Consultation

- 7.2.16 Consultation activities have been undertaken for the proposed development. Of the key issues raised during the consultation phase, comments have been made as to the basis for calculating the number of jobs the proposed development might support. This chapter sets out the methodology for estimating economic impacts, including the number of jobs the proposed development will have capacity to accommodate. ~~None are specific to economics. Therefore, there~~ There are no key issues to be considered in the production of this Environmental Statement chapter on the basis of the consultation responses.

### Assessment Criteria and Assignment of Significance

- 7.2.17 ~~This section describes the approach taken to identifying the magnitude of an impact and the value of the receptor.~~
- 7.2.18 ~~The criteria for determining the significance of effects is a two-stage process that involves defining the value of the receptors and the magnitude of the impacts. This section describes the criteria applied in this chapter to assign values to the value of receptors and the magnitude of potential impacts. The definitions used for value and magnitude are presented in Tables 7.3 and 7.4, respectively.~~

### Receptor Value

**Table 7.4: Definitions of Value**

Value	Descriptors
High	<del>The receptor is identified as a policy priority (as a result of economic potential and/or need) and/or There is evidence that economic performance is currently facing major challenges and areas of major weakness currently exist.</del>
Medium	<del>There is evidence that economic performance is currently facing challenges and elements of weakness currently exist.</del>
Low	<del>There is evidence that economic performance is currently resilient and minimal weaknesses or challenges exist.</del>
Negligible	<del>There is evidence of good overall economic performance and no particular weaknesses or challenges exist.</del>

### Magnitude of Impact

**Table 7.5: Definitions of Magnitude**

Magnitude	Descriptors
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High	Negative	Large scale or major loss of economic resource resulting in severe damage to key economic receptors
	Positive	Large scale or major gain in economic resource, resulting in major improvement to key economic receptors
Medium	Negative	Loss of economic resource resulting in some damage to key economic receptors
	Positive	Gain in economic resource resulting in some improvement to key economic receptors
Low	Negative	Small loss of economic resource resulting in minimal damage to economic receptors
	Positive	Small gain in economic resource resulting in minimal improvement to economic receptors
Negligible	Negative	Nil or very small loss of economic resource resulting in very minor or no observable damage to economic receptors
	Positive	Nil or very small gain in economic resource resulting in very minor or no observable improvement to economic receptors

### Significance of Effects

- 7.2.19 The significance of the effect upon the economy is determined by correlating the magnitude of the impact and the value of the receptor. The particular method employed for this assessment is presented in Table 7.5.

## Assessment Criteria and Assignment of Significance

- 7.2.20 A common approach used in the EIA process is the application of multi-criteria analysis. Common criteria used to evaluate significance include the sensitivity of the receiving environment and the magnitude of the predicted impact:

- **Magnitude** considers the characteristics of the change which are likely to affect the target receptor(s) as a result of the Proposed development – including the timing, scale, and duration of the impact; and
- **Sensitivity** is the importance of the receptor and its responsiveness to change, including its capacity to accommodate the impacts the Proposed development may bring about.

### Magnitude

- 7.2.21 There is no specific guidance on the approach to assessing the magnitude of socio-economic impacts. Magnitude of impact, based on the change that the Proposed development would have upon the resource/receptor, is considered within the range of high, medium, low, or negligible.
- 7.2.22 The magnitude of impacts can be assessed on the basis of a number of factors – scale, spatial extent, duration, frequency, and reversibility. Within the topic of socio-economics, these factors are considered as follows:
- **Scale:** the expected degree of change relative to baseline conditions.
  - **Spatial extent:** geographical area over which the impact may occur.
  - **Duration:** the time over which a potential impact occurs. A potential impact may be described as short, medium or long-term, and permanent or temporary. This chapter assesses potential impacts predicted to last for more than five years as 'long term', potential impacts predicted to last between one year and five years as 'medium term', and potential impacts predicted to last less than one year as 'short term'.

- **Frequency:** the number of times an impact occurs across the relevant phase/lifetime of a project. Construction phase impacts are typically predicted to be intermittent. Operations and maintenance phase impacts are predicted to be continuous.

7.2.23 The criteria for assessing the magnitude of impacts are outlined in Table 7.4 below:

**Table 7.6 – Assessing magnitude of impacts, socio-economics**

Magnitude	Description
High	<ul style="list-style-type: none"> <li>• Scale: major change of socio-economic conditions compared to the baseline.</li> <li>• Spatial extent: impact occurs at a national geography.</li> <li>• Duration: impact is of long term duration (more than five years).</li> <li>• Frequency: impact is continuous.</li> </ul>
Medium	<ul style="list-style-type: none"> <li>• Scale: moderate change of socio-economic conditions compared to the baseline.</li> <li>• Spatial extent: impact occurs at a regional geography.</li> <li>• Duration: impact is of medium term duration (between one and five years).</li> <li>• Frequency: impact is continuous, or frequent intermittency.</li> </ul>
Low	<ul style="list-style-type: none"> <li>• Scale: minor change of socio-economic conditions compared to the baseline.</li> <li>• Spatial extent: impact occurs at a local geography.</li> <li>• Duration: impact is of short term duration (under one year).</li> <li>• Frequency: impact is intermittent.</li> </ul>
Negligible	<ul style="list-style-type: none"> <li>• Scale: very minor change of socio-economic conditions compared to the baseline.</li> <li>• Spatial extent: impact occurs at a neighbourhood geography.</li> <li>• Duration: impact is of very short term duration (under one month).</li> <li>• Frequency: infrequent intermittency.</li> </ul>

## Sensitivity

7.2.24 The sensitivity of receptors can be assessed on the basis of a number of factors – vulnerability/tolerance, recoverability, and value/importance, as follows:

- **Vulnerability/tolerance:** the degree to which a receptor can accommodate a temporary or permanent change.
- **Recoverability:** the ability of a receptor to be able to return to a state close to that which existed before an activity or event occurred.
- **Value and importance:** the importance of the receptor in terms of social/community and/or economic value. In this chapter the receptor's policy importance is used as the primary indicator of value.

7.2.25 The criteria for assessing the sensitivity of receptors are outlined in Table 7.5 below:

**Table 7.7 – Assessing sensitivity of receptors, socio-economics**

Magnitude	Description
High	<ul style="list-style-type: none"> <li>• High vulnerability/low tolerance – the receptor is identified as being highly responsive to changes in conditions, and the receptor is highly</li> </ul>



Magnitude	Description
	<ul style="list-style-type: none"> <li>unlikely to be able to accommodate any of the impacts of the proposed development; and/or</li> <li>Low recoverability – the receptor is highly unlikely to return to a state comparable with the conditions that existed before delivery of the proposed development; and/or</li> <li>High value – the receptor is identified as a policy priority.</li> </ul>
Medium	<ul style="list-style-type: none"> <li>Medium vulnerability/tolerance – the receptor is identified as being slightly responsive to changes in conditions, and the receptor may be able to accommodate some impacts of the proposed development, but is unlikely to be able to fully accommodate all impacts; and/or</li> <li>Medium recoverability – the receptor is unlikely to return to the same conditions that existed before delivery of the proposed development; and/or</li> <li>Medium value – the receptor is identified as a medium policy priority.</li> </ul>
Low	<ul style="list-style-type: none"> <li>Low vulnerability/high tolerance – the receptor is identified as being unresponsive to changes in conditions, and the receptor is highly likely to be able to accommodate most impacts of the proposed development, and may be able to fully accommodate all impacts; and/or</li> <li>High recoverability – The receptor is likely to return to the same (or very similar) conditions that existed before delivery of the proposed development; and/or</li> <li>Low value – the receptor is not identified as a policy priority.</li> </ul>
Negligible	<ul style="list-style-type: none"> <li>There is evidence of very little or no vulnerability/complete tolerance to the proposed development; and/or</li> <li>The receptor is deemed not important at any policy level.</li> </ul>

### Significance of Effects

- 7.2.26 The significance of ~~the~~ effect upon ~~the economy is~~ socio-economic receptors has been determined by ~~correlating~~ taking into account the sensitivity of the receptor and the magnitude of the potential impact ~~and the value of the receptor. The particular method employed for this assessment is presented in Table 7.5.~~
- 7.2.27 As a guide, effects determined to be Moderate or Major are considered to be significant. However, this is tested with professional judgement.
- 7.2.28 The criteria for assessing significance of effects are outline in Table 7.6 below:

**Table 7.5 6 – Assessment Matrix, significance of effect**

Value	Magnitude			
	Negligible	Low	Medium	High
Negligible	Negligible	Negligible or minor	Negligible or minor	Minor
Low	Negligible or minor	Negligible or minor	Minor	Minor or moderate
Medium	Negligible or minor	Minor	Moderate	Moderate or major
High	Minor	Minor or moderate	Moderate or major	Major

- 7.2.29 ~~For the purposes of this assessment, any effects with a significance level of minor or less have been concluded to be not significant in terms of the EIA Regulations.~~

7.2.30 ~~The impacts identified below have been selected as those with the potential to result in the greatest effect on economic conditions during the construction phase:~~

- ~~• Employment (person-years)~~
- ~~• Wages~~
- ~~• GVA~~

7.2.31 ~~The impacts identified below have been selected as those with the potential to result in the greatest effect on economic conditions during the operational phase:~~

- ~~• FTE Employment~~
- ~~• Wages~~
- ~~• GVA~~

## Limitations of the Assessment

7.2.32 There are no formal measures of effect significance for socio-economic receptors. The assessment has therefore been informed by the professional judgment of the chapter authors.

7.2.33 The data sources used in this chapter are detailed above. The data used are the most up to date publicly available information which can be obtained from the applicable data sources as cited. The data is therefore limited by what is available and by what has been made available, at the time of writing the Environmental Statement.

7.2.34 It is considered that the data employed in the assessment are of a robust nature and are sufficient for the purposes of the assessment presented.

7.2.35 ~~The economic receptors and effects under consideration in this chapter do not intersect directly with the issues of climate change and population and human health. Therefore a consideration of these issues is not required as part of this chapter.~~

## 7.3 Legislative and Policy Context

7.3.1 This section covers the national, regional, and local legislative and policy provisions that relate to the economic impacts of the proposed development. ~~These are summarised in Table 7.6 at the end of the section.~~ The legislative and policy documents that cover relevant issues are summarised in Table 7.2.

### ~~UK~~

#### ~~UK Industrial Strategy~~

7.3.2 ~~The UK Industrial Strategy sets out the long-term policy by which the UK Government plans to boost the productivity performance of the UK economy. It sets an overarching context within which economic development takes place, and therefore is relevant to a Welsh context.~~

7.3.3 ~~The Strategy sets out five 'foundations of productivity' which set out a framework for working towards a transformed economy:~~

- ~~• Ideas — become the world's most innovative economy~~

- ~~People — create good jobs and greater earning power for all~~
- ~~Infrastructure — deliver a major upgrade to the UK's infrastructure~~
- ~~Business environment — make the UK the best place to start and grow a business~~
- ~~Places — foster prosperous communities across the UK~~

7.3.4 ~~On the final one of these five foundations, the Strategy sets out some of the key attributes of strong local economies. These key attributes include a good supply of skilled labour, and being well connected with land available for offices, factories, and homes.~~

## **Wales and Regional**

### **Well-being of Future Generations Act (Wales) (2015)**

- 7.3.5 In the Well-being of Future Generations (Wales) Act 2015, the Welsh Government (WG) commits to the aim of delivering 'sustainable development', which the Act defines as "the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the well-being goals."
- 7.3.6 As part of its well-being goals, the Act sets out the goal of promoting a 'prosperous' Wales. This means working towards "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."

### **Future Wales: The National Plan 2040 (2021)**

- 7.3.7 The Plan is a national development framework that sets a strategy for addressing key national priorities through the planning system, which includes sustaining and developing a vibrant economy, up to the year 2040. It is a spatial plan that sets a direction for where infrastructure and development should be invested.
- 7.3.8 Outcomes of the Plan include connected, inclusive and healthy places for people to live and work, encouraging sustainable growth to reduce socio-economic inequality, increase prosperity through promoting innovation, skills-development in sustainable industries/sectors.
- 7.3.9 The Plan notes that the Welsh Government recognises and supports the role of businesses of all sizes in strengthening, diversifying, and increasing the economy's resilience.
- 7.3.10 Protecting the military assets in Wales is important to the UK's strategic defence systems as well as for providing employment to many local communities across Wales.
- 7.3.11 Policy 10 identifies strategic gateways to facilitate international connectivity which includes Cardiff Airport. It is identified that the Bro Tathan Enterprise Zone also offers a range of development sites and business accommodation, providing opportunities for investment.

### **Prosperity for All: the ~~national strategy~~ National Strategy (2017)**

- 7.3.12 Prosperity for All takes the key commitments from the WG Programme for Government, and places them in a long-term context, setting out how they fit within the work of the Welsh public service.

7.3.13 There are a number of important commitments that fall under the strategy's first aim to provide 'prosperous and secure' economic growth, including:

- Use business support to build capacity and innovation within home grown businesses along local supply chains;
- Provide more effective support for the development of local supply chains and clusters, so that economic value is retained locally, and more employment opportunities are created closer to home; and
- Establish a bespoke infrastructure consenting process that is responsive to business and community needs, to support sustainable economic growth.

### **Prosperity for All: Economic Action Plan (2017)**

7.3.14 WG has developed an Economic Action Plan in line with the Prosperity for All national strategy. It outlines the actions WG will take to promote economic growth in Wales. The action plan also highlights a number of ways in which WG can respond to the challenges facing the Welsh economy.

7.3.15 The Plan sets out seven wellbeing objectives that act as a delivery framework:

- Support people and businesses to drive prosperity.
- Tackle regional inequality and promote fair work.
- Drive sustainable growth and combat climate change.
- Build ambition and encourage learning for life.
- Equip everyone with the right skills for a changing world.
- Deliver modern and connected infrastructure.
- Promote and protect Wales' place in the world.

### **Planning Policy Wales: Edition 12 (2024)**

7.3.16 WG defines economic development as "...the development of land and buildings for activities that generate sustainable long term prosperity, jobs and incomes." Land uses that can be considered to deliver economic growth include traditional employment land uses such as B1a office, B1b research and development, B1c and B2 industrial, and B8 warehousing.

