

RHONDDA CYNON TAF COUNTY BOROUGH COUNCIL

LOCAL DEVELOPMENT PLAN (2006-2021)

Employment Land Requirement Topic Paper

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1.0 INTRODUCTION

1.1 Delivering sustainable economic growth is a pre – requisite of the themes of ‘Building Sustainable Communities’ in the Wales Spatial Plan, A Better Life: the Rhondda Cynon Taf Community Plan 2004-2014, and the Council’s Economic Development Strategy : Boosting Our Local Economy.

1.2 Through the Local Development Plan process a sufficient range and choice of sites for employment development will need to be allocated to deliver a strong and diverse economy; quality, well paid jobs, and address problems of economic inactivity. This will greatly assist in developing the key aims of the above Plans as well as influencing and guiding co-ordinated, planned, and sustainable locations for employment that meets not only current market demand but fulfils sustainability requirements for the future.

1.3 This Topic Paper sets out the statistical background analysis and justification for the scale of land allocations identified in the Rhondda Cynon Taf Local Development Plan 2006-2021: Preferred Strategy document. The approach intended to achieve this is to:

- **Identify the baseline situation in 2006** regarding economic and population structure, employment available, current commuting patterns etc.
- **Examine the economic outlook** for Rhondda Cynon Taf in the context of emerging demographic and economic trends.

- **Identify the future needs** over the Plan Period for employment land within Rhondda Cynon Taf linked to anticipated population and economic growth.

2.0 POLICY CONTEXT

2.1 The Council has a statutory responsibility to ensure that sufficient employment land is available to meet identified need. Paragraph 7.1.7 of Planning Policy Wales states that local planning authorities should ensure that:

- Sufficient land suitable for development for enterprise and employment use and well served by infrastructure is designated for employment so as to meet both identified and as yet unidentified needs.
- New development for enterprise and employment uses is located and implemented in accordance with sustainability principles.

2.2 The Preferred Strategy of the Local Development Plan acknowledges this. Policy SP7 of the document states that:-

The economic development needs of Rhondda Cynon Taf will be met through the identification of some 300 hectares of land for general employment and business park use during the period 2006 – 2021. Proposals for Employment generating development which diversify the local economy and extend the range of high value, well paid employment opportunities available locally will be supported. Emphasis will be given to the promotion of mixed-use developments that promote the objectives of sustainability and environmental protection.

3.0 BASELINE SITUATION – JOB SUPPLY

Economic Structure

- 3.1 With a population of 232,000 people, Rhondda Cynon Taf is second only to Cardiff of all Wales' local authority areas in terms of population size. The economy of the area has been traditionally associated with mining and manufacturing. The decline in traditional industry throughout the developed world has, however, changed the outlook of the economy in Rhondda Cynon Taf.
- 3.2 The economic structure of the County Borough is illustrated in Table 1 where comparisons are made with Great Britain as a whole and Wales. The sector profile remains one with a greater emphasis on manufacturing and public administration than throughout Great Britain and Wales. Manufacturing currently employs just under one in every four employees in Rhondda Cynon Taf, which compares to just 11.9% of the Great Britain workforce, and 15.3% of the Welsh workforce. However, there has been a considerable decline in the proportion of manufacturing employment in Rhondda Cynon Taf – falling from 27.8% in 2000 to 23.3% in 2004. It is worth noting, though, that the decline has been against the backdrop of increasing overall employment, with the number of jobs lost being just under 2,000. Whilst this remains a significant figure, it represents a slower decline than found throughout Wales and Great Britain.

Table 1: Employment by Broad Sector (% of Total Employment)

	Great Britain		Wales		Rhondda Cynon Taf	
	2000	2004	2000	2004	2000	2004
Agriculture and fishing	1.0%	0.9%	1.2%	1.2%	0.2%	0.1%
Energy and water	0.8%	0.6%	1.0%	0.6%	1.6%	1.1%
Manufacturing	15.0%	11.9%	18.6%	15.3%	27.8%	23.3%
Construction	4.5%	4.5%	5.3%	4.6%	2.6%	3.8%
Distribution, hotels and restaurants	24.1%	24.7%	22.7%	23.8%	18.9%	20.2%
Transport and communications	6.1%	5.9%	4.2%	4.6%	3.0%	3.5%
Banking, finance and insurance, etc	19.6%	20.0%	11.4%	11.7%	7.3%	7.3%
Public administration, education & health	24.0%	26.4%	30.4%	32.8%	32.9%	35.9%
Other services	5.0%	5.1%	5.2%	5.4%	5.6%	4.7%

