

Rural Wales- Time to meet the challenge 2025

May 2017

A Strategy for the Future

This report makes the case for a renewed focus on a more coherent strategy to deliver greater prosperity in Rural Wales, an area which covers three quarters of the land mass of Wales. At the heart of the plan is a fresh emphasis on an ever more coordinated approach to economic development in the region. No community, whether post-industrial or deep rural can survive without an economic plan.

Building on existing initiatives, the time is right to revisit our policy for Rural Wales, its market towns, network of small villages and coastal communities to consider once again how the pressures of global change, and the changes that arise from leaving the EU can best be met.

We would advocate developing a clear **place-based policy** to be determined and led by the private sector, Welsh Government and local authorities following consultation with the local population to address the spectrum of challenges which confront us in Rural Wales.

Brexit poses a significant threat, but also provides the impetus for creative thinking to meet the challenges ahead. Rural Wales needs its own economic plan to match up to the success of City Region propositions in Wales.

The purpose of this document is to propose ideas to the Welsh Government by individuals and organisations who live and work in the region to establish a robust programme to prepare for a post Brexit economy. Rural Wales will insist on its share of funding for economic development from the Welsh Government, and will be careful to build on the good work which is already being done. There is a need to develop a new partnership between rural and urban Wales which recognises that they can benefit each other and a need to develop an appreciation that inter-regional connections are critical rather than just planning for urban and rural regions in isolation.

An integrated, coordinated approach is required across economic development, planning, transport and public service provision, especially for small rural towns which are often the economic hub of a much larger geographical area. Creative responses to the challenge of austerity are already being explored to prevent the closure of public and commercial services such as schools, libraries, banks and post offices in small towns and rural communities. Our mission should be to encourage **smart rural development** which aims to deliver a sustainable and inclusive economy. The rural economy must prepare for the shift towards further automation and use of Artificial Intelligence and the possible reduction in traditional roles, but encourage high tech high skilled jobs in the area. We must also take advantage of the opportunities provided by increased leisure time and tourism demand as a result of automation.

This document will set out some key recommendations, which will require the Welsh and UK Government to intervene where there is market failure to enable the delivery of basic public services and encourage investment. A minimum level of public service in rural areas should be set out so that Government can be held to account and public expectations can be managed.

The objective will be to ensure clarity, simplicity, continuity, efficacy and flexibility. It has been tested on organisations and businesses which flourish and those which struggle to survive away from urban markets.

For many years we have attempted to create “can do” communities, but inertia and conservatism have often won the day. It is easy to agree on things to oppose, but often more difficult to deliver real support for the things that can deliver real change. We know that the environment and landscapes of Rural Wales are treasured by so many people, but they must not become the graveyards of good ideas.

A shift must occur which will allow a “can do” attitude to win out, a shift which will overcome risk aversion and slow decision making, a shift which will work on the basis of a presumption in favour of development and innovation. Environmental impacts and local development plans need to be respected but adapted, where necessary, in a constructive way.

We would support the recommendations of the Marsden Report and on Future Landscapes which has suggested that National Parks should “reform their purpose to be catalysts for regional development in rural areas.” Scarce resources will require a streamlining of planning which must focus on crisp and timely decision making supported by well-resourced planning authorities.

It is essential that there is a coherent and clear delivery plan where responsibility for outcomes is fully established. Delivery should happen at as local a level as possible, and working in partnership should be encouraged. However, careful monitoring of outcomes and failure to deliver should mean that the responsibility will move up to a higher tier.

It is only through creating a vibrant economic environment are we likely to retain our young people in rural Wales, providing affordable homes and to help preserve the Welsh language which is a cornerstone of the culture of our nation.

A “made in rural Wales” economic development plan

The economic development plan should be one which is developed in Rural Wales, by Rural Wales, for Rural Wales and cannot not be a plan which is imposed on Rural Wales by Cardiff.

To that end, a group of people with a track record of delivery in rural Wales has been brought together to make some initial recommendations to the Welsh Government.