7.3.17 Growth in innovative, emerging technology and high value added sectors, such as advanced engineering and low carbon energy, are also strongly supported to create investment and employment opportunities.

7.3.18 A number of key factors should be considered when assessing the sustainability benefits of a development, including:

- The numbers and types of long term jobs expected to be created or retained;
- How the development will help redress economic disadvantage or support regeneration priorities, for example by enhancing local employment opportunities;
- The contribution the development would make to achieving wider strategies, for example the growth or regeneration of certain areas; and

- How the proposal would support the achievement of a more prosperous, low carbon, innovative and resource efficient Wales.

### Technical Advice Note 23: Economic Development (2014)

- 7.3.19 The Welsh Government provides a number of technical advice notes that provide detailed planning guidance. These notes are taken into account during the preparation of local development plans by local authorities. Technical Advice Note (TAN) 23 provides guidance on the role of land use planning in promoting economic growth. It takes a 'whole economy' view of sustainable economic growth - it does not assume that economic objectives are necessarily in conflict with social and environmental ones, with physical development able to simultaneously contribute to these different dimensions of sustainability. TAN 23 recognises the importance of developing B1-B8 land uses as part of this process.
- 7.3.20 There are three primary questions that TAN 23 requires planning authorities to ask when considering a planning application.
- 7.3.21 Firstly, if the application is refused, is it likely the demand could be met on an alternative site where development would cause less harm? Alternative locations will not necessarily be confined to the same local authority. If the subject site does not possess any unique characteristics, it should be possible to find alternative locations nearby. Where a subject site possesses distinct advantages, it may be necessary to look much further afield for suitable alternative locations.
- 7.3.22 Secondly, how many direct jobs will be based at the site? TAN 23 requires consideration of the approximate measure of a development's contribution to the local economy. Such an assessment can also include indirect job creation.
- 7.3.23 Thirdly, would the development make any special contribution to policy objectives? This makes it necessary to consider policy objectives listed in PPW. Developments that contribute positively to these categories count as making special policy contributions.

### People, Places, Futures – The Wales Spatial Plan (2008)

- 7.3.24 Note: the Welsh Planning Directorate are currently producing a National Development Framework for Wales, which will set out a 20-year land use framework for Wales and will replace the current Wales Spatial Plan when published.
- 7.3.25 People, Places, Futures (PPF) guidance states that a sustainable future "depends on the vitality of our communities as attractive places to live and work. We need to reduce inequalities between communities whilst retaining their character and distinctiveness" (para 10).

### Cardiff Capital Region Industrial and Economic Plan (2019)

- 7.3.26 The Cardiff Capital Region (CCR) Industrial and Economic Plan is designed as a flexible, long-term strategic framework covering a period of twenty years. It was developed to guide the region's economic development and will be periodically refreshed and updated to adapt to dynamic challenges. Growth Partnership have published the Plan in order to identify and address the priorities facing the Region.
- 7.3.27 The Plan sets out an approach based on:

- ~~Cohesion~~ — Policy collaboration and delivery partnerships ensuring there is cumulative impact delivered by investments and interventions
- ~~Scale~~ — A limited number of significant interventions, rather than a disparate range of loosely connected small-scale activities.
- ~~Leverage~~ — Maximise investments by attracting co-investors with complementary funding and resources.
- ~~Return on Investment~~ — Demonstrable impact and benefit will be expected from all investments and interventions.
- ~~Ecosystem Development~~ — Supporting the development of a strong economic and innovation ecosystem to deliver the Plan and develop clusters of excellence.

- 7.3.28 The Plan outlines the investment and intervention framework that will drive decision making. This framework consists of three investment priorities: Innovation, Infrastructure, and 'Challenge'.
- 7.3.29 Innovation-centred investments will focus on opportunities where a competitive strength exists, and will aim to provide a significant contribution to jobs growth, investment, and GVA uplift.
- 7.3.30 The Plan lists a number of strategic sectors that will be strategically targeted for support, including 'Transport Engineering', which includes aircraft related activities.
- 7.3.31 The importance of infrastructure fit for the modern economy is also emphasised in the Plan. Reliable infrastructure is needed that connects the region both internally and with other areas, thereby boosting productivity. Part of this will be to develop a series of 'strategic employment spaces' across the region to meet the needs of businesses. The Cardiff Airport and St Athan Enterprise Zone is listed as one of the Plan's 'Strategic Hubs and Opportunity Areas'.

### Strengths, Weaknesses, Opportunities, and Threats

- 7.3.32 The CCR economy has several **strengths**. It has a highly skilled workforce, with a significant proportion holding degree-level qualifications or equivalent. Cardiff, the region's capital city, offers cultural, sporting, and lifestyle amenities, enhancing the quality of life. Investments in key infrastructure projects, such as the South Wales Metro and the Compound Semiconductor Foundry, provide a foundation for economic growth. Furthermore, the strong public sector base offers potential for innovation-driven public services.
- 7.3.33 The region also faces some economic **weaknesses**. Productivity levels and GVA per capita remain low. There is a dependency on the public sector for employment, which poses a challenge for economic diversification. Additionally, the region suffers from poor physical and digital connectivity, hampering internal and external economic interactions. Participation rates in the workforce are lower compared to other regions, indicating untapped potential in the labour market.
- 7.3.34 Despite these challenges, the CCR economy has significant **opportunities**. The potential to leverage investment can stimulate economic growth and development. The Plan prioritises the creation of a rich economic ecosystem to support the following key sectors:
- Compound Semiconductors and its supply chain
  - FinTech
  - Cyber Security Analytics



- Artificial Intelligence
- Creative Economy
- Life sciences, particularly medical devices and diagnostics
- Transport Engineering, including automotive, trains, and aircraft

7.3.35 Enhancing digital and transport connectivity can further boost regional productivity and attract investment. Innovation-led growth, driven by increased R&D and the establishment of competitive clusters, offers promising prospects for the future.

7.3.36 Nevertheless, the region is still exposed to certain **threats**. Economic uncertainties have arisen from the end of European Structural Funds, creating a competitive pressure to attract new investments and co-funding. Barriers to delivering large-scale projects may include logistical and financial constraints, which could impede progress. Moreover, there is a risk of uneven economic growth, leading to regional disparities that need to be carefully managed to ensure balanced development.

### **Growth prospects and policy ambitions**

7.3.37 The Plan sets ambitious targets for the CCR economy, aiming to create 25,000 new jobs, achieve a 5% increase in GVA, and leverage £4 billion of additional investment. It highlights a strategic focus on boosting productivity and inclusive growth through innovation, infrastructure development, and addressing specific regional challenges. The growth prospects are bolstered by investments in critical sectors and the development of economic and innovation ecosystems.

### **Employment sites – supply and demand**

7.3.38 The Plan recognises the need for strategic employment sites across CCR to meet business demands. It places an emphasis on the development of a series of strategic hubs and opportunity areas, including cities like Cardiff and Newport, enterprise zones like Ebbw Vale and Cardiff Airport and St Athan, and strategic hubs in larger towns across the region. The focus is on delivering sites that support the development of key sectors and enhance connectivity.

7.3.39 CCR faces challenges in delivering sufficient employment land due to logistical, financial, and infrastructural constraints. The plan outlines the necessity of enhancing digital and transport infrastructure to support regional connectivity. Barriers to delivery include the need for significant public and private investment, coordination among numerous stakeholders, and overcoming existing limitations in infrastructure and connectivity.

### **Regional Economic and Industrial Plan 2023–2028 (2023)**

7.3.40 The Cardiff Capital Region Economic and Industrial Plan 2023-2028 outlines strategies to address economic disparities, enhance innovation, and improve infrastructure.

7.3.41 The investment priorities within the Economic and Industrial Plan can be summarised as follows:

- **Supporting private sector led development and site-specific infrastructure**
- **Creating new or refurbished employment sites to support innovation, business growth, and regeneration**
- **Increasing productivity in strategic locations**
- Leading the transition to a net-zero regional transport network through the deployment of green technologies and infrastructure

- Delivering a Strategic Development Plan for commercial sites, energy, digital infrastructure, and transport connectivity.
- Growing the green economy through initiatives centred on green technologies and future skills.
- Leveraging public sector research and innovation funding streams

7.3.42 The Plan outlines the need for new and refurbished employment spaces to support innovation, business growth, and regional regeneration. To stimulate growth in strategic sectors such as FinTech, MedTech, and green technologies, there is an emphasis on creating high-quality employment spaces. Industrial premises in key strategic locations are particularly crucial to accommodate the growth of priority sectors. The Plan highlights that providing adequate floorspace is essential to support the establishment and expansion of high-growth clusters, ensuring the region remains competitive and can effectively support business innovation and development.

### **Investment Prospectus: Prosperity for our Place (2021)**

7.3.43 The CCR Investment Prospectus outlines the strategic investment needs and proposals for the region over a five-year period from 2021 to 2026. It presents both immediate and longer-term investment requirements aimed at supporting the region's economic growth and resilience.

7.3.44 The Prospectus retains the key sector definitions set out within the Industrial and Economic Plan (2019) and adds Energy and Environment to the sector mix.

7.3.45 The Prospectus sets out its core propositions – these are targeted and focused transformational proposals, built around priority sectors. The complimentary enabling propositions are foundational investments which will serve the whole region – the enabling propositions are as follows:

- Harnessing the power of digital - fibre to the Premise and 5G enablement
- **Provision of accessible, affordable sites and premises**
- Aligning skills provision with future industry and sector needs
- Future proofing rail infrastructure
- Green energy: ULEV/refits/renewables

7.3.46 The provision of accessible, affordable sites and premises is listed as an enabling proposition.

7.3.47 Enabling Proposition 2 focuses on addressing the critical need for accessible and affordable employment premises across the Cardiff Capital Region (CCR). The region requires significant investment to support foundational growth, local supply chains, and sector-specific developments. This proposition aims to overcome current barriers and stimulate economic activity.

7.3.48 The Prospectus highlights that the availability of development funding remains highly limited. This situation has been exacerbated by the COVID-19 pandemic, which has further restricted the availability of speculative development finance. Without the development of speculative schemes that support clusters and create quality employment space, the region risks falling behind other competing areas.

7.3.49 Key aims of this Enabling Proposition include:

- **Infrastructure:** creating grade A or equivalent employment space, reusing brownfield land, and promoting regeneration.
- **Innovation:** supporting projects that drive innovation, business growth, and regeneration.
- **Skills and Employment:** promoting job creation aligned with strategic objectives.

7.3.50 By delivering on this Enabling Proposition, CCR aims to address the current shortfall in development and create a pipeline of quality employment space. This will attract inward investment, support the growth of key sectors, and drive economic recovery in the post-pandemic landscape. The Enabling Proposition aims to ensure that CCR is well-positioned to capitalise on economic opportunities, foster innovation, and create sustainable employment opportunities across the region.

## Vale of Glamorgan

### Local Development Plan (2017)

- 7.3.51 The purpose of the LDP is to guide the decision-making process of the Vale of Glamorgan Council, with the aim of ensuring the most efficient use of land and other resources and promote the regeneration and stimulation of the local economy.
- 7.3.52 The vision set out in the LDP includes the aim to:
- 7.3.53 *“Develop a diverse and sustainable economy that maximises the Vale of Glamorgan’s assets and the potential of its position within the region, to provide opportunities for working that benefit residents and businesses and attracts visitors and investment”*
- 7.3.54 The LDP also outlines a number of key strategic objectives that support the social, economic, and sustainability themes that form a key part of the LDP Strategy, including:
- 7.3.55 *“To foster the development of a diverse and sustainable local economy that meets the needs of the Vale of Glamorgan and that of the wider South East Wales Region.”*
- 7.3.56 The need to provide employment opportunities and attract investment is seen as an essential component of truly sustainable communities. Capitalising on the opportunity at the St Athan – Cardiff Airport Enterprise Zone is seen as an important part of meeting this objective. In meeting this objective, the LDP commits to prioritising ‘new high quality employment that increases prosperity but reduces local deprivation and daily out-commuting’.
- 7.3.57 Policy MG9 outlines the land allocated for employment, which includes the land adjacent to Cardiff Airport and Port Road on which the Site is located. Policy MG10 outlines the scope of uses at the site as new ‘aerospace, education, research and development, manufacturing, office and other ancillary development’. The LDP emphasises the importance of Cardiff Airport to the future prosperity of the Vale of Glamorgan.
- 7.3.58 The purpose of allocating this land for development as employment floorspace is to cater specifically for the needs of the aerospace and defence industries, and ‘high tech’ manufacturing. The site is not allocated to meet local demand – instead it is hoped development will encourage inward investment and consolidate the role of the Vale of Glamorgan within the Capital Region.

### Employment Land and Premises Study (2013)

- 7.3.59 ~~The report assesses the supply, need and demand for employment land and premises in Vale of Glamorgan.~~
- 7.3.60 ~~The Study makes a series of area specific recommendations. Relevant to the Site is the recommendation regarding the St Athan – Cardiff Airport Enterprise Zone. The recommendation for this area, which includes the Site, is to work with Welsh Government and other stakeholders to bring forward development and market land and property to potential occupiers.~~
- 7.3.61 ~~The report outlines the strategic context for employment land at Cardiff Airport.~~
- 7.3.62 ~~The land and facilities close to the airport are available for possible MRO and related supply chain operators, activities that will complement the existing British Airways maintenance facility. A quarter of the UK's MRO activity is located in Wales, with the majority of this activity based at Cardiff Airport or St Athan. The aim of the developing the land that comprises the Enterprise Zone is to grow a critical mass of MRO related activity in the area. The Vale of Glamorgan Council see the Enterprise Zone as an important strategic site within the Vale, with a focus on high value engineering.~~
- 7.3.63 ~~The proximity of the airport and its runway will allow for the rapid transit of cargo, making nearby land an optimal location for storage and freight related businesses as well.~~
- 7.3.64 ~~The report also identifies a number of emerging property trends that should inform the development process. It highlights that in both the office and industrial market, companies are looking for higher quality accommodation. Modern premises need to accommodate research-based manufacturing space with an element of office space. This is important in encouraging an innovative environment, as well as clustering related business activities.~~

### **Cardiff Airport 2040 Masterplan (2019)**

- 7.3.65 Cardiff International Airport Ltd has published a Masterplan setting out plans for growth over the next 20 years.
- 7.3.66 The Masterplan highlights the importance of being located within the Cardiff Airport and St Athan Enterprise Zone, and the opportunity it presents for the development of bespoke facilities and investment in employment accommodation. The airport facilities currently accommodate a variety of aviation and aerospace businesses and related activities, including the British Airways maintenance facility, Cardiff Aviation Training Centre, and the International Centre for Aerospace Training.
- 7.3.67 One of the priorities set out in the Masterplan is to deliver a complementary land use strategy that supports business, innovation, and commercial activities. This includes expansion of cargo facilities and services, and a new business and education campus. The Masterplan highlights the potential for the airport's cargo facilities to accommodate growth.
- 7.3.68 The Masterplan sets out a development strategy, a primary component of which is a new terminal. The driving force for this new terminal is to allow for integration with the Enterprise Zone and associated business and commercial developments. It is hoped this expansion will support more jobs, both directly and throughout the wider aviation sector supply chain. The Enterprise Zone is referenced as a key component for creating the conditions required to attract aviation and aerospace related businesses. Further development of the airport will also create opportunities for education and innovation.