Source: Annual Business Inquiry /Huggins Report (2006)

3.3 The largest sector in Rhondda Cynon Taf (and also in Great Britain and Wales) is the public administration, education and health sector. Employment in this sector accounts for over a third of all employment within Rhondda Cynon Taf, and between 2000 and 2004 contributed some 4,300 jobs to the Rhondda Cynon Taf economy. Average annual growth rates of 4.2% outstripped growth rates of 3.8% and 3.2% recorded for the sector throughout Wales and Great Britain respectively.

3.4 Employment in business and financial services is still relatively low in Rhondda Cynon Taf. Just 7.3% of all employees are employed within this sector – the same proportion as in 2000. Throughout the whole of Wales, 11.7% of all employees are employed within this sector, whilst it accounts for one in five of all employees in Great Britain.

Employment Growth

3.5 Employment growth is a key element of the Rhondda Cynon Taf Economic Regeneration Strategy: Boosting Our Local Economy. The current target for employment growth in the Strategy is 1% per annum, which is greater than the levels of population growth currently experienced throughout Rhondda Cynon Taf. Annual Business Inquiry data reveals that the total number of employees in Rhondda Cynon Taf has risen from 72,545 in 2000 to 78,370 in 2004. The increases, however, has been by no means steady, with a sharp rise and fall evident between the years 2001 and 2003.

Table 2: Total Number of Employees – Rhondda Cynon Taf

	2000	2001	2002	2003	2004
All Employees	72,545	72,531	77,287	72,439	78,370
Full Time	50,200	50,710	54,237	50,802	52,168

Source: Annual Business Inquiry/Huggins Report (2006)

3.6 It is important when analysing employment growth to distinguish between full-time and part-time employment. Whilst growth in part-time employment is desirable, it is full-time employment that provides much of the wealth in a local area. Part-time employment (classified by the Annual Business Inquiry as constituting employees who work less than 30 hours per week) is often more temporary, lower-paid and lower skilled employment.

Table 3: Number of Jobs

	2000	2001	2002	2003
Great Britain	28,984,000	29,283,000	29,473,000	29,757,000
Wales	1,255,000	1,272,000	1,278,000	1,306,000
Rhondda Cynon Taf	79,000	81,000	86,000	81,000

Source: Annual Business Inquiry/Huggins Report (2006)

3.7 Growth analysis between 2000 and 2004 (or 2003 using Job Density employment data) highlights continued employment growth in Rhondda Cynon Taf that is achieving and exceeding its target rate of growth of 1% per annum. The total number of jobs has grown by 1.9% per annum between 2000 and 2004. Full-time employment growth has also been positive over the same period, despite relative stagnation of full-time employment growth throughout Great Britain as a whole.

4.0 BASELINE SITUATION - JOB DEMAND

Population Structure

4.1 Population has remained relatively stable in Rhondda Cynon Taf since the 2001 Census, whilst the population of Wales has continued to rise. Much of the growth in population within the area has occurred within the more southern and urban localities.

4.2 Since 2001, Rhondda Cynon Taf has developed a more aged population profile. The proportion of the population

aged less than 30 has fallen from 38.2% in 2001 to 37.6% in 2004. Over the same period the proportion of the population aged 60 or over has risen from 21.2% to 21.8%. These trends roughly mirror those of Wales and the United Kingdom, and the global trend in the developed world towards lower fertility rates and increasing life expectancy. The northern areas of Rhondda Cynon Taf are relatively more aged in composition than their southern counterparts. There has been a dramatic change in the migratory patterns in Rhondda Cynon Taf. Whilst there remains a net outflow of young people aged 16-24, all other age groups show a significant inflow of people in recent years. There has been a net inflow of some 2,300 people during the period 2000-2004 alone.