The Mid and West Wales Economic Forum is chaired by Assembly Member for Mid and West Wales **Eluned Morgan** and membership includes:

- **Susan Balsom** *Director, Cambrian Mountains CIC, Trustee Artes Mundi*
- **Melanie Doel** *Chair, Brecon Beacons National Park Authority*
- **Professor Medwin Hughes** *Vice Chancellor, University of Wales Trinity St. David*
- **John Idris Jones** *Chair, Snowdonia Enterprise Advisory Board*
- **Stan McIlvenny OBE** *Chair, Milford Haven Waterway Enterprise Zone*
- **William McNamara** *CEO, Bluestone National Park Resort, Pembrokeshire*
- **Glen Peters** *Managing Director, Western Solar Ltd*
- **Huw Thomas** *Puffin Produce Managing Director, Puffin Produce, Haverfordwest*
- **Stephen Thornton** *Public Affairs Manager, Valero Pembroke Refinery*
- **Professor Elizabeth Treasure** *Vice Chancellor, Aberystwyth University*
- **Eirwen Williams** *Director Menter a Busnes*
- **Elinor Williams** *Regulatory Affairs Manager, Ofcom Wales*

Town and Community Councils in Mid and West Wales have also been approached to ask what their priorities are for rural economic development and these have been fed into this plan.

These recommendations will be tested and developed further with local government authorities in rural Wales, with community organisations and with anyone with an interest in contributing to the debate; they will then be presented to the Welsh Government with a view to informing its new economic development strategy. There will need to be buy-in from the local communities and there will need to be a meeting between a bottom-up community-based economic strategy and a more overarching strategy from above.

Rural Wales is large and diverse. We would recommend that the Welsh Government calls a meeting of the Rural Development Forum of the WLGA to ask them to define what they would define to be “Rural Wales” as local government will be key partners in owning and enabling the rural development plan. This meeting could be extended to include other key players in rural Wales.

The Case for Change – why a plan for rural Wales?

Vision for Rural Wales

Rural Wales should prioritise building on its natural competitive in order to provide jobs with reasonable pay and ensure the wellbeing and provision of high quality services for its citizens.

Economic opportunities and high skilled training along with affordable housing must be provided if young people are to stay and have a future in Rural Wales.

Rural Wales is an area of outstanding beauty with a high proportion of people who are highly entrepreneurial.

It has an established tourism industry and boasts key Universities in Aberystwyth, Lampeter, Carmarthen and Bangor which along with Further Education establishments are key to driving up the productivity rates in the area.

It has areas of excellent fertile land and sea which produce quality food and in Milford Haven we have one of the best strategic ports in the United Kingdom.

Rural Wales provides a uniquely clean environment for business development and the opportunity to use nature as an economically important resource. This offers a clear marketing advantage for inward investment and/or relocation of modern businesses.

Rural Wales should embrace the opportunities provided by new technologies and the provision of high speed broadband across much of Rural Wales to position itself for the future.

Government has a responsibility to step in and to make up for market failure in rural areas in particular in relation to key infrastructure developments.

The Welsh Rural Economy

Low GDP figures

Wales lags behind other parts of the UK in terms of GDP, (£18,882 for Wales, £26,577 for the UK as a whole) and Rural Wales lags behind many parts of the rest of Wales (for example, Powys' GDP per capita is £16,596).

There is a need to recognise that measuring success should not be restricted to GDP figures, and we need to be mindful of the Welsh Government's Well-being of Future Generations Act which states that other factors such as the environment, equality, prosperity, health, global responsibility and cultural matters including the Welsh language need to be considered in addition to raw economic data. It is essential that economic activity is enhanced and expanded in Rural Wales whilst sustaining an environment where people can live and work comfortably.

City Regions

The Welsh Government has a plethora of economic development plans and programmes to enhance economic activity. Recently however there has been a shift towards a place-based approach to economic development with a focus on City Regions.

The rural economy is fundamentally different from the urban economy and rural areas face very different challenges, needing a specific policy of their own in order to fulfil the economic potential and future sustainability of rural communities.

Currently there is an assumption that economic development will take place in relation to four regions. The Cardiff City Region, Swansea Bay City Region, the North Wales Economic Ambition Board and the Growing Mid Wales Partnership Board. We would contend that there are regions which overlap, but that a rural approach should include the growing Mid Wales Partnership Board which is made up of Powys and Ceredigion, but that other local authorities be asked how and whether they would like to participate in a rural development plan.

Fundamentally however, there is a need for urban Wales and rural Wales to support each other.

Brexit

In the past the financing of economic development in large parts of Wales has largely been driven by EU funding channels. With the BREXIT vote there is real uncertainty regarding the future of financing economic development with the exit of the UK from the EU in 2019 (although the UK Government has promised to honour funding streams until 2020).