## **Summary**

- 7.3.69 This section has considered the national, sub-regional, and local context in terms of legislation, planning and economic development policy, strategy, and research relevant to the proposed development.
- 7.3.70 The key themes present in the legislation and policy documents discussed in this chapter are summarised in ~~Table 7.6~~ **Table 7.7** below.

**Table 7.87 – Summary of key legislation and policy themes**

Theme	Sources
	<del>UK Industrial Strategy</del>
Achieving sustainable economic growth through the creation of good quality employment opportunities, thereby increasing the earning potential of every individual and redressing economic disadvantage.	Well-being of Future Generations (Wales) Act <del>Future Wales: The National Plan 2040</del> Prosperity for All: the national strategy Planning Policy Wales Technical Advice Note 23: Economic Development People, Places, Futures – The Wales Spatial Plan Cardiff Capital Region Industrial and Economic Plan Local Development Plan: Written Statement
	<del>UK Industrial Strategy</del>
Increasing innovation and research and development activities throughout the economy by encouraging the establishment of sectoral clusters, in part to drive productivity gains.	Well-being of Future Generations (Wales) Act Prosperity for All: the national strategy Planning Policy Wales Cardiff Capital Region Industrial and Economic Plan Employment Land and Premises Study Local Development Plan Cardiff Airport 2040 Masterplan
	<del>UK Industrial Strategy</del>
Deliver modern infrastructure and ensure a well-connected economy to ensure Wales and the Vale of Glamorgan are attractive locations to 'do businesses'	Prosperity for All: the national strategy Prosperity for All: Economic Action Plan Cardiff Capital Region Industrial and Economic Plan Employment Land and Premises Study Local Development Plan Cardiff Airport 2040 Masterplan

## 7.4 Existing Baseline Conditions

- 7.4.1 This section considers the existing economic conditions at the site level and at the Vale of Glamorgan local authority level. Information on the economic baseline conditions within the Vale of Glamorgan has been collected through a detailed desktop review of existing studies and datasets. These are summarised in ~~Table 1.2~~ **Table 7.3**. A summary of the key baseline indicators is provided at the end of the section.

### Site Level ('Reference Case')

- 7.4.2 The HRT submission to the Vale of Glamorgan Council provides information on the existing economic activity at the site level.
- 7.4.3 The Site is currently used for the running of an agricultural business which consists of approximately 113.4 ha made up of 99.5 ha of permanent pasture, and some farm buildings and woodland areas (unspecified coverage).
- 7.4.4 Using DEFRA Farming Statistics an indicative figure for hectares per employee has been calculated using the quotient of 'Total area on agricultural holdings' and 'Total number of people working on commercial agricultural holdings' (30.2 ha per employee).

- 7.4.5 Using this indicative density figure, it is estimated that the farm would support 4 employees in the Agriculture sector as a going concern.
- 7.4.6 Data from the Annual Survey of Hours and Earnings (ONS, 2018-24) has been used to determine the earnings impacts associated with this level of employment in the Agriculture sector (£24,073 26,000 median annual earnings). The anticipated level of employment could support approximately £96,300 104,000 in wages.
- 7.4.7 Data from the Annual Business Survey (ONS, 2019) has been used to determine the GVA impacts associated with this level of employment in the Agriculture sector (£51,347 GVA per worker). Based on these parameters, the anticipated level of employment could support approximately £205,400 in GVA.
- 7.4.8 The assumptions relating to Net Additional Economic Impacts (Operational) outlined later on in this section have been applied to the above gross direct impacts to derive the net additional impacts of the continued operation of the farm.
- 7.4.9 In the event of the proposed development proceeding, it is assumed all of these economic impacts would be lost in their entirety.

### Local Authority Level

## Assessment study area (Vale of Glamorgan) and wider economic context (CCR)

### GVA

- 7.4.10 The Vale of Glamorgan economy contributed approximately £2.92 billion in GVA to the Welsh economy in 201522, which was around 3.60% of the Welsh economy as a whole that year (ONS). Of the 22 local authorities in Wales, Vale of Glamorgan ranked 135th in total GVA output.
- 7.4.11 The ONS reports that, in 201522, GVA per job in the Vale of Glamorgan was £41,400 (45,000 compared to an average of £50,300 in Wales and £61,500 in the UK (analysis of *Regional Gross Value Added, Regional and by Local Authority and Jobs Density*)).
- 7.4.12 The ONS reports that, in 2022, GVA per job in the CCR was £48,200 compared to an average of £41,91750,300 in Wales and £51,61961,500 in the UK (analysis of *Regional and Subregional Productivity* Gross Value Added, Regional and by Local Authority and Jobs Density).

### Population

- 7.4.13 The Office for National Statistics (ONS) *Mid-Year Population Estimates* reports a resident population of 130,700133,500 persons in Vale of Glamorgan in 201722 (latest available).
- 7.4.14 The population of the Vale of Glamorgan has increased by 4.85.1% over the ten-year period 2007-17 (Mid-Year 2012-2022 (*Population Estimates*, ONS)).
- 7.4.15 The Office for National Statistics (ONS) *Population Estimates* report a resident population of 1,541,000 persons in the Cardiff City Region in 2022 (latest available).
- 7.4.16 The population of the CCR has increased by 3.5% over the ten-year period 2012-2022 (*Population Estimates*, ONS).



## Industry

7.4.17 There are 4,220,580 businesses in the Vale of Glamorgan (ONS, 2023).

7.4.18 The Vale of Glamorgan economy is dominated by micro businesses. This is not too dissimilar to the business base of Wales and the UK as a whole, although it is slightly more pronounced in the Vale of Glamorgan. Business size characteristics are set out in Table 7.8 below.

**Table 7.78 – Business base by business size, Vale of Glamorgan**

Business size	Vale Glamorgan	of Wales	UK
Micro (0–9 employees)	90.91%	89%	89%
SME (10–249 employees)	4.09%	11%	4.11%
Large (250+ employees)	0.1%	0.3%	0.4%

Source: *UK Business Counts*, ONS (Note – figures may not sum due to rounding)

7.4.19 The number of micro and small-medium size enterprises (SME) in the Vale of Glamorgan increased between 2014 and 2018 (UK Business Counts, ONS). It is difficult to make an accurate assessment of the change in the number of large businesses in the Vale of Glamorgan as ONS figures are rounded to the nearest five. However, the data presented in Table 7.9 below shows there are very few.

**Table 7.89 – Change in size band distribution of businesses 2014–2018–2023, Vale of Glamorgan**

Business size	2014	2018	2023
Micro (0–9 employees)	3,300	3,800	3,800–4,100
SME (10–249 employees)	380	405	405–420
Large (250+ employees)	5		5

Source: *UK Business Counts*, ONS

7.4.20 Overall, the Vale of Glamorgan's business base is less more 'active' when compared to the picture across Wales and the UK. The number of enterprises in the Vale of Glamorgan increased by 43.6.1% between 2013–17 and 2018–23, compared to an increase of 14.63.4% in Wales and 49.52.1% in the UK as a whole (Business Demography, ONS).

7.4.21 There are 45,000 businesses in the CCR (2023 figures).

7.4.22 The CCR economy is dominated by micro businesses. This is similar to the business base of Wales and the UK as a whole. CCR's business size characteristics are set out in Table 7.10 below.

**Table 7.9 – Business base by business size, CCR**

Business size	CCR	Wales	UK
Micro (0–9 employees)	89%	89%	89%

SME (10–249 employees)	11%	11%	11%
Large (250+ employees)	0.4%	0.3%	0.4%

Source: *UK Business Counts*, ONS (Note – figures may not sum due to rounding)

- 7.4.23 As shown in Table 7.11, the number of micro and small-medium size enterprises (SME) in the CCR increased between 2018 and 2023 (*UK Business Counts*, ONS). It is difficult to make an accurate assessment of the change in the number of large businesses in the CCR as ONS figures are rounded to the nearest five, however the number of these large businesses has also increased.

**Table 7.10 – Change in size band distribution of businesses 2018–2023, CCR**

Business size	2018	2023
Micro (0–9 employees)	38,100	39,800
SME (10–249 employees)	4,800	5,000
Large (250+ employees)	175	185

Source: *UK Business Counts*, ONS

- 7.4.24 Overall, the CCR's business base is slightly more 'active' when compared to the picture across Wales and the UK. The number of enterprises in the Vale of Glamorgan increased by an average annual growth rate of 0.9% between 2018-23, compared to an increase of 0.7% in Wales and 0.4% in the UK as a whole (*Business Demography*, ONS).

## Employment and Economic Activity

- 7.4.25 The most comprehensive measure of jobs in an area is the ONS Jobs Density measure. This reports 49,000 jobs in the Vale of Glamorgan in 2017/22.
- 7.4.26 ~~The~~ In 2023, the economic activity rate in Vale of Glamorgan is 84.578.1%. This is higher than the Wales average (76.777.0%) and ~~GB~~ just below the UK average (78.57%) (ONS Annual Population Survey, ~~Jan 2018 – Dec 2018~~).
- 7.4.27 The employment rate in the Vale of Glamorgan is measured at 7877.5% compared to Wales (73.1%) and ~~GB~~ (75.7%) and GB (74.1%) for 2023. Self-employment is high low in the Vale of Glamorgan, at 11.4 6.7% compared to 9.3% in Wales and 10.6 8.5% in ~~GB~~ the UK for the year 2023. Unemployment is low in the Vale of Glamorgan (3.6%) compared to Wales (4.6%) and ~~GB~~ (4.3.7%) and GB 3.7%; all figures ONS Annual Population Survey, 201824).
- 7.4.28 ~~Table 7.9~~ Table 7.12 shows the share of Vale of Glamorgan residents employed in occupation categories 1-3 (higher order occupations) is much higher than the Wales average (*Annual Population Survey*, ONS). The number employed in occupation categories 4-6 (middle order occupations) is slightly lower than the Wales average. The number employed in occupation categories 7-9 (lower order occupations) is also slightly lower than the Wales average.

**Table 7.912 – Resident employment by SOC, Vale of Glamorgan (201823)**

Occupation	Total employment	Share employment (VoG)	of Share employment (Wales)	of
1: Managers, directors and senior officials	9,000 5,800	14 9.2%	10 9.1%	
2: Professional occupations	13,600 17,600	21 28.0%	19 23.5%	
3: Associate prof & tech occupations	11,600 10,400	18 16.7%	14.4%	
4: Administrative and secretarial occupations	5,200 4,400	8 7.1%	10 9.7%	
5: Skilled trades occupations	5,400 1,500	9 2.4%	12 9.4%	
6: Caring, leisure and other service occupations	6,300 7,600	10 12.1%	10 9.3%	
7: Sales and customer service occupations	5,100	8.2%	8 7.4%	
8: Process, plant and machine operatives	1,900 3,300	3 5.2%	7 6.5%	
9: Elementary occupations	4,700 6,700	8 10.1%	11 10.3%	

Source: HJA analysis based on *Annual Population Survey*, ONS (figures may not sum due to rounding)

- 7.4.29 The proportion of the Vale of Glamorgan population aged 16–64 with ~~NVRQF~~4+ as a highest level of qualification in 2023 is reported at 45.051.1% compared to 35.443.2% in Wales and 39.347.1% in GBUK (*Annual Population Survey*, ONS).
- 7.4.30 This data on occupational and skills indicates a relatively high concentration of high-skill residents working in high-order occupations.
- 7.4.31 38.51% of jobsall employees in the Vale of Glamorgan are part time (ONS, BRES). This compares to 35.434.5% in Wales and 32.531.1% GB.
- 7.4.32 ~~Whilst the~~The employment and economic activity rates in the Vale of Glamorgan indicate labour market participation levels in the Vale of Glamorgan are at or above the Welsh average. ~~this is also based to some extent on higher levels of self-employment and part-time working.~~

## Employment and Economic Activity

- 7.4.33 The most comprehensive measure of jobs in an area is the ONS Jobs Density measure. This reports 724,000 jobs in the CCR in 2022.
- 7.4.34 The economic activity rate in CCR was 76.5% in 2023. This is higher than the Wales average (77.0%) and just below the UK average (78.7%) (*ONS Annual Population Survey*).
- 7.4.35 The employment rate in the CCR is measured at 73.2% compared to Wales (75.7%) and GB (74.1%) for 2023. Self-employment is high in the CCR, at 6.5% compared to 9.3% in Wales and 8.5% in the UK for the year 2023. Unemployment is low in the CCR (4.4%) compared to Wales (3.7%) and GB (3.7%); all figures ONS Annual Population Survey, 2024).
- 7.4.36 Table 7.13 shows the share of CCR residents employed in occupation categories 1-3 (higher order occupations) is higher than the Wales average (*Annual Population Survey*, ONS). The number employed in occupation categories 4-6 (middle order occupations) is slightly lower than

the Wales average. The number employed in occupation categories 7-9 (lower order occupations) is also slightly lower than the Wales average.