4.3 The 0 – 14 age band has experienced the largest change when expressed as a proportion of the total population. In 2001 19.4% of the total population in Rhondda Cynon Taf was aged between 0 and 14 years, in 2004 this figure fell to 18.7%. This equates to a fall in population within this age group of 1,800 residents. Despite this, Rhondda Cynon Taf as a whole remains relatively ‘young’ (i.e., a greater proportion of its age group falling within the lower age categories) in comparison with Wales.

4.4 Population forecasts derived from Welsh Assembly Government projections now, however, indicate that the number of households in South East Wales will increase substantially by 108,900 between 2003 to 2023. Rhondda Cynon Taf is likely to accommodate 17,627 new households during this period. A rise in the County Borough’s population which will reverse previous trends is anticipated as the Local

Development Plan will make provision for 14,850 new dwellings to be constructed up to 2021.

Unemployment

4.5 The overall unemployment rate in Rhondda Cynon Taf (as shown in Table 4 below) is slightly higher than the comparable Wales and Great Britain figures. Throughout Rhondda Cynon Taf, Wales and the United Kingdom there has been a consistent downward trend in the proportion of long-term claimants that comprise the overall claimant count rate. Between 1995 and 2005 the proportion of claimants who have been claiming for 12 months or longer in Rhondda Cynon Taf fell from 33.4% to just 8.1%. Analysis of unemployment by age band reveals little variation between Rhondda Cynon Taf and its national and local comparators. Unemployment, as in most areas of the United Kingdom is greatest for the youngest age groups.

4.6 The employment rate (as measured by the proportion of the working age population in employment) in Rhondda Cynon Taf continues to lag behind that of Great Britain and Wales. However, between 2000 and 2004 the employment rate has grown by almost 9%, outstripping that of Wales and Great Britain, with the total number of employees in Rhondda Cynon Taf rising from 72,545 in 2000 to 78,370.

Table 4: Unemployment Rate

	Mar 2001-Feb 2002	Mar 2002-Feb 2003	Mar 2003-Feb 2004	Apr 2004- Mar 2005*	CAGR** %
Great Britain	5.1	5.2	5.0	4.8	-2.0%
Wales	5.5	5.3	5.1	4.7	-5.1%
Rhondda Cynon Taf	5.9	6.4	7.1	5.7	-1.1%
Bridgend	4.9	5.0	4.0	3.4	-11.5%
Caerphilly	8.6	6.9	5.3	7.3	-5.3%

Economic Activity

4.7 Economic activity rates (as measured by the Local Area Labour Force Survey, and the subsequent Annual Population Survey) have risen steadily in Rhondda Cynon Taf since 2001. The increase in economic activity has outgrown that of Wales, and considerably outpaced that of the United Kingdom, which has experienced very little change in economic activity in the past five years. Figures still remain below these averages. One of the key Actions identified in the Economic Regeneration Strategy is to increase the proportion of economically active people to above the Welsh average.

Table 5: Economic Activity Rates

	Mar 1999- Feb 2000	Mar 2000- Feb 2001	Mar 2001- Feb 2002	Mar 2002- Feb 2003	Mar 2003- Feb 2004	Apr 2004- Mar 2005*
Great Britain	78.5	78.3	78.3	78.3	78.2	78.3
Wales	73.5	73.9	73.1	73.7	74.2	74.8
Rhondda Cynon Taf	68.6	67.5	68.0	70.5	70.5	73.2