Rural Wales, however, faces a double whammy compared to other parts of Wales as £350 million comes into Wales from the Common Agricultural Policy. Whilst in terms of GVA the contribution of farming is relatively small (0.71% of GVA in 2015) the fact is that almost 60,000 (4.07% of regional employment) people are employed in the sector. Agricultural funding is circulated widely in the local economy and sustains other businesses. Under the bespoke model of an agreement that the Prime Minister has suggested should be developed with the EU, there is very little chance that the UK will continue to be a part of the CAP, therefore a major re-structuring of the way agriculture works must occur. Challenges in terms of reduced subsidies, increased tariffs, increased competition from outside the EU and increased paperwork demand that we re-think how we can reshape the agricultural industry in Wales to ensure that it remains sustainable. There is a need to speed up decision making and payments from the Rural Development Plan if we are to access all the money allocated to rural Wales prior to BREXIT.

As well as agriculture, Rural Wales is home to many public sector institutions and organizations that have benefitted hugely from EU programmes and funding over the past 30 years. Brexit will therefore impact greatly on their future plans, their employment potential and the significant knock-on reduction in spend in the local rural economy.

One of the great advantages of EU funding is the fact that it takes a multi-annual approach. This means that businesses and organisations can plan in the longer-term. The Welsh Government will need to come up with a way to ensure that this longer-term planning can continue and that economic development will not be stifled by annual budget rounds.

Insisting on a fair share for Rural Wales

Rural Wales faces different challenges from the rest of the country, and we must ensure that we receive our fair share of funding from the Welsh Government.

There must be a recognition that it is far more expensive to deliver the same services in rural Wales than in urban Wales. Assessments should be made as to whether Welsh Government programmes and staffing are adequate to meet the needs of rural Wales and to check to see whether Rural Wales receives its fair share from national programmes of the Welsh Government.

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Five Strategic Objectives

1

Building on the Infrastructure of rural Wales

2

Increasing rural Wales' skills and productivity

3

Growing our businesses

4

Food, Farming and Forestry

5

Using the Foundational Economy to ensure local jobs are provided for local people

6

Increasing visitor numbers, time spent in the area and amount spent

Building on the Infrastructure of rural Wales

There is a lack of equality in terms of private sector-led infrastructure developments in Rural Wales. As with other constituent parts of the United Kingdom, rural communities are at a competitive disadvantage when compared with urban centres.

In relation to Broadband the Welsh Government has recognised this and has invested heavily in the Superfast Cymru Broadband Programme, which will provide a 96% coverage in Wales by the end of 2017. This is a real achievement and a competitive advantage for Rural Wales compared to other UK areas and therefore Welsh Government needs to promote this more robustly in their inward investment activities.

The Government, both UK and in Wales needs to recognise that in terms of mobile phone coverage, the hilly and mountainous terrain of rural areas, the sparse population and current planning restrictions mean that covering Wales is more difficult than other parts of the UK. This translates as Wales needing 63 masts per million of the population compared with 11 masts in England. Similar restrictions inhibit water and sewerage infrastructure.

In terms of transport, rural Wales has very little dual carriageway or motorway infrastructure. It is largely linked through a network of Trunk Roads and category A routes serviced by local authorities. Public transport is heavily subsidised and provided mostly by buses, which often operate below capacity.

Rural Wales has three main ports (Milford Haven, Pembroke Port and Fishguard Harbour) the Welsh Government must have a strategy to protect these ports in the face of the BREXIT threat. We also have popular rail lines linking west to east and some coastal northern towns.

We would recommend –

- Incentivising an infrastructure for electric vehicles to recharge across Rural Wales and be pro-active in encouraging businesses and local government to take the UK lead in rural areas to pilot the use of driverless electric vehicles (EVs), which will eventually provide cheaper, more flexible public transport in Rural Wales.
- Encouraging the Welsh Government and UK Government to put pressure on the companies responsible for maintaining the National Grid to reinforce the network in areas where the grid is weakest and economic development opportunities greatest, especially where there is potential to harness renewable energy production and the use of EVs.
- Easing the requirements for planning to allow higher mobile masts to enable more phone coverage and to encourage mobile providers to share masts.
- Pressuring the UK Government for mobile phone masts to become a universal public service obligation.

Increasing Rural Wales' skills and productivity

Education, vocational training and lifelong learning are central pillars of employability and sustainable enterprise development. Skills growth is key to stimulating sustainable development processes and is essential to addressing the opportunities and challenges to meet the demands of changing economies and new technologies.

Productivity rates in rural Wales depend ultimately on the number of people in employment and how productive they are at work. According to the Office of National Statistics, productivity levels in all sub-regions in Wales were below the average for the UK. The lowest performance was the rural sub-region of Powys, with a level 35% below the UK average.