**Table 7.11 – Resident employment by SOC, CCR (2023)**

Occupation	Total employment	Share of employment (VoG)	Share of employment (Wales)
1: Managers, directors and senior officials	64,100	8.8%	9.1%
2: Professional occupations	183,200	25.2%	23.5%
3: Associate prof & tech occupations	106,500	14.7%	14.4%
4: Administrative and secretarial occupations	73,500	10.1%	9.7%
5: Skilled trades occupations	54,900	7.6%	9.4%
6: Caring, leisure and other service occupations	65,200	9.0%	9.3%
7: Sales and customer service occupations	54,900	7.6%	7.4%
8: Process, plant and machine operatives	45,100	6.2%	6.5%
9: Elementary occupations	74,900	10.3%	10.3%

Source: HJA analysis based on *Annual Population Survey*, ONS (figures may not sum due to rounding)

- 7.4.37 The proportion of the CCR population aged 16–64 with RQF4+ as a highest level of qualification in 2023 is reported at 43.6% compared to 43.2% in Wales and 47.1% in UK (Annual Population Survey, ONS).
- 7.4.38 This data on occupation and skills indicates a slightly higher concentration of high-skill residents working in high-order occupations than compared to Wales.
- 7.4.39 32.5% all employees in the Vale of Glamorgan are part time (ONS, BRES). This compares to 34.5% in Wales and 31.1% GB.
- 7.4.40 The employment and economic activity rates in the CCR indicate labour market participation levels in the CCR are at or above the Welsh average.

### Sector Profile

- 7.4.41 Location Quotients (LQ) show the concentration of sectors in an area, relative to the UK economy. An LQ of 1 indicates the sector has an equal concentration to GB, an LQ>1 shows a relative concentration of activity in that sector. An LQ<1 shows an under-representation of that sector.
- 7.4.42 ~~Table 7.10 reports~~ Table 7.14 sets out the number of businesses and level of employment of each sector in the Vale of Glamorgan, along with the equivalent LQ for each metric.
- 7.4.43 In terms of business numbers and concentration, the Vale of Glamorgan has a relatively strong business base in ~~Manufacturing (LQ = 1.19)~~, Accommodation and food services (1.21), ~~Real estate (1.1445)~~, Human health and social work (1.1540), Arts, entertainment and recreation (1.2318), ~~Public administration and defence (1.28)~~, Education (1.24), and Other services (1.1343).

7.4.44 In terms of employment numbers and concentration, the Vale of Glamorgan has a relatively strong representation in ~~Agriculture, forestry and fishing~~ Water supply (1.5074), Accommodation and food services (1.4215), Real estate (1.17), Administrative and support service activities (1.11), Public administration and defence (1.4655), Education (1.2409), Human health and social work (1.4725), Arts, entertainment and recreation (1.4714), and Other services (1.4611).

**Table 7.12 – Total business LQ by sector, Vale of Glamorgan (2017/2022/23)**

Sector	Total bus. (2023)	LQ (2023)	Total emp. (2022)	LQ (2022)
A : Agriculture, forestry and fishing	<del>175</del> 185	<del>0.82</del> 0.79	<del>1,000</del> 600	<del>1.50</del> 0.9
B : Mining and quarrying	<del>5</del> 0	<del>2.84</del> 0.00	<del>50</del> 20	<del>0.73</del> 0.3
C : Manufacturing	<del>255</del> 215	<del>1.19</del> 0.96	<del>3,000</del> 3,500	<del>0.90</del> 1.1
D : Energy	<del>0</del> 5	<del>0.00</del> 0.51	<del>25</del> 20	<del>0.35</del> 0.1
E : Water supply	<del>20</del> 25	<del>1.70</del> 1.74	<del>150</del> 250	<del>0.53</del> 0.8
F : Construction	<del>500</del> 590	<del>0.99</del> 0.95	<del>2,250</del> 2,000	<del>1.09</del> 0.9
G : Wholesale and retail trade	<del>630</del> 640	<del>1.06</del> 0.97	<del>5,000</del> 6,000	<del>0.79</del> 1.0
H : Transportation and storage	<del>125</del> 205	<del>0.71</del> 0.97	<del>1,500</del> 2,250	<del>0.77</del> 1.0
I : Accommodation and food services	<del>290</del> 330	<del>1.21</del> 1.15	<del>3,500</del> 5,000	<del>1.12</del> 1.5
J : Information and communication	<del>280</del> 275	<del>0.80</del> 0.89	<del>1,750</del> 600	<del>0.98</del> 0.3
K : Financial and insurance activities	<del>80</del> 90	<del>0.90</del> 0.92	<del>450</del> 600	<del>0.32</del> 0.4
L : Real estate	<del>170</del> 220	1.14 1.17	<del>700</del> 600	<del>0.94</del> 0.7
M : Professional, scientific and technical activities	<del>725</del> 625	0.94 0.91	<del>3,000</del> 2,500	<del>0.84</del> 0.6
N : Administrative and support service activities	<del>360</del> 415	0.97 1.11	<del>1,750</del> 2,000	<del>0.47</del> 0.5
O : Public administration and defence	20	1.72 1.55	<del>2,000</del> 2,500	<del>1.16</del> 1.3
P : Education	<del>90</del> 85	1.15 1.09	4,500	<del>1.24</del> 1.2
Q : Human health and social work activities	<del>22</del> 05	1.15 1.25	8,000	<del>1.47</del> 1.4
R : Arts, entertainment and recreation	<del>125</del> 135	1.23 1.14	1,250	<del>1.17</del> 1.2
S : Other service activities	<del>190</del> 205	1.13 1.11	<del>1,000</del> 1,250	<del>1.16</del> 1.4
Total	<del>4,250</del> 4,500		<del>42,000</del> 43,400	

Source: HJA analysis based on *UK Business Counts* and *BRES*, both ONS (Note – figures may not sum due to rounding)

7.4.45 Using an indicative definition of the aerospace sector (SIC codes 30.30 and 33.16), the Vale of Glamorgan has a very high concentration of businesses (~~14.74~~ 6.17) and employment (~~10.20~~ 4.90) in this industry. The same is true of defence (SIC code 84.22) which has an LQ of ~~3.24~~

2.79 in employment terms (business figure unavailable due to data suppression). The Vale of Glamorgan also has a relatively ~~high concentration of businesses (1.25) and employment (1.83)~~ average concentration of businesses (0.98) and a high concentration of employment (1.71) in advanced engineering and manufacturing (SIC codes 20, 21, 26, 27, 28, 29, 30, 33, and 71.12). It is possible that the Proposed development will feature activities related to these sectors.

- 7.4.46 Table 7.15 reports the number of businesses and level of employment of each sector in the CCR, along with the equivalent LQ for each metric.
- 7.4.47 In terms of business numbers and concentration, the CCR has a relatively strong business base in Transportation and Storage (LQ = 1.38), Accommodation and food services (1.32), Water supply services (1.32), Human health and social work (1.14), Manufacturing (1.12) and Other services (1.17).
- 7.4.48 In terms of employment numbers and concentration, the CCR has a relatively strong representation in Public administration and defence (1.81), Energy (1.66), Water supply services (1.48), Manufacturing (1.34), Financial and insurance activities (1.25), and Other services (1.13).

**Table 7.13 – Total business LQ by sector, Vale of Glamorgan (2022/23)**

Sector	Total bus. (2023)	LQ (2023)	Total emp. (2022)	LQ (2022)
A : Agriculture, forestry and fishing	1,490	0.64	5,000	0.5
B : Mining and quarrying	15	0.74	450	0.5
C : Manufacturing	2,500	1.12	66,000	1.3
D : Energy	70	0.72	4,000	1.7
E : Water supply	190	1.32	7,000	1.5
F : Construction	6,300	1.01	32,000	1.0
G : Wholesale and retail trade	7,245	1.09	85,000	0.9
H : Transportation and storage	2,930	1.38	28,000	0.9
I : Accommodation and food services	3,795	1.32	51,000	1.0
J : Information and communication	2,340	0.76	20,000	0.7
K : Financial and insurance activities	1,025	1.05	27,000	1.3
L : Real estate	1,670	0.89	12,000	0.9
M : Professional, scientific and technical activities	5,500	0.80	39,000	0.7
N : Administrative and support service activities	3,685	0.99	47,000	0.8
O : Public administration and defence	145	1.13	54,000	1.8
P : Education	725	0.93	59,000	1.1
Q : Human health and social work activities	2,055	1.14	94,000	1.1
R : Arts, entertainment and recreation	1,095	0.92	17,000	1.1
S : Other service activities	2,175	1.17	15,000	1.1
<b>Total</b>	<b>44,960</b>		<b>662,450</b>	



Source: HJA analysis based on *UK Business Counts* and *BRES*, both ONS (Note – figures may not sum due to rounding)

- 7.4.49 Using an indicative definition of the aerospace sector (SIC codes 30.30 and 33.16), the CCR has a high concentration of businesses (2.88) and employment (1.72) in this industry. Defence (SIC code 84.22) employment concentration is lower which has an LQ of 0.32 (business figure unavailable due to data suppression). The CCR also has an average concentration of businesses (0.98) and higher concentration of employment (1.10) in advanced engineering and manufacturing (SIC codes 20, 21, 26, 27, 28, 29, 30, 33, and 71.12). It is possible that the ~~proposed development~~ Proposed development will feature activities related to these sectors.

### Income

- 7.4.50 The *Annual Survey of Hours and Earnings* (ONS, 2024) reports a significant disparity between resident and workplace earnings in the Vale of Glamorgan. ~~The~~ In 2023, the median annual salary of a Vale of Glamorgan resident in full-time employment is £~~30,578~~34,100, compared to £~~27,039~~32,800 for Wales. Conversely, workplace based measures report the median annual salary of someone working full-time in the Vale of Glamorgan is £~~24,960~~29,400, lower than the figure for Wales (£~~26,346~~32,400) and significantly lower than the resident based figure.
- 7.4.51 This is evidence of out-commuting amongst the high-skill residents of the Vale of Glamorgan, working in high-order occupations outside the area.
- 7.4.52 The *Annual Survey of Hours and Earnings* (ONS,2024) reports a significant disparity between resident and workplace earnings in the CCR. In 2023, the median annual salary of a CCR resident in full-time employment is £30,578, compared to £27,039 for Wales. Conversely, workplace based measures report the median annual salary of someone working full-time in the CCR is £24,960, lower than the figure for Wales (£26,346) and significantly lower than the resident based figure.
- 7.4.53 This is evidence of out-commuting amongst the high-skill residents of the CCR, working in high-order occupations outside the area.

### Commuting

- 7.4.54 Census 2021 was conducted during the coronavirus (COVID-19) pandemic when there was a national lockdown and many travel restrictions were in place to stop the spread of the virus. The pandemic severely impacted some people's ability to work, their working patterns, their workplace and method of travel to work.
- 7.4.55 Census 2021 origin-destination data for travel to work reflect a situation when many more people than at the time of the 2011 Census were working from home. As part of the UK government's measures to reduce the impact of the coronavirus pandemic on the economy, businesses were able to furlough their workforce, this then affected the way furloughed people answered the travel to work questions. There are a number of ways in which this affected census results for travel to work as described in our travel to work quality information for Census 2021.
- 7.4.56 In summary, it is unclear how representative the census statistics are of travel to work patterns on census day itself. Furthermore, census data are a snapshot in time, but, given the impact of lockdown and furlough, the data may have limited utility in measuring pre- or post-pandemic travel patterns. Given the uncertainty associated with Census 2021 origin-destination data, this assessment relies on Census 2011 origin-destination data.

- 7.4.57 Resident based travel to work patterns suggest the Vale of Glamorgan is part of a functional economic area with strong out-commuting links to Cardiff. Census 2011 data on Origin Destination indicates that 55% of Vale of Glamorgan residents that are in employment have a workplace located within the Vale of Glamorgan. This data also indicates that ~~30~~95% of Vale of Glamorgan residents that are in employment have a workplace located in the CCR (30% within Cardiff).
- 7.4.58 Workplace based travel to work patterns indicate that 71% of workers who work in the Vale of Glamorgan are also residents of the Vale of Glamorgan, with 96% living within the CCR (12% living in Cardiff).
- 7.4.59 Of the ~~55~~58,899 Vale of Glamorgan residents in employment, 10% work mainly at or from home and 7% have no fixed place of work (Census 2011, ONS).
- 7.4.60 In the Vale of Glamorgan, 63% of jobs with a fixed workplace outside the home (i.e. excluding those categorised as working from home or 'no fixed place' of work) are filled by residents of the Vale of Glamorgan, and ~~37~~33% are taken by in-commuters from the other CCR local authorities (of which Cardiff = 16%) and 5% taken from outside the CCR (Census 2011, ONS).

## Summary

- 7.4.61 ~~This section has considered the~~ The existing economic conditions at the on-site level and at the Vale of Glamorgan local authority level. The farm is currently operating as a going concern and is anticipated to support 4 employees in the Agriculture sector. This level of employment is estimated to support approximately £~~96,300~~104,000 in gross wages and £205,400 in gross GVA.
- 7.4.62 Overall, the Vale of Glamorgan economy contributed approximately £2.02 billion in GVA to the Welsh economy in 20~~15~~22, with a GVA per job figure ~~almost equal to~~ lower than the Wales average.
- 7.4.63 The Vale of Glamorgan has a very strong concentration of businesses and employment in the aerospace and defence sectors, with a relatively high concentration of these indices in the advanced manufacturing and engineering sector.
- 7.4.64 As far as Vale of Glamorgan residents are concerned, there is a relatively high concentration of high-skill residents of the Vale of Glamorgan working in high-order occupations. Employment and economic activity rates in the Vale of Glamorgan are above the Welsh average. The median annual pay of Vale of Glamorgan residents is significantly higher than the Wales average (resident-based), but the median annual pay of someone working full-time in the Vale of Glamorgan is lower than the Wales average (workplace-based). Resident-based travel to work patterns suggest the Vale of Glamorgan is part of a functional economic area characterised by heavy out-commuting to Cardiff.
- 7.4.65 These conditions suggest there is a shortfall of high-order occupations and high value employment opportunities for the residents of the Vale of Glamorgan to occupy, such that residents of the area are forced to travel outside the local authority in order to find suitable employment.
- 7.4.66 Overall, the CCR economy contributed approximately £34.9 billion in GVA to the Welsh economy in 2022, with a GVA per job figure lower than the Wales average.
- 7.4.67 The CCR region has a strong concentration of businesses and employment in the aerospace sector. Similar concentration to the UK in businesses and higher concentration of Employment in advanced engineering and manufacturing. Defence is low concentration (though VoG is high).