Source: Local Area Labour Force Survey, Except *Annual Population Survey

Workforce Migration

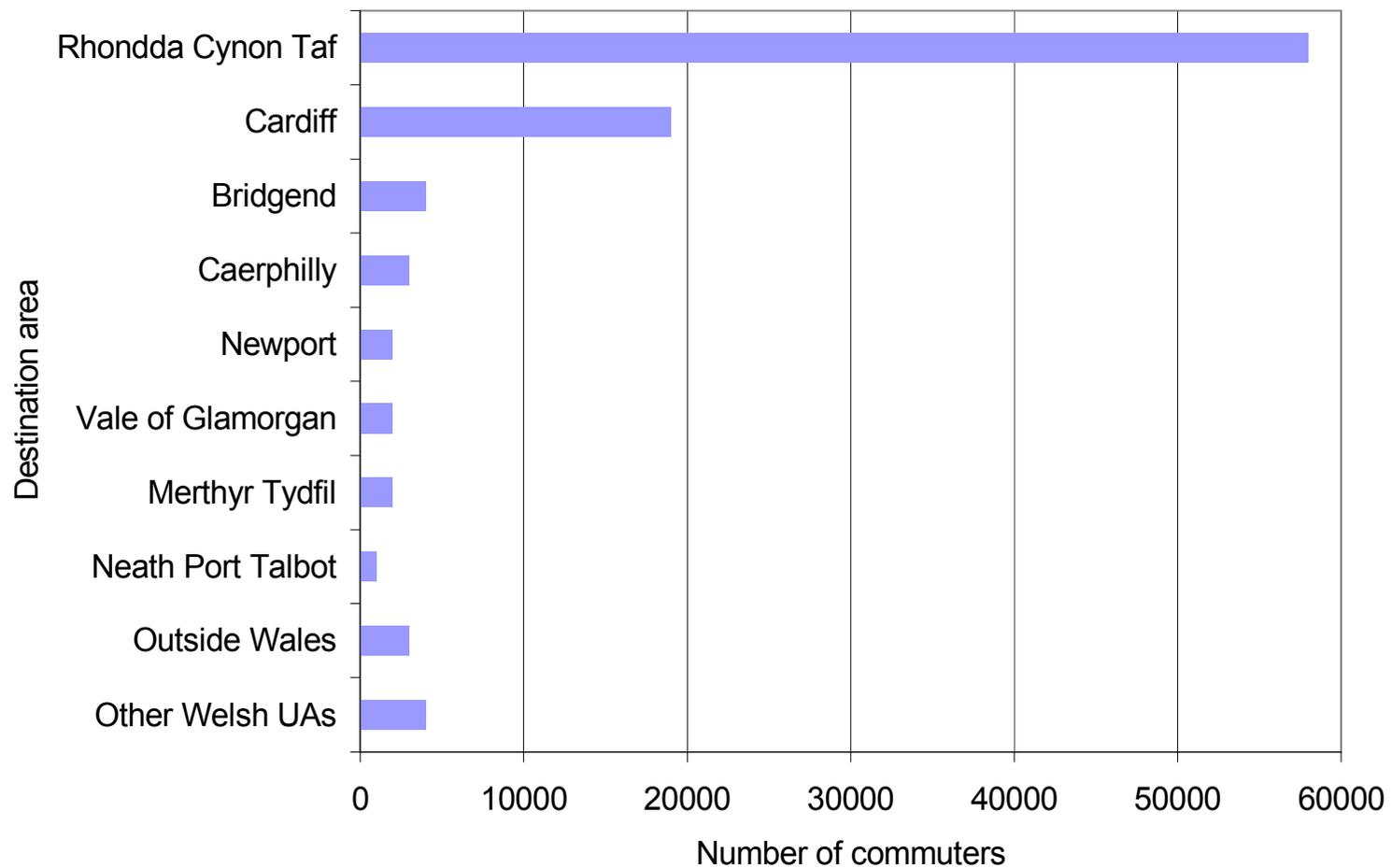
4.8 The Annual Population Survey (which superseded the Labour Force Survey in 2004) measures employment on both a residence and workplace basis. The figures for the period April 2004-March 2005 show that Rhondda Cynon Taf has a residence based employment of 95,100, compared with a workplace based employment figure of 72,407. The residence based figure is therefore over 22,000 more than the workplace based employment measure. This suggests that a large proportion of the workforce in Rhondda Cynon Taf is employed outside the local authority.

4.9 Commuting statistics for 2004 reinforce the above and indicates that a net outflow of 22,000 commuters occurred from Rhondda Cynon Taf daily – the largest net outflow of all

the local authorities in Wales. Just 60% of the local workforce is employed in the area. However, whilst there was a large outflow of some 38,000 workers daily, there was also an inflow of over 16,000 commuters.

4.10 Figure 1 below shows a breakdown of the destinations of those out-commuting from Rhondda Cynon Taf. Unsurprisingly, the largest number of commuters' destination is Cardiff, with 19,000 commuting from Rhondda Cynon Taf on average each day. Bridgend and Caerphilly account for 7,000 commuters between them.

Figure 1: – Outward commuting in Rhondda Cynon Taf



Source: Statistics on Commuting in Wales 2004, National Assembly
Statistical Directorate

4.11 Cardiff provides the largest number of in-commuters to Rhondda Cynon Taf, with 4,000 commuting daily from the capital. Bridgend provides 3,000 commuters to Rhondda Cynon Taf followed by Caerphilly (2,000), Merthyr Tydfil (2,000), Vale of Glamorgan (1,000) and Blaenau Gwent (1,000).

5.0 BASELINE SITUATION – EMPLOYMENT LAND SUPPLY 2006

Current Supply

5.1 Table 6 below provides a schedule of sites where current planning consent exists for employment development (October 2006).

Table 6 - Employment Land With Planning Status – Oct 2006

Site	Allocated Use	Status	Size (Ha)	Survey (Oct 06) Remaining Developable Area (Ha).
Ynyshir Industrial Estate	B1,B2	Consent for 4 units	0.3	0.3
Hirwaun Industrial Estate	B1, B2, B8	Existing Industrial Estate	105	4.4
Aberaman Park Industrial Estate	B1, B2, B8	Existing Industrial Estate	43.2	4.77
Canal Road/Cardiff Road, Cwmbach	B1, B2, B8	Existing Industrial Estate	8.0	1.56
Cwm Cynon	B1, B2, B8	Full Consent	14.2	1.2
Navigation Park, Abercynon	B1	Outline Consent	6.2	2.6
Land at Travellers Rest, Abercynon	B1, B8	Outline Consent	0.9	0.9
Cwm Cynon North	B1,B2	Full Consent	2.87	2.87
Sub Total				18.6

Contd.

Site	Allocated Use	Status	Size (Ha)	Survey (Oct 06) Approx. Remaining Developable Area (Ha).
Carried over				18.60
Llantrisant Business Park	B1, B2	Outline Consent	2.3	2.05
Llantrisant Business Park	B1	Full Consent	2.9	3.9
Ynysyplwm / Ely Meadow	B1, B2	Western site – Developed and part occupied Eastern Site – Outline Consent	4.9	2.9
Garth Business Park, Llanharan	B1, B2	Full consent	6.4	6.4
Coed Ely, Tonyrefail	B1, B2	Outline Consent	18.0	20
Parc Eirin, Tonyrefail	B1	Outline consent	36.1	4.0
Grand Scenic Site – Parc Eirin	B1,B2,B8	Outline	3.3	3.3
Technium Site Nantgarw,	B1	Full Consent	2.5	2.5
Llanilid Opencast Site, Brynna / Llanharry	B1	Outline Consent	65.68	65.68
Pencoed	B1	Full Consent Site under construction for Project Bluebird	33.0	33.0
TOTAL REMAINING				162.33

Previous Development Rates

- 5.2 A total of 74.4 hectares of land was developed between 2001 and 2006. This gives an annual take up rate of just under 15 hectares per annum over a 5 year period. If this trend were projected forward over the 15 year Plan Period 225 hectares of land would be required.
- 5.3 Table 6 identifies a total of 162 hectares of employment land which benefits from planning consent. If current employment land allocations in adopted Local Plans were included the figure would increase to 274.28 hectares.
- 5.4 Some of the above sites, notably the Project Bluebird scheme at Pencoed, are under currently under construction. The area being developed for this scheme alone amounts to some 15 hectares. Indeed the take up of land for B1 development in the preceding 18 month period prior to October 2006 has been high with 27 hectares completed or under construction (including the Pencoed site). The implications of such trends linked to the need to identify further employment land are discussed in the following Sections.

6.0 ECONOMIC OUTLOOK AND IMPLICATIONS

Geographical Considerations

6.1 The overall picture for Rhondda Cynon Taf is positive. Economic activity rates are rising, qualification rates are increasing, employment is rising and a number of economic development indicators, such as business density and start-up rates, show positive signs. Despite this positive news, Rhondda Cynon Taf remains a relatively poor local authority area. Low levels of economic output (as measured by relatively low levels of GVA per capita) are experienced throughout the locality, resulting from low economic activity rates, low employment rates, a low working age ratio and low levels of productivity.