## 7.5 Identification and Assessment of Effects

### Proposed development and Refreshed Land Use Mix

- 7.5.1 The land use assumptions which inform the assessment of the proposed development are set out in Table 7.16.

**Table 7.16 – Land use and floorspace assumptions – proposed development**

Use	Floorspace (sq ft)	Floorspace (sq m)	B1a	B1c	B2	B8
B1a Office	~300,000	~29,000	100%			
B8 Trade Counter	~125,000	~12,000				100%
B1a/B8	~200,000	~20,000	10%			90%
B1c/B8	~325,000	~31,000		50%		50%
B2/B8	~750,000	~71,000		50%		50%
<b>Total</b>	<b>~1,700,000</b>	<b>~162,000</b>				

- 7.5.2 These assumptions are the same as those utilised in the planning application.
- 7.5.3 There have been changes to employment sites and associated market demand and working practices since the preparation of the socio-economics EIA. To inform the updated ES, the indicative mix of uses has been refreshed based upon current (2024) market conditions so that a consideration of the effects of the proposed development on socio-economic receptors in current market conditions can be observed.
- 7.5.4 The refreshed land use mix reduces the overall quantum of floorspace from ~163,000 sq. m to ~126,300 sq. m. To ensure the updated ES considers the potential economic impacts associated with the proposed development under current market conditions (i.e. what may be built based upon the current market conditions subject to a grant of consent), the refreshed land use mix has been uplifted to that of the Application.
- 7.5.5 To ensure consistency with the update to the Transport chapter of the Updated ES, the uplift has been applied only to B2 and B8 uses on a proportionate basis.
- 7.5.6 This assessment considers 'low' and 'high' scenarios, whereby the 'low' scenario represents the land use mix estimated to deliver the least economic impacts, and the 'high' scenario the most.
- 7.5.7 In this way, the updated ES fairly assesses a reasonable 'worst case' scenario – which in socio-economics is the least economic impacts, and a reasonable 'maximum' scenario – which in socio-economics is the most economic impacts.
- 7.5.8 The results of uplifting the refreshed land use and floorspace assumptions under a low scenario are set out in Table 7.17, along with the headline land use mix.

**Table 7.17 – Refreshed (uplifted) land use and floorspace assumptions – low socio-economics scenario**

Use	Floorspace (sq m)	B1	B2	B8
Total B1a Area	~9,300	100%		

B1c / B8 hybrid tech / data units	~23,100			100% <sup>3</sup>
B2 / B8 general industrial / warehousing	~70,500			100%
B2 / B8 multi-occupation terraces and standalone units	~34,700			100%
B8 Trade Counter	~24,300			100%
<b>Total</b>	<b>~162,000</b>	<b>5%</b>	<b>–</b>	<b>95%</b>

- 7.5.9 The results of uplifting the refreshed land use and floorspace assumptions under a high scenario are set out in Table 7.18, along with the headline land use mix (which aligns with the Transport Assessment).

**Table 7.18 – Refreshed (uplifted) land use and floorspace assumptions – high socio-economics scenario**

Use	Floorspace (sq m)	B1	B2	B8
Total B1a Area	~9,300	100%		
B1c / B8 hybrid tech / data units	~23,100	100%		
B2 / B8 general industrial / warehousing	~70,500		100%	
B2 / B8 multi-occupation terraces and standalone units	~34,700		100%	
B8 Trade Counter	~24,300			100%
<b>Total</b>	<b>~162,000</b>	<b>20%</b>	<b>65%</b>	<b>15%</b>

- 7.5.10 An indicative assessment of the (uplifted) refreshed land use and floorspace assumptions under low and high scenarios is set out within this section.

### Construction Impacts

## Construction Phase

- 7.5.11 This section considers the economic impacts arising from the construction of the proposed development. Consideration is also given to economic impacts arising from the construction of the proposed development following adjustment to account for current market conditions (“market adjustment”).
- 7.5.12 This is considered separately to the operational phase impacts given the time-limited nature of the construction and engineering works.
- 7.5.13 Economic impacts will be felt through the employment of labour, purchase of materials, and the expenditure of workers and businesses in the local area.
- 7.5.14 All impacts are based on currently available information with any assumptions stated and sourced. The assessment of economic impact can be refined as detailed design work is

<sup>3</sup> Data units is estimated to deliver the least economic impacts. It is assumed the site could support up to two data units.

undertaken. The figures quoted are therefore set out as indicative. Impacts are considered at site level and Vale of Glamorgan local authority level.

~~7.5.15 Impacts are considered at site level and Vale of Glamorgan local authority level.~~

### Reference Case

7.5.16 There is no major construction investment planned at the site in the absence of the proposed development. Therefore, for the construction phase there is no reference case to be assessed.

### Proposed development

7.5.17 The economic impacts arising from the construction of the proposed development are derived from the capital expenditure associated with delivery of the land use assumptions set out in Table 7.16. The (uplifted) refreshed land use mix assumptions set out in Table 7.16 and Table 7.18 are also considered as part of an indicative assessment under current market conditions.

### Costs and Investment

7.5.18 The total cost of the proposed development is estimated as ~~£118–184~~£160 million–£240 million<sup>4</sup>. ~~This is based on Linesight (2018) average UK construction costs per sq m.~~ The total construction and installation period is estimated at 10 years.

7.5.19 The total cost of the (uplifted) refreshed land use mix is estimated as £130 million–£190 million<sup>5</sup>. The total construction and installation period is estimated at 10 years.

### ~~Gross Direct Economic Impacts Construction~~

#### Magnitude

7.5.20 Construction phase impacts are estimated based on the overall scale of development as measured by total construction costs. Assumptions and Methodology are set out in detail within Appendix 1.

7.5.21 Employment impacts are expressed as 'person years' of employment. This measure is used to represent one full time equivalent post for a single year. This approach captures the contract nature of much construction work, encompassing a range of trades on varying contract lengths.

7.5.22 Employment, wage, and GVA impacts are expressed as a range. This reflects the estimated range of the total cost of the proposed development (see paragraph 7.5.18), as different levels of capital expenditure would support different levels of economic impacts.

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<sup>4</sup> Based on average UK construction costs per sq m (Linesight, 2018) inflated to current prices using industry benchmarks (Costmodelling, 2024). See Appendix 1: Assumptions and Methodology for more details.

<sup>5</sup> Based on average UK construction costs per sq m (Costmodelling, 2024). See Appendix 1: Assumptions and Methodology for more details.

7.5.23 Gross direct economic impacts are included for fullness, although they are not assessed for significance as these figures have not been subjected to additionality factors as per HCA guidance. Therefore, only net additional local impacts are assessed for significance.

- **Gross direct impacts<sup>6</sup>:** the anticipated capital investment to deliver the proposed development would support an estimated 780–1,200 person-years of employment within the construction sector over the entire 10 year construction period. This level of direct construction sector employment would support wage generation of between £29 million–£45 million, and GVA output between £56 million–£86 million over the entire construction phase.

This equates to an estimated average of 80–120 person-years of employment annually within the construction sector, which would support wage generation of approximately £2.9 million–£4.5 million per annum, and GVA output of approximately £5.6 million–£8.6 million per annum.

- **Net additional local impacts<sup>7</sup>:** the assessed net local impacts in the Vale of Glamorgan associated with the proposed development would support approximately 590–910 person-years of additional employment to local residents, wages of between £23 million–£35 million, and GVA output of £43 million–£66 million over the construction period.

This equates to an estimated 60–90 person-years of additional employment to residents of the Vale of Glamorgan annually within the construction sector, supporting wages of approximately £2.3 million–£3.5 million per annum, and GVA output of approximately £4.3 million–£6.6 million per annum.

7.5.24 The potential economic impacts associated with the proposed development are summarised in Table 7.16.

7.5.25 Delivery of the (uplifted) refreshed land use mix under the high scenario would support economic impacts (both gross direct and net additional) within the range estimated for the proposed development. Under the low scenario, this would support economic impacts below the range estimated for the proposed development. The estimated economic impacts under current market conditions are set out in full at Table 7.16.

**Table 7.14 – Summary of construction phase economic impacts**

Impact	Per annum		Total	
	Gross direct	Net additional	Gross direct	Net additional
<b>Proposed development</b>				
Jobs (person years)	80–120	60–90	780–1,200	590–910

<sup>6</sup> An estimate of total site-level impact

<sup>7</sup> Net additional local impact is a measure of the total impact likely to be retained in the Vale of Glamorgan. To convert gross direct impacts to net additional local impacts requires adjustments for leakage, displacement/substitution and multiplier effects. As set out in Appendix 1 Assumptions and Methodology.



Wages	£2.9m–£4.5m	£2.3m–£3.5m	£29m–£45m	£23m–£35m
GVA	£5.6m–£8.6m	£4.3m–£6.6m	£56m–£86m	£43m–£66m
<b>Refreshed (uplifted) land use mix</b>				
Jobs (person years)	60–100	40–80	580–980	440–750
Wages	£2.2m–£3.7m	£1.7m–£2.9m	£22m–£37m	£17m–£29m
GVA	£4.2m–£7.1m	£3.2m–£5.3m	£42m–£71m	£32m–£54m

Source: HJA analysis

- 7.5.26 The Construction sector currently supports employment of 2,000 in the Vale of Glamorgan. The identified level of annual net additional employment equates to between 3.0%–4.5% of the Vale of Glamorgan's construction sector employment. The scale of impact on construction employment in the Vale of Glamorgan is assessed as high.
- 7.5.27 The Vale of Glamorgan currently supports employment of 43,440. The identified level of annual net additional employment equates to between 0.1%–0.2% of the Vale of Glamorgan's employment. The scale of impact on employment in the Vale of Glamorgan is assessed as low.
- 7.5.28 In 2023, the median annual salary of a Vale of Glamorgan resident in full-time employment was £34,100. The average salary in the Construction sector is around £38,000 – the jobs and associated earning capacity therefore represent an uplift compared to the Vale of Glamorgan average. The scale of impact on wages in the Vale of Glamorgan is assessed as low.
- 7.5.29 The Construction sector in the Vale of Glamorgan contributed approximately £142 million in GVA to the economy in 2022. The identified level of annual net additional GVA equates to around 3.0%–4.6% of the Vale of Glamorgan's Construction sector annual GVA output. The scale of impact on construction GVA in the Vale of Glamorgan is assessed as high.
- 7.5.30 The Vale of Glamorgan economy contributed approximately £2.2 billion in GVA to the economy in 2022. The identified level of annual net additional GVA equates to around 0.2%–0.3% of the Vale of Glamorgan's annual GVA output. The scale of impact on GVA in the Vale of Glamorgan is assessed as low.
- 7.5.31 Overall, the scale of impact is assessed as medium.
- 7.5.32 Net additional local impacts are assessed at the Vale of Glamorgan level – the spatial extent of the impact is therefore assessed as local (i.e. low magnitude).
- 7.5.33 Whilst construction employment is typically temporary, intermittent, and short-to-medium term, the 10 year construction phase makes this a strategic development that will support employment within the sector over a long term period (i.e. high magnitude).
- 7.5.34 Whilst construction phase impacts are typically predicted to be intermittent, a proportion of construction phase employment will effectively be permanent (and therefore continuous) given the length of construction period. The frequency of the impact is therefore assessed as medium.
- 7.5.35 Overall, the scale of the impact is assessed as medium, the spatial extent is assessed as local (low magnitude), the duration is assessed as long term (high magnitude), and the frequency is assessed as medium. Therefore, the magnitude of the impact is assessed as medium (beneficial).

- 7.5.36 By way of comparison, the magnitude of the impact associated with the (uplifted) refreshed land use mix under both the low and high scenarios is not anticipated to differ substantially from the proposed development. The magnitude of the impact is therefore considered to be unchanged i.e. medium (beneficial).

### **Gross direct employment (person years)**

- 7.5.37 ~~Total construction phase capital expenditure is estimated at £118–£181 million.~~
- 7.5.38 ~~Employment impacts are expressed as 'person years' of employment. This measure is used to represent one full time equivalent post for a single year. This approach captures the contract nature of much construction work, encompassing a range of trades on varying contract lengths. An estimate of person years is generated on the basis of average turnover per worker in the construction sector (£173,758) using the ONS Annual Business Survey (2017, latest available). Based on estimated turnover per worker for the UK construction sector the anticipated level of capital expenditure will support approximately 675–1,050 person years of construction sector employment. This gross direct impact will be spread across the anticipated 10 year construction phase. This equates to an average annual requirement for 68–104 person years of employment.~~

### **Gross direct wages**

The latest data from the Annual Survey of Hours and Earnings (ONS, 2018) has been used to determine **Gross direct GVA**

- 7.5.39 ~~Gross Value Added is a measure of local economic output. The latest data from the Annual Business Survey (ONS, 2019) has been used to determine the GVA impacts associated with this employment, using the quotient of aGVA and average employment during the year for the Construction sector (£66,691).~~
- 7.5.40 ~~Gross direct GVA is estimated at £45–£69 million over the entire construction phase. This equates to average annual GVA of £4.5–£6.9 million.~~

### **Summary of gross direct construction phase**

- 7.5.41 ~~The potential economic impacts It is estimated the development will generate the capacity to support an annual average of 68–104 person years of employment in the Vale of Glamorgan during associated with the construction phase. This proposed development are set out in turn could support £2.2–£3.4 million in wages and £4.5–£6.9 million in GVA annually for the estimated 10 years construction phase. Table 7.16.~~

Table 7.15 — Summary of gross direct construction phase economic impacts

Impact	Total
Jobs (person years)	≈3,225
Wages	≈£94 million
GVA	≈£171 million

Source: HJA analysis

### **Net Additional Economic Impacts (Construction)**

7.5.42 ~~The Construction The impacts outlined above are gross direct impacts. It is best practice to allow for 'additionality' factors in order to arrive at a net additional local impact. This allows an assessment of the net effects at site level and sector currently supports employment of 32,000 in the Vale of Glamorgan area level. This assessment allows for leakage, deadweight, displacement and substitution, and multiplier effects. These are explained in more detail below. Unless otherwise stated assumptions are informed by HCA (2014) Additionality Guide: Fourth Edition.~~

### **Leakage**

7.5.43 ~~Leakage is a measure. The identified level of annual net additional employment equates to around 0.3% of the impacts which 'leak' outside the impact area being considered. For example, jobs which are taken by those living outside the Vale of Glamorgan. Glamorgan's construction sector employment. This equates to a low scale of impact.~~

7.5.44 ~~A 10% reduction to gross direct employment has been made to allow for HQ and project management functions, assuming a lead contractor with a HQ outside the Vale of Glamorgan. The remainder are assumed to be site based.~~

7.5.45 ~~For the remainder, the 2001 Census of Population provides detailed assessment of the origin and destination of workers by sector. Whilst this dataset is now somewhat out of date, it provides some insight into the workings of the economy. At 2001 some 64% of construction workers employed in the Vale of Glamorgan lived within this area. On this basis, leakage is assessed as 36%.~~

7.5.46 ~~The 2011 Census of Population data does not provide the sectoral data. As per paragraph 1.5.34, the latest available Census based commuting data indicates that 63% of jobs with a fixed workplace outside the home are filled by residents of the Vale of Glamorgan.~~

### **Deadweight**

7.5.47 ~~Deadweight is a measure of what impacts would have occurred without the proposed development. There is no major construction investment planned at the site in the absence of the proposed development. Therefore, for the construction phase there is no deadweight to be accounted for.~~

### **Displacement and substitution effects**

7.5.48 ~~Displacement and substitution effects are used to discount the proportion of gross impacts which offset other impacts which would otherwise have occurred. For example, a construction firm securing a contract to work on the proposed development therefore turns down another contract that would otherwise have kept the team gainfully employed. Or a new firm establishes a construction operation to secure a contract and secures an opportunity that would otherwise have gone to another local construction firm.~~

7.5.49 ~~The primary concern in this analysis is with substitution effects upon local construction firms—this is assumed as very low. Therefore, a 'very low' displacement deduction of 10% has been applied at the Vale of Glamorgan level.~~

### **Multipliers**

7.5.50 ~~Multipliers are a tool used to assess the ongoing and repeated effects of expenditure in the economy through supply chains and by workers. In this analysis we are using Type II multipliers~~

which incorporate both the supply chain (indirect) effects of investment and the induced effects as incomes earned by workers are spent in the local economy.