6.2 Significant disparities, however, exist throughout Rhondda Cynon Taf. The Welsh Index of Multiple Deprivation illustrates these disparities – the Rhondda Valleys and pockets of the Cynon Valley have particularly high levels of deprivation. As well as high levels of deprivation, the Rhondda Valleys and the Cynon Valley possess much lower rates of economic activity than the Pontypridd constituency area (69.9%, 70.9% and 79.1% respectively).

6.3 Furthermore, between 2000 and 2004, the number of full-time jobs in the Rhondda Valleys fell by over 11%. Over the same period the number of full-time jobs in the Cynon Valley rose by over 8%, while a much greater growth of almost 19% was experienced in the Taff-Ely area. At 66.7%, the Rhondda Valley also has the lowest employment rate in Rhondda Cynon Taf, with the employment rate in Cynon

Valley is only slightly higher at a level of 67.1%. Taff-Ely's employment rate stands at 74.3%. Unemployment rates are also significantly higher in the northern parts of Rhondda Cynon Taf.

6.4 The combination of high levels of deprivation, low levels of economic activity and employment rates, coupled with negative employment growth, is a key concern for the northern areas of Rhondda Cynon Taf. The continuation of current employment trends will result in increasing disparities between the northern and southern parts of Rhondda Cynon Taf. The Preferred Strategy in the Local Development Plan recognises that policy intervention is needed to address this issue and this will have to be interpreted in land use terms. Whilst these northern areas increasingly function as commuter settlements for southern parts of RCT some residents, for example, may find it difficult to travel long distances. It is also important that employment opportunities remain visible for those detached from the labour market.

Growth Sectors

6.5 The changing nature and location of the manufacturing sector means that greater emphasis should be placed upon the development of higher-value added manufacturing sectors, where the competition from lower-cost production areas is less intense, and where the competitive advantage of Rhondda Cynon Taf are more explicit.

6.6 Policy making should also take into account the needs of the key growth sectors within Rhondda Cynon Taf. These growth sectors, i.e. Building Construction, Social Enterprise,

High Tech Manufacturing and Knowledge Based Industries, represent the growing private sector business within Rhondda Cynon Taf. These sectors, and others relating to trends such as increasing environmental awareness (for example, green manufacturing sectors) will be the basis for growth in employment and also *quality* employment within the County Borough.

6.7 Social enterprises hold a different opportunity for the Rhondda Cynon Taf. Where employment growth has been slow or negative, and where it is difficult to attract private enterprise, social enterprise development offers a new path for the development of enterprise

Employment Land Implications

6.8 There have been recent changes in the economy of Rhondda Cynon Taf that are likely to have an impact upon employment land sites. These include decreasing employment in manufacturing sectors; increasing levels of employment in construction; distribution, hotels and restaurants; transport & communications; banking, finance & insurance; etc; and public administration, education & health. Forecasts predict a continued fall in manufacturing employment and continued increase in employment in the service sector. A key issue is to ensure that the changing needs of businesses in Rhondda Cynon Taf are reflected in the supply of employment sites throughout the County Borough.

6.9 Recent studies have established that the overall supply of employment land is relatively healthy although there has

been a rapid take up of B1 land (27 hectares April 2005 to Oct 2006). The current supply does not however, meet future needs, in terms of:

- Type of employment sites and units available – specifically smaller flexible space
- Meeting the demand from micro-businesses
- The quality of office space, including town centre provision

Concerns also exist regarding the redundant nature of industrial space – the ‘large box syndrome’ of provision built during the 1980s and earlier; the perceived poor environment of some employment sites including difficult accessibility in many areas; and a mismatch of supply around the M4 area

6.10 Recommendations which were made in the Arad Employment Study (2006) and which were informed by consultation and appropriate literature reviews were as follows:

- There is a need develop a clear framework for investment intervention;
- There is a need to develop a more responsive planning policy framework that offers more flexibility, especially with regard to mixed-use developments.
- Employment sites need to be rationalised

- Investment is needed to ensure that sites are improved in terms of access and connectivity;
- There is a need for greater dialogue with the private sector to encourage better design and environmental improvements

6.11 The above considerations therefore have to be addressed in terms of achieving a supply of land which will adequately meet the changing requirements of a dynamic employment sector over a 15 year period. The employment and economic growth needs of Rhondda Cynon Taf are recognised in the Local Development Plan Strategy, which seeks the development of a business environment which delivers a strong and diverse economy; quality, well paid jobs, and addresses problems of economic inactivity.