7.5.51 The construction sector has particularly high multipliers, with high levels of locally retained expenditure. This reflects the local sourcing of labour and the expenditure of earned incomes in the local area, as well as the often localised purchase of building materials, particularly non-specialised materials.

7.5.52 A multiplier of 1.5 is therefore applied at the Vale of Glamorgan level.

#### Summary of net additional economic impacts

7.5.53 The assumptions outlined above are applied to the gross direct effects previously set out.

7.5.54 This in turn could support £1.7–£2.6 million in wages and £3.5 million–£5.4 million in GVA annually for the estimated 10 year construction phase. It is estimated the development will generate the capacity to support an annual average of 53–81 person years of employment for the Vale of Glamorgan.

Table 7.16—Summary of net additional phase economic impacts

Impact	Annual	Total
Employment (person years)	53–81	527–809
Wages	£1.7–£2.6 million	£17–£26 million
GVA	£3.5–£5.4 million	£35–£54 million

Source: HJA analysis

#### Sensitivity

7.5.55 Employment in the construction sector within the Vale of Glamorgan declined during the period 2015–2022. This could be a result of a lack of capital investment in the sector, or it could be a result of older workers exiting the workforce. The construction sector's performance over recent years suggest it would benefit significantly from an investment at the level of the proposed development, however there is a possibility the sector may not be in a position to respond to increased demand resulting from such capital investment. The vulnerability of the receptor is therefore assessed as medium.

7.5.56 Construction employment can be temporary in nature. The workforce is likely to be engaged in construction works associated with other schemes before, during, and after their involvement with the proposed development. Once the proposed development is delivered, the construction sector workforce supply would not return to its previous state, even if demand (as a result of capital investment) reduces, since the relationship between supply and demand in labour markets is non-linear. However, some workers may respond to a decline in demand by seeking employment in alternative industries or locations. Therefore, recoverability is considered to be medium.

7.5.57 The construction sector contributes to economic output, employment, local development, infrastructure, and innovation. Therefore, providing the workforce to sustain the sector is important. Whilst growth in construction activities is not an explicit policy ambition within the Vale of Glamorgan, economic ambitions and strategic housing and employment allocations to support population and economic growth inherently rely upon the construction sector for delivery. Therefore, the value of the receptor is assessed as high.

- 7.5.58 Overall, the vulnerability of the receptor is assessed as medium, the recoverability of the receptor is assessed medium, and the value and importance of the receptor is assessed as high. The overall sensitivity of the receptor is therefore assessed as medium.
- 7.5.59 ~~The construction sector in the Vale of Glamorgan currently comprises 2,250 jobs. The average annual requirement for construction labour is therefore equivalent to up to 4.6% of the Vale of Glamorgan construction labour force.~~
- 7.5.60 ~~It is estimated the development will generate the capacity to support an annual average of 53–81 person-years of employment for the Vale of Glamorgan.~~
- 7.5.61 ~~Jobs (person years): There is no evidence of weakness in the Construction sector in the Vale of Glamorgan, and increasing employment opportunities in the sector is not seen as a policy priority. Therefore, the value of the receptor is considered to be low. It is estimated the development will generate 53–81 person-years of employment for the Vale of Glamorgan on an annual basis for the 10-year construction phase. On the basis of the net figures for construction sector employment in Table 7.10, this is approximately 2.4%–3.6% of construction employment in the Vale of Glamorgan for a period of 10 years. Therefore, the magnitude of the impact is deemed to be medium-beneficial. The effect is therefore assessed to be of minor (beneficial) significance, which is not significant in EIA terms. The effect is assessed as long term given that the construction phase is expected to last for 10 years.~~

### Significance

- 7.5.62 Overall, the magnitude of the impact is assessed as medium (beneficial) and the sensitivity of the receptor is assessed as medium. The overall effect is therefore assessed to be of moderate (beneficial) significance. This is significant in EIA terms.
- 7.5.63 The magnitude of the impact associated with the (uplifted) refreshed land use mix under both the low and high scenarios is assessed as medium (beneficial), and the sensitivity of the receptor is assessed as medium. The overall significance of effect would therefore be assessed as moderate (beneficial). This is significant in EIA terms.
- 7.5.64 ~~Overall, the value of the receptor is considered to be low and the magnitude of the impact is deemed to be medium (beneficial). The effect is therefore assessed to be of minor (beneficial) significance, which is not significant in EIA terms. The effect is -, assessed as long term.~~

### Operational Impacts

- 7.5.65 This section considers the economic impacts arising from the on-going operation of the proposed development. There ~~will~~ **is estimated to** be a range of direct on-site impacts including jobs, wages, and GVA arising from activities taking place within the employment premises delivered as part of the proposed development.

### Reference Case

- 7.5.66 To gauge the benefit of the proposed development, it is necessary to establish the 'reference case' scenario in which the proposed development does not go ahead (TAN 23, 2014). In the event that the proposed development does not come forward, it is anticipated the application site will continue to support agricultural activities ('the farm').
- 7.5.67 The reference case is outlined in more detail in section ~~7.5. The assumptions relating to Net Additional Economic Impacts (Operational) outlined later on~~ 7.4. It is estimated the farm would

support 4 employees in ~~this section have been applied to the conditions detailed in section 7.5 to derive the net additional impacts~~ Agriculture sector as a going concern, and it is estimated that 3 of ~~the continued operation~~ these jobs are filled by residents of the ~~farm~~ Vale of Glamorgan (i.e. net additional local effects).

- 7.5.68 It is assumed that should the development go ahead ~~the farm~~ farming operations on the Application Site will cease to operate as a going concern and the associated economic impacts will be lost.

### Proposed development

- 7.5.69 The economic impacts arising from the construction of the proposed development are derived from the capital expenditure associated with delivery of the land use assumptions set out in Table 7.14. The (uplifted) refreshed land use mix assumptions set out in Table 7.15 and Table 7.16 are also considered as part of an indicative assessment under current market conditions.

### Magnitude

- 7.5.70 The assumptions used to inform this analysis are set out in further detail at Appendix 1. Net additional local impacts are assessed on the basis of the Vale of Glamorgan.
- 7.5.71 Employment impact estimates associated with the proposed development are unchanged from the Application, since the employment density assumptions utilised to estimate impacts remain unchanged.
- 7.5.72 Wage and GVA impact estimates associated with the proposed development are expressed as a range. This reflects the use of sensitivity analysis to allow for inflation since the Application was first submitted in 2019. Further detail on wage and GVA inflation assumptions is set out at Appendix 1.
- 7.5.73 Employment, wage, and GVA impact estimates associated with the (uplifted) refreshed land use mix are also expressed as a range. This reflects both the use of sensitivity analysis (as above), and consideration of low and high land use mix scenarios.
- 7.5.74 Gross direct economic impacts for the proposed development are included for fullness, although they are not assessed for significance as these figures have not been subjected to additionality factors as per HCA guidance. Therefore, only net additional local impacts associated with the proposed development are assessed for significance.
- **Gross direct impacts:** at full occupancy, the new employment floorspace could accommodate approximately 4,400 FTE jobs. This level of employment would support wages of around £150 million per annum<sup>8</sup>, and GVA output of between £190 million–£270 million per annum.
  - **Net additional local impacts:** applying the additionality assumptions set out in Appendix 1 to the estimated gross direct impacts in the Vale of Glamorgan resulting from the new employment floorspace estimates a net additional local impact of approximately

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<sup>8</sup> Unrounded wage impacts, including sensitivity testing, are estimated at between £151 million–£153 million. However, rounding to avoid reporting estimates with spurious levels accuracy results in no range.



3,200 FTE jobs, supporting wages of around £110 million per annum, and GVA output between £140 million–£200 million per annum.

7.5.75 The potential economic impacts associated with the proposed development are summarised in Table 7.18.

7.5.76 Delivery of the (uplifted) refreshed land use mix under the low scenario would support approximately half the employment, wage, and GVA impacts estimated for the proposed development (both gross direct and net additional). Delivery of the (uplifted) refreshed land use mix under the high scenario would support very similar levels of employment, wage, and GVA impacts estimated for the proposed development (both gross direct and net additional). The estimated economic impacts under the (uplifted) refreshed land use mix are set out in full at Table 7.18.

**Table 7.17 – Summary of net additional direct operation phase economic impacts (per annum) ~~(per annum)~~**

Impact	Gross direct	Net additional
<b>Proposed development</b>		
Jobs (FTE)	4,200	3,200
Wages	£150m	£110m
GVA	£190m–£270m	£140m–£200m
<b>Refreshed (uplifted) land use mix</b>		
Jobs (FTE)	2,100–4,100	1,600–3,100
Wages	£71m–£150m	£52m–£110m
GVA	£90m–£300m	£66m–£220m

Source: HJA analysis

7.5.77 This level of net additional local employment would increase the Vale of Glamorgan's workplace employment by approximately 7.4%. Between 2012–2022, workplace employment in the Vale of Glamorgan increased by around 0.9% per annum. Therefore, on a single site the assessed level of gross direct employment impacts would support around 8 years of typical employment growth within the Vale of Glamorgan. This equates to a high scale of impact.

7.5.78 In 2023, the median annual salary of a Vale of Glamorgan resident in full-time employment was £34,100. The average salary associated with jobs supported by the operation phase is between £36,600–£37,500 – the jobs and associated earning capacity therefore represent an uplift compared to the Vale of Glamorgan average. This equates to a low scale of impact.

7.5.79 The Vale of Glamorgan economy contributed approximately £2.2 billion in GVA to the economy in 2022. The identified level of annual net additional GVA equates to around 6.2%–9.1% of the Vale of Glamorgan's annual GVA output. This equates to a high scale of impact.

7.5.80 Overall, the scale of impact is assessed as high.

7.5.81 Net additional local impacts are assessed at the Vale of Glamorgan level. The spatial extent of the impact is therefore assessed as low.

- 7.5.82 The duration of operation phase economic impacts are assumed to be long term (i.e. high magnitude).
- 7.5.83 Operation phase economic impacts are assumed to be continuous and permanent. The frequency of the impact is therefore assessed as high.
- 7.5.84 Overall, the scale of the impact is assessed as high, the spatial extent is assessed as local (i.e. low magnitude), the duration is assessed as long term (i.e. high magnitude), and the frequency is assessed as continuous and permanent (i.e. high magnitude). Therefore, the magnitude of the impact is assessed as high (beneficial).
- 7.5.85 By way of comparison, the magnitude of the impact associated with the (uplifted) refreshed land use mix under the high scenario is not anticipated to differ from the proposed development. The magnitude of the impact is therefore considered to be unchanged i.e. high (beneficial).
- 7.5.86 Whilst the impact associated with the (uplifted) refreshed land use mix under the low scenario is estimated to be approximately half the level identified for the proposed development, this would still be anticipated to support around 4 years of typical employment growth in the Vale of Glamorgan on a site, along with supporting a 3% increase in GVA output within the Vale of Glamorgan. As such, the scale of impact would also be assessed as high. Since the spatial extent, duration, and frequency would remain the same, the magnitude of the impact associated with the (uplifted) refreshed land use mix under the low scenario would be assessed as high (beneficial), too.

## Assumptions

- 7.5.87 ~~The economic impacts arising from the operation of the proposed development are derived from the Master Plan Plot Outlines provided by RPS. The details relevant to this assessment are summarised in Table 7.13~~

**Table 7.18 – Plot use and floorspace assumptions**

Use	Floorspace (sq ft)	Floorspace (sq m)
B1a-Office	~300,000	~29,000
B8-Trade-Counter	~125,000	~12,000
B1a/B8	~200,000	~20,000
B1c/B8	~325,000	~31,000
B2/B8	~750,000	~71,000

**Table 7.19 – Indicative floorspace densities**

Use	Per-FTE	Area
B1a-Office	12 sq m	NIA
B1c-Industrial	47 sq m	NIA
B2	36 sq	GIA
B8	77 sq	GEA
B8-Trade-Counter	70 sq m	GEA

Source: HCA

- 7.5.88 In order to assess the impact of the proposed development in terms of wages, an indicative wage by use class was established. This was achieved by, in the first instance, establishing a sector-based indicative distribution of employment by use class for the Vale of Glamorgan, using BRES data. Then, for each use class, this distribution was combined with the median annual gross pay figure for each sector from ASHE in order to establish an indicative wage by use class. The figures used are detailed in Table 7.15 below.

**Table 7.20 – Indicative wage by use class**

- 7.5.89 A similar method was used to establish an indicative GVA per worker by use class. The same sector-based indicative distribution of employment by use class for the Vale of Glamorgan was combined with a sector-based GVA per worker figure derived from the ABS, establishing an indicative GVA per worker by use class. The figures used are detailed in Table 7.16 below.

**Table 7.21**

Use	GVA per worker
B1a Office	£61,671
B1c Industrial	£58,399
B2	£65,339
B8 (inc. Trade Counter)	£45,807

Source: HJA analysis

### Gross Direct Economic Impacts (Operation)

- 7.5.90 Gross direct economic impacts are included for fullness, although are they are not assessed for significance as these figures have not been subjected to additionality factors as per HCA guidance. Therefore, only net additional impacts are assessed for significance.

### Gross direct FTE employment

- 7.5.91 Based on standard workspace employment densities the anticipated level of employment floorspace could create the capacity to accommodate approximately 4,375 FTE jobs.

### Gross direct wages

- 7.5.92 The method for establishing an indicative wage by use class is described in more detail in paragraph 1.7.8.

- 7.5.93 Based on these indicative figures, the anticipated level of employment could support approximately £127 million in wages.

### Gross direct GVA

- 7.5.94 The method for establishing the GVA per worker by use class is described in more detail in paragraph 1.7.9.

- 7.5.95 Based on these indicative figures, the anticipated level of employment could support approximately £232 million in GVA.

## Summary of gross direct operational phase economic impacts

- 7.5.96 It is estimated the development could generate capacity for approximately 4,375 FTE jobs in the Vale of Glamorgan, supporting approximately £127 in wages and £232 million in GVA annually.

**Table 7.22 — Summary of gross direct operational phase economic impacts**

Impact	Total
FTE jobs	~4,375
Wages	~£127 million
GVA	~£232 million

Source: HJA analysis

## Net Additional Economic Impacts (Operation)

- 7.5.97 The impacts outlined above are gross direct impacts. It is best practice to allow for 'additionality' factors in order to arrive at a net additional local impact. This allows an assessment of the net effects at site level and Vale of Glamorgan area level. This assessment allows for leakage, deadweight, displacement and substitution, and multiplier effects. These are explained in more detail below. Unless otherwise stated assumptions are informed by HCA (2014) Additionality Guide: Fourth Edition.

### Leakage

- 7.5.98 Leakage is a measure of the impacts which 'leak' outside the impact area being considered. For example, jobs which are taken by those living outside the Vale of Glamorgan.
- 7.5.99 The 2011 Census of Population indicated that 63% of all jobs with a fixed workplace outside the home in the Vale of Glamorgan are filled by residents of the county. Therefore, a leakage value of 37% has been adopted.

### Deadweight

- 7.5.100 Deadweight is a measure of what impacts would have occurred without the proposed development. Following the application of all other additionality factors the assessed impacts of the reference case are deducted to arrive at a net additional figure. The reference case is discussed in more detail earlier in this section.

### Displacement and substitution effects

- 7.5.101 Displacement and substitution effects are used to discount the proportion of gross impacts which offset other impacts which would otherwise have occurred. Some displacement and substitution effects are anticipated, however the intention is that the proposed development would primarily serve firms that currently operate outside the study area. Therefore, a 'very low' Displacement and Substitution value of 10% has been adopted.

### Multipliers

- 7.5.102 Multipliers are a tool used to assess the ongoing and repeated effects of expenditure in the economy through supply chains and by workers. Type II multipliers are used in this analysis,

which incorporate both the supply chain (indirect) effects of investment and the induced effects as incomes earned by workers are spent in the local economy. A medium multiplier factor is assumed, which is 1.3 at the Vale of Glamorgan level.

### Summary of net additional operational phase economic impacts

- 7.5.103 The assumptions outlined above are applied to the gross direct impacts to derive net additional impacts at the Vale of Glamorgan level.
- 7.5.104 It is estimated the development will create capacity to accommodate around 3,225 net additional FTE jobs for the Vale of Glamorgan, supporting approximately £94 million in net additional wages and £171 million in net additional GVA.

**Table 7.23 — Summary of net additional operational phase economic impacts**

Impact	Total
FTE employment	~3,225
Wages	~£94 million
GVA	~£171 million

Source: HJA analysis

- **FTE Employment:** Achieving sustainable economic growth through the creation of good quality employment opportunities has been established as a policy priority. The baseline conditions have established there is an economic weakness by way of a shortfall in high value jobs within the local authority area available to residents of the Vale of Glamorgan. The proposed development has the capacity to accommodate a significant number of high value jobs, and support stronger connectivity between the Enterprise Zone and Cardiff Airport, therefore aligning with policy priorities and improving economic conditions in the Vale of Glamorgan. Therefore, the value of the receptor is considered to be high. It is estimated the proposed development will create capacity to accommodate approximately 3,225 net additional FTE jobs for the Vale of Glamorgan. On the basis of the figures for total employment in paragraph 7.5.17, this is approximately 6.6% of total employment in the Vale of Glamorgan. Therefore, the magnitude of the impact is deemed to be high beneficial. The effect is therefore assessed to be of major (beneficial) significance, which is significant in EIA terms. The effect is assessed as long term (i.e. over 5 years).
- **Wages:** Increasing the earning potential of every individual and redressing economic disadvantage has been established as a policy priority. The baseline conditions have established there is an economic weakness by way of a workplace-based median annual wage well below the Wales average. The proposed development has the capacity to support significant earning potential for employees in sectors that will pay in excess of the current average for the Vale of Glamorgan, therefore aligning with policy priorities and improving what is currently a weakness in the Vale of Glamorgan economy. Therefore, the value of the receptor is considered to be high. The magnitude of the

~~impact is deemed to be high beneficial. The effect is therefore assessed to be of major (beneficial) significance, which is significant in EIA terms. The effect is assessed as long term.~~

- ~~• GVA: Increasing innovation and research and development activities throughout the economy by encouraging the establishment of sectoral clusters has been established as a policy priority. The baseline conditions have established there is an economic weakness in the Vale of Glamorgan by way of a GVA per job figure slightly below the Wales average but well below the UK average. Therefore, the value of the receptor is considered to be high. It is estimated the proposed development will create capacity to support approximately £171 million in GVA for the Vale of Glamorgan economy. On the basis of the figure for GVA in paragraph 7.5.9, this is approximately 8.4% of total GVA for the Vale of Glamorgan. Therefore, the magnitude of the impact is deemed to be high beneficial. The effect is therefore assessed to be of major (beneficial) significance, which is significant in EIA terms. The effect is assessed as long term.~~

## Sensitivity

- 7.5.105 The Vale of Glamorgan is well-positioned to benefit from positive impacts, such as new employment opportunities. The Vale of Glamorgan's skilled workforce and economic base could support and sustain new economic activities.
- 7.5.106 The capacity of the Vale of Glamorgan's economy to accommodate potentially beneficial impacts on employment, wages, and GVA is assessed as high. The vulnerability of the receptor is therefore assessed as low.
- 7.5.107 In the context of beneficial socio-economic impacts, the concept of recoverability differs from the majority of other topics. If the proposed development results in beneficial changes, such as job creation, higher wages, and overall economic growth, the desirability of returning to a pre-impact condition diminishes. Instead, the goal would be to sustain and build upon these beneficial changes. In this situation, high recoverability would be less relevant and potentially undesirable, as it would imply a return to less favourable conditions. The focus would shift to enhancing and maintaining the improved conditions brought about by the proposed development. Therefore, while the Vale of Glamorgan's labour market is likely to be capable of recovering in the unlikely event of adverse economic impacts occurring, in the case of beneficial impacts the aim should be to support continuous improvement and prevent regression to pre-impact conditions.
- 7.5.108 Considering the dual nature of recoverability within socio-economics, recoverability is assessed as medium.
- 7.5.109 Economic conditions in the Vale of Glamorgan are of high socio-economic value. Stable employment rates and a skilled workforce contribute positively to the local economy and community well-being. The ability of the local authority area to attract and retain a skilled workforce is also a key factor in its ongoing economic development and competitiveness. These points are reflected in local policy.
- 7.5.110 The value and importance of employment in the Vale of Glamorgan is therefore assessed as high.

- 7.5.111 Overall, the vulnerability of the receptor is assessed as low, the recoverability of the receptor is assessed as medium, and the value of the receptor is assessed as high. Therefore, the sensitivity of the receptor is assessed as medium.

### Significance

- 7.5.112 Overall, the magnitude of the impact is assessed as high (beneficial), and the sensitivity of the receptor is assessed as medium. The overall effect is therefore assessed to be of moderate (beneficial) significance. This is significant in EIA terms.
- 7.5.113 The magnitude of the impact associated with the (uplifted) refreshed land use mix under both the low and high scenarios is assessed as high (beneficial), and the sensitivity of the receptor is assessed as medium. The overall significance of effect would therefore be assessed as moderate (beneficial). This is significant in EIA terms.

## 7.6 Risk of Accidents or Disasters

- 7.6.1 It is not considered likely that there will be construction or operation-stage accidents and/or disasters that would cause significant impact on socio-economic receptors. The design of the proposed development will accord with all relevant legislation to ensure that it incorporates all necessary safety requirements and is future proofed against change in future climate.

## 7.7 Cumulative Effects

- 7.7.1 ~~With regard to cumulative impact, the Screening Report and associated correspondence included at Appendix 1.1 and Appendix 1.2 respectively is clear that there are no outstanding planning applications, approved or committed development on allocated land to the north of the application site and it could, feasibly proceed in isolation to the remainder of the allocation. Therefore it is appropriate to consider its impact in isolation of the remainder of the allocated land and there are no anticipated cumulative effects.~~
- 7.7.2 This section assesses the potential cumulative effects associated with the proposed development alongside relevant cumulative developments on the CEA longlist, and more generally the strategic economic approach within the CCR area<sup>9</sup>.
- 7.7.3 The following table (Table 7.19) out the relevant developments that may have cumulative impacts to those of the Proposed development which have been screened into the assessment.

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<sup>9</sup> The underpinning rationale for assessing potential cumulative effects during the construction phase does not alter between the cumulative development long list and CCR levels. Therefore, potential cumulative effects at CCR level are assessed for the operation phase only.



**Table 7.24 – Screened-in cumulative developments, socio-economics**

Application	Description	Distance	Tier	Justification for inclusion
Candidate Site 361: Land at Port Road, Rhoose	This is currently a candidate site. It is an existing allocation that is unimplemented but likely to be rolled forward into the RLDP as part of a major employment allocation. Circa 3 ha allocation for 'other uses'	0.1km	3	<p>The cumulative development has the potential to support employment opportunities in similar parts of the economy during both the construction and operation phases.</p> <p>Whilst the cumulative development site is small, its proximity to the Proposed development makes this scheme relevant.</p>
2024/00329/FUL: Cardiff and Vale College Advanced Technology Centre at Cardiff Airport	Proposed development of the CaVC Advanced Technology Centre (ATC)	0.3 km	1	<p>The cumulative development has the potential to support employment opportunities during both the construction and operation phases.</p> <p>The cumulative development's proximity to the Proposed development, and its focus on advanced technology, makes this scheme relevant.</p>
2022/00733/FUL: Land North of the railway line, Rhoose	Erection of 247 new homes, open space, landscaping, access roads and paths and associated infrastructure.	1 km	1	<p>The cumulative development has the potential to support employment opportunities during the construction phase.</p> <p>The cumulative development's proximity to the Proposed development makes this scheme relevant.</p> <p>The scheme's land use (residential) means there is unlikely to be direct relevance with the Proposed development during the operation phase.</p>
DNS/3273713: Land at Pen-Onn Solar Farm, Llancarfan, CF62 3AG	Erection of Solar Farm (48 MW) and associated works	2.25 km	1	<p>The cumulative development has the potential to support employment opportunities during the construction phase.</p> <p>Whilst the land use (energy) differs from the Proposed development, capital expenditure associated with the cumulative development is similarly anticipated to overlap with the construction supply chain e.g. aggregates, haulage plant hire etc, making this scheme relevant.</p>

Application	Description	Distance	Tier	Justification for inclusion
				However, the scheme's land use (energy) means there is unlikely to be direct relevance with the Proposed development during the operation phase.
CAS-01391-M3G6Q9: Fonmon / East Aberthaw Solar	Solar Farm with a potential generating capacity of circa 35MW	2.5 km	1	As above.
Candidate Site 554: The Port of Barry	"179 ha allocated site made up of 5 elements: 1. The Port Access Project 2. The Marina 3. The Mole 4. Black Rocks Growth Zone 5. The Clean Growth Hub"	4km	3	<p>The cumulative development has the potential to support employment opportunities during the operation phase. It is unlikely the construction phase will overlap with the Proposed development.</p> <p>The cumulative development's relative proximity to the Proposed development makes this scheme relevant.</p> <p>The quantum of land allocated as part of the cumulative development, along with its relative proximity to the Proposed development, makes this scheme relevant.</p>
Candidate Site 433: Aberthaw Power Station	189 ha site identified in draft preferred strategy for a green energy park. It is considered reasonably likely to come forward but limited info is available.	4km	3	<p>The cumulative development has the potential to support employment opportunities during the operation phase. It is unlikely the construction phase will overlap with the Proposed development.</p> <p>The cumulative development's relative proximity to the Proposed development makes this scheme relevant.</p> <p>The quantum of land allocated as part of the cumulative development, along with its relative proximity to the Proposed development, makes this scheme relevant.</p>
2022/00278/RG3: Docks Office, Subway Road, Barry	Transport interchange to integrate bus and rail travel. The transport interchange will utilise the existing council ground level car park area to the east of the Docks offices, creating a circulatory route for buses	4.5 km	1	The cumulative development has the potential to support employment opportunities during the operation phase. It is unlikely the construction phase will overlap with the Proposed development.