7.0 EMPLOYMENT LAND REQUIREMENTS 2006 – 2021

7.1 The availability of employment land, especially high quality employment land, is closely linked to promoting and maintaining employment growth. The designation of additional strategic, local and small employment sites to meet market demand over the Plan Period will help the County Borough to move towards an economy based on high quality value added sectors.

7.2 In Section 5 it was established that if previous employment land development rates were projected over the Plan Period a total of 225 hectares of land would be required. Although a large proportion of this requirement could already

be accommodated on committed sites, it has already been noted that the current supply does not meet qualitative needs.

7.3 On this basis an anticipated future annual rate of employment land development of 20 hectares per annum (ie 5 hectares per annum above rates experienced over the past 5 years) would be a reasonable expectation over the 15 year Plan Period. This would result in the need for a total supply of **300 hectares** to be identified.

7.4 The factors below will contribute to the need for this additional land as they will either result in the erosion of the current supply, or will justify further allocations to address both quantitative and qualitative need and to allow for the higher take up of land anticipated. Such considerations include;-

- **Review of Current Land Bank**
- **Population Growth**
- **Reducing Out Commuting**
- **Availability and Phasing**

These are described in turn below.

Review of Current Land Bank

7.5 The LDP process requires previous Development Plan employment land allocations to be reviewed. A number of such undeveloped sites, together with redundant employment

sites, are also being promoted for alternative uses through the Candidate Site assessment process. In assessing such sites consideration will be given to the potential of land to accommodate mixed use schemes which could help retain some employment possibilities.

Population Growth

7.6 Section 4 established that population trends are likely to be reversed. This is due to a projected large scale growth in households over the Plan Period, which has emerged through Welsh Assembly Government forecasts, and the intention of Rhondda Cynon Taff to adopt a major growth strategy (See accompanying Housing Land Requirement Topic Paper). Previous employment land development rates have occurred in a climate of stable population patterns. More land should therefore be identified on this basis.

Reducing Out Commuting

7.7 Without a commensurate growth in employment opportunities current trends of out commuting (a net outflow of 22,000) will be exacerbated. Indeed even in the absence of large scale growth there is a need to address this existing pattern by appropriate measures to meet sustainability objectives aimed at reducing the need to travel. More employment land therefore needs to be identified

Availability and Phasing

7.8 To ensure that anticipated employment growth is not constrained by lack of appropriate business sites and

premises a steady stream of quality sites must be made available during the Plan period. For sites to be capable of meeting current and future market demand, sites must meet the following criteria:-

- **Suitability** – be broadly acceptable to occupiers in terms of accessible locations (in terms of both the immediate access and wider accessibility in terms of connections to the strategic road network) and on/off site environment.
- **Developability** – be capable of being developed within reasonable timescales with servicing and access issues easily resolved.
- **Scale** – to be of sufficient size to accommodate the size of unit most in demand.
- **Ownership/planning** – be available (in ownership or planning terms) now or capable of being made available through the planning process in a relatively short timescale.

7.9 Each of the above criteria must be satisfied for a site to be regarded as available and capable of meeting current occupier demand. It will therefore be necessary as part of the Local Development Plan process to give some consideration of the likely scale and phasing of development.

7.10 It is anticipated that the larger Strategic Sites identified in the LDP Preferred Strategy will accommodate an appropriate mix of employment, housing and other uses

which would be phased over a long timescale, linked to the provision of necessary infrastructure and services and market demand for the land. Examples where a significant proportion of employment land is likely to be identified include the Hirwaun/Tower Colliery sites, Mwyndy, and Llanilid. Allowance will need to be made for development on parts of these sites which may not emerge during the Plan Period. Additional land should be identified in order to compensate for this factor.

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Review of the Rhondda Cynon Taf Economic Regeneration Strategy

(Robert Huggins Associates 2006 in association with Arad Consulting)

Rhondda Cynon Taf Employment Land Study

(Arad Consulting Ltd)