Application	Description	Distance	Tier	Justification for inclusion
	and taxis, with a central landscaped area with seating, cycle stands and allowing for potential cycle hub / cafe unit and 'Next-bikes' in the future (this would be a separate planning application). The scheme will also have secure cycle lockers and future proof for electric vehicle charging of both buses and taxis. New bus shelters with interactive displays, and new LED lighting to current standards will also be installed.			<p>The cumulative development's relative proximity to the Proposed development makes this scheme relevant.</p> <p>The scheme's land use (transport and public realm) means there is unlikely to be direct relevance with the Proposed development during the operation phase.</p>
2019/01260/HYB: Land between Aston Martin Lagonda and taxiway echo (Keithrow), Bro Tathan Business Park, St. Athan	Hybrid planning application comprising: full planning permission for the demolition of existing structures and for the construction of a new service road, building slab/apron and associated drainage; and outline planning permission for erection of up to 40,000 sqm gross air-side operational employment facilities (Class B1 and/or Class B2 and/or Class B8), vehicle parking, servicing and all associated building and engineering works with all other matters reserved.	7.5 km	1	<p>The cumulative development has the potential to support employment opportunities during the operation phase. It is unlikely the construction phase will overlap with the Proposed development.</p> <p>The cumulative development's relative proximity to the Proposed development makes this scheme relevant.</p> <p>The quantum of floorspace associated with the application, along with its relative proximity to the Proposed development, makes this scheme relevant.</p>
2023/00780/FUL: Land North of Ffordd Bro Tathan, St. Athan	Demolition of existing buildings/structures and erection of a Class B8 data centre with all associated back-up generators, plant, equipment, sub-stations, accesses, parking and servicing areas, drainage and engineering works including services diversion/connection and regrading works (Full Planning Application)	7.5 km	1	<p>The cumulative development has the potential to support employment opportunities during the operation phase. It is unlikely the construction phase will overlap with the Proposed development.</p> <p>The cumulative development's relative proximity to the Proposed development makes this scheme relevant.</p> <p>The scheme's land use (data centre) means there is a possibility of direct relevance with the Proposed development during the operation phase given that data centre is listed as a potential use within the Proposed development Application.</p>

## Construction phase

### Cumulative development long list

7.7.4 The following cumulative developments have been identified as relevant during the construction phase:

- Candidate Site 361: Land at Port Road, Rhooose
- 2024/00329/FUL: Cardiff and Vale College Advanced Technology Centre at Cardiff Airport
- 2022/00733/FUL: Land North of the railway line, Rhooose
- DNS/3273713: Land at Pen-Onn Solar Farm, Llancarfan, CF62 3AG
- CAS-01391-M3G6Q9: Fonmon / East Aberthaw Solar

### Magnitude

7.7.5 Along with the Proposed development, the identified cumulative developments would provide additional capital expenditure that would support further jobs for construction workers, engineers, project managers, and other associated trades. This is expected to increase demand for local goods and services, increasing benefits to local businesses, and generating a greater positive multiplier effect across the economy.

7.7.6 As per section 7.5, the magnitude of impact for the Proposed development in isolation is assessed as medium (beneficial). Given the identified cumulative developments are likely to provide additional beneficial impacts, the magnitude of potential beneficial cumulative impacts associated with construction of the Proposed development is also assessed as medium (beneficial).

### Sensitivity

7.7.7 One potential vulnerability associated with delivery of multiple developments within the same area during the same period of time is an increase in demand for construction materials, labour, and services. This increased demand could lead to material shortages and increased costs, potentially delaying delivery of concurrent projects within the region.

7.7.8 However, the construction sector at large operates in a manner that can typically respond flexibly to changes in conditions. Construction sector demand supports an industry characterised by a mobile workforce that moves from project to project as required, sometimes involved in the delivery of multiple concurrent projects. If a scheme is brought forward where labour and supply chain demands cannot immediately be met from within the local construction sector, there are steps that can be taken by the construction industry:

- Construction firms can engage in planning and forecasting to ensure the timely availability of materials and labour. This is typically achieved via Resource Management Plans, which includes sourcing strategies, phased development plans, and measures to ensure steady supply without disrupting local markets.

- Construction firms can diversify their supply chains. This involves sourcing materials from multiple suppliers – locally, nationally, and internationally – to ensure a reliable supply and competitive pricing. Establishing long-term contracts with suppliers can also provide price stability and priority access to materials.
- In response to labour shortages, construction firms can recruit from a broader geographic area, including regional, national, or even international recruitment. Additionally, investing in local training programs and apprenticeships can build a skilled workforce over time, reducing dependency on external labour markets and supporting local employment.
- Construction firms can collaborate with local authorities, national governments, key stakeholders, and other construction projects to coordinate labour and material requirements.

7.7.9 Potential challenges with resourcing multiple projects should not be a barrier to the development of strategic employment sites – this would overlook the potentially significant strategic and economic benefits of a promising development pipeline. Instead, a comprehensive approach that includes appropriate mitigation measures, stakeholder engagement, and adaptive management can address many challenges effectively. Consenting decisions should balance consideration of both the potential adverse effects (which can be mitigated), and the long-term benefits to the area.

7.7.10 Each development should aim to make a positive economic contribution while ensuring sustainable and manageable delivery approaches via Resource Management Plans. In a situation where each individual development incorporates such an approach into its proposed development, any additional vulnerability to the receptor is assumed to be negligible.

7.7.11 As per section 7.5, the vulnerability of the receptor is assessed as medium, the recoverability of the receptor is assessed medium, and the value and importance of the receptor is assessed as high. The overall sensitivity of the receptor is therefore assessed as medium.

### Significance

7.7.12 Overall, the magnitude of the cumulative impact is assessed as medium (beneficial), and the sensitivity of the receptor is assessed as medium. The overall cumulative effect is therefore assessed to be of moderate (beneficial) significance. This is significant in EIA terms.

## Operation phase

### Cumulative development long list

7.7.13 The following cumulative developments have been identified as relevant during the construction phase:

- Candidate Site 361: Land at Port Road, Rhose
- 2024/00329/FUL: Cardiff and Vale College Advanced Technology Centre at Cardiff Airport
- Candidate Site 554: The Port of Barry

- Candidate Site 433: Aberthaw Power Station
- 2022/00278/RG3: Docks Office, Subway Road, Barry
- 2019/01260/HYB: Land between Aston Martin Lagonda and taxiway echo (Keithrow), Bro Tathan Business Park, St. Athan
- 2023/00780/FUL: Land North of Ffordd Bro Tathan, St. Athan

### **Magnitude**

- 7.7.14 Along with the proposed development, the identified cumulative developments would provide additional land and employment floorspace that would support further jobs across the economy. This is expected to increase demand for local goods and services, increasing benefits to local businesses, and generating a greater positive multiplier effect across the economy.
- 7.7.15 As per section 7.5, the magnitude of impact for the proposed development in isolation is assessed as high (beneficial). Given the identified cumulative developments are likely to provide additional beneficial impacts, the magnitude of potential beneficial cumulative impacts associated with the operation phase of the proposed development is also assessed as high (beneficial).

### **Sensitivity**

- 7.7.16 A lack of sufficient employment sites and premises has the potential to constrain the capacity for economic growth, particularly in sectors such as logistics and advanced manufacturing. Insufficient supply may limit opportunities for new businesses to establish, and result in a loss of inward investment and economic development. Without sufficient new employment sites and premises, existing premises may face increased pressure to accommodate a growing business population. This could lead to inefficiencies, with businesses operating in unsuitable or overcrowded premises, potentially affecting productivity and long-term sustainability.
- 7.7.17 Maintaining a flexible approach to employment land provision is important to ensuring the receptor can accommodate changes. The Local Development Plan, and its evidence base, provides primary policy mechanism for maintaining a flexible approach to delivery. The Vale of Glamorgan Council is therefore in a position to ensure that risks associated with under-delivery of sites and premises can be avoided. The identified cumulative projects therefore present the Vale of Glamorgan Council with an opportunity to maintain the required flexible approach. Therefore, the vulnerability of the receptor is assessed as low.
- 7.7.18 As per section 7.5, the recoverability of the receptor is assessed as medium, and the value of the receptor is assessed as high.
- 7.7.19 Therefore, the sensitivity of the receptor is assessed as medium.

### **Significance**

- 7.7.20 Overall, the magnitude of the cumulative impact is assessed as high (beneficial), and the sensitivity of the receptor is assessed as medium. The overall cumulative effect is therefore assessed to be of moderate (beneficial) significance. This is significant in EIA terms.

### **Cardiff Capital Region**

- 7.7.21 The Proposed development supports CCR's key sectors. The construction of a large quantum of high-quality floorspace suitable for high-tech, R&D, and innovation led activities is expected

to attract businesses in CCR's priority sectors such as FinTech, MedTech, compound semiconductors, and green technologies. This alignment with priority sectors can further strengthen the region's economic base, supporting innovation and contributing to long-term economic resilience.

- 7.7.22 The proximity to Cardiff Airport presents a strategic advantage compared to developments elsewhere in CCR, offering businesses connectivity for international trade and mobility. This makes the Proposed development a potentially attractive location for multinational companies and exporters that rely on international transportation links. The potential for increased business activity and foreign direct investment associated with the Proposed development could support further integration of the CCR into international supply chains, enhancing the region's competitiveness.
- 7.7.23 The potential to support the creation of high-quality jobs in various priority sectors would have a beneficial impact on CCR's labour market. The Proposed development is estimated to have the potential to accommodate thousands of permanent jobs, potentially contributing to a reduction in unemployment rates and improving economic activity rates. The availability of diverse employment opportunities is also likely to help retain local talent, and attract skilled workers to the region, contributing to the overall strengthening of the economy.
- 7.7.24 The Proposed development is also expected to increase demand for goods and services throughout local supply chains. Local businesses, including SMEs, are likely to benefit from the increased economic activity. The potential presence of high-growth clusters within the Proposed development would increase collaboration, knowledge sharing, and innovation, contributing to CCR's ambitions to support cluster growth.
- 7.7.25 The development is also likely to complement CCR's infrastructure requirements, by necessitating improvements in transport networks, utilities, and digital connectivity, which overall would benefit the wider region.
- 7.7.26 The Proposed development supports CCR's investment priorities by delivering private sector-led development.
- 7.7.27 As per section 7.5, the magnitude of impact for the Proposed development in isolation is assessed as high (beneficial). Given the important contribution of strategic employment sites to economic development, and the potential beneficial economic impacts associated with the development of sites of this nature across the region, the magnitude of potential beneficial cumulative impacts associated with the operation phase of the Proposed development is also assessed as high (beneficial).
- 7.7.28 Given the importance of strategic employment sites within the economic ambitions of CCR, and the vulnerability of these ambitions in the absence of sites coming forward, the sensitivity of the receptor is assumed to be medium.
- 7.7.29 The overall effect is therefore assessed to be of moderate (beneficial) significance. This is significant in EIA terms.

## 7.8 Mitigation Measures and Statement of Residual Effects

- 7.8.1 A loss of existing economic activity on the site will occur in the event of the proposed development going ahead. However, the value and magnitude of this activity is negligible, and is assessed to be vastly outweighed by the ~~major~~ significant beneficial economic effects arising from the operation phase of the proposed development. As such, the residual economic effects are ~~long term major beneficial~~ unchanged from those assessed in section 7.5.



## 7.9 Conclusion

- 7.9.1 This chapter has provided an assessment of the socio-economic impacts associated with the proposed development.
- 7.9.2 The legislative and policy positions presented in this chapter highlight the need to:
- Achieve sustainable economic growth through the creation of good quality employment opportunities, thereby increasing the earning potential of every individual and redressing economic disadvantage.
  - Increase innovation and research and development activities throughout the economy by encouraging the establishment of sectoral clusters, in part to drive productivity gains.
  - Deliver modern infrastructure, including strategic employment sites and premises, and to ensure a well-connected economy to ensure Wales and the Vale of Glamorgan are attractive locations ~~to 'do businesses'~~ for businesses.
- 7.9.3 The proposed development provides an opportunity to contribute towards ~~all three of these~~ policy priorities at the national (Wales), regional (CCR), and local (Vale of Glamorgan) levels.
- 7.9.4 Existing baseline conditions indicate the Vale of Glamorgan has a very strong concentration of businesses and employment in the aerospace and defence sectors, with a relatively high concentration of these indices in the advanced manufacturing and engineering sector.
- 7.9.5 Resident-based travel to work patterns suggest the Vale of Glamorgan is part of a functional economic area characterised by heavy out-commuting to Cardiff. These conditions suggest there is a shortfall of high-order occupations and high value employment opportunities for the residents of the Vale of Glamorgan to occupy, such that residents of the area are forced to travel outside the local authority in order to find suitable employment.
- 7.9.6 The assessment of significance of effects has determined that the proposed development is likely to have a beneficial effects on economic receptors.
- 7.9.7 In terms of the construction phase, the economic impacts of the proposed development on employment, wages, and GVA are assessed to be ~~of minor significance~~ of moderate (beneficial) significance, which is significant in EIA. Consideration of the (uplifted) refreshed land use mix under both the low and high scenarios is also assessed to be of moderate (beneficial) significance, which is significant in EIA.
- 7.9.8 In terms of the operational phase, the economic impacts of the proposed development on employment, wages, and GVA are assessed to be ~~of major significance~~ of moderate (beneficial) significance, which is significant in EIA terms. Consideration of the (uplifted) refreshed land use mix under both the low and high scenarios is also assessed to be of moderate (beneficial) significance, which is significant in EIA.
- 7.9.9 On the basis of the economic impacts assessed in this chapter, there are no additional monitoring or mitigation measures required to minimise, reduce or offset the possible effects on the receiving environment i.e. the economy.
- 7.9.10 With regards to potential effects associated with the delivery of relevant cumulative projects, during the construction phase cumulative projects are anticipated to make a positive economic

contribution while ensuring sustainable and manageable delivery approaches via Resource Management Plans, with no adverse cumulative effects identified.

- 7.9.11 During the operation phase, the identified cumulative projects present the Vale of Glamorgan Council with an opportunity to maintain the required flexible approach to delivery of employment sites and premises. Furthermore, the delivery of a large quantum of high-quality floorspace suitable for high-tech, R&D, and innovation led activities is expected to attract businesses in CCR's priority sectors such as FinTech, MedTech, compound semiconductors, and green technologies. This alignment with priority sectors can further strengthen the region's economic base, supporting innovation and contributing to long-term economic resilience. No adverse cumulative effects are identified.

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