We would recommend –

- Sustaining a focus on increasing the standards in rural schools, which are extremely divergent and a recognition of the need for a support mechanism to meet specific rural challenges
- Encouraging closer collaboration between industry and local further and higher education to ensure the skills being taught are those that are required.
- That HE and FE colleges work with local businesses to offer more place-based learning opportunities
- Facilitating technology education in the farming sector to take advantage of the advances being made in areas such as precision agriculture
- As the Welsh Government redirects the focus of Communities First, focusing on the successes that can enhance skills and apprenticeships for people not just on place. Government agencies should identify economically inactive individuals in the poorest areas to receive individually tailored value explicit training vouchers
- Promoting outreach from sectors such as food preparation, tourism, hospitality to local schools, so that real-life experiences and application of skills can be seen with a hands-on approach
- Recognising that providing courses such as plumbing and electrical engineering are more expensive to provide in rural Wales and ensure that this is accounted for when allocating Further Education resources
- The Welsh Government explore whether there is merit in adopting a “Scotland Rural College” web portal approach to ensure a single promotional focus for all relevant rural courses and qualifications

Growing our Businesses

Whilst there are a host of potential industries and businesses that could benefit from a robust economic development programme for Rural Wales, it makes sense to focus on sectors where we already have a competitive advantage and where there is more potential for growth or where local businesses can help to deliver essential local services. It should also be recognised that the environment is a key asset which can be used to deliver economic value.

We would recommend –

- Providing tailored support for indigenous businesses using technology to deliver modular, convenient and interactive training to businesses who want to establish themselves in Rural Wales and to give support to those already here to grow. This training should focus in particular on the need to add value to local resources
- The Welsh Government develop easier access to funding at preferential rates for business in particular for longer term loans through the Development Bank for Wales
- Welsh Government and Local Authorities should develop rural enterprise zones based around key hubs, ideally using facilities which already exist like local pubs and schools which are struggling to survive
- Where appropriate, economic hubs should be based on specific local assets and build on work in particular in the Enterprise Zones. Companies like Puffin Potatoes can provide an anchor for the wider rural economy
- Welsh Government and Local Government must explore how successful rural development agencies such as Planed, Cadwyn Clwyd and Menter Mon can be supported in future, perhaps with the WCVA
- In addition to this, the shift towards self-employment should be encouraged and supported in and around villages in rural Wales with consideration for appropriate housing and “social centres” to be given in future Local Development Plans. These “social centres” will be places where individual business owners can gather to exchange ideas
- Reforming planning guidance and culture and adapting Local Development plans. Being flexible where appropriate on building control, licensing, procurement and trading standards with a view to ensuring that investors understand that Rural Wales is “open for business”. Ensuring that planning departments are well resourced

- Require all Local Planning Authorities to offer pre-application advice and encourage businesses to take up this service to deliver a shared aim of achieving appropriate development that meets the needs for sustainable economic development for both current and future generations
- The Welsh Government revise its TAN note on planning to reflect the presumption of consent for development which enhances employment and economic activity but still respects environmental and other government requirement considerations. The roll out of an information delivery course aimed at all rural planning authorities (NRW, National Parks, Local authorities) – should be pursued in line with the new TAN note
- The construction industry must recognise Welsh Government’s commitments to increasing the supply of affordable home and ensure that commitments for the provision of affordable homes under LPA planning obligation policies are built into their business plans from the outset and then adhered to

Food, Farming and Forestry

- Focusing on farming and food and using public procurement to enhance and encourage processing opportunities in the region, appointing a highly paid food champion to drive through the need to build from public procurement to ensuring that cooperatives etc are established and brought together to be able to provide assurances of quality and quantity to the public sector and supermarkets and ensure that the infrastructure for further processing is developed
- Using organisations such as Menter a Busnes and Farming Connect to promote innovation – in particular in the food arena. Universities should ensure they focus not just on research but on innovation and commercialisation in particular in the food, plant and biosciences arena.
- A strategy to add more value to dairy produce in a specific geographical hub, in line with the recommendations of the Welsh Dairy Review
- Supporting the delivery of 'Toward Sustainable Growth: An Action Plan for the Food and Drink Industry in Wales 2014 – 2020' and ensure that value is added to the agricultural products generated in Wales. This should be built around developing closer links with the major retailers, to ensure sustainable supply chains are constructed that benefit Welsh farmers, Welsh processors and the supermarkets themselves
- Explore the advantages and limitations of investing in chilling/ freezing facilities to allow more flexibility in the meat industry and to allow export beyond the EU
- Taking advantage of the huge opportunities in forestry, both as a raw product and as a material where we can add value locally
- A strategic focus on upland Wales with an integrated strategy of food, tourism, energy and eco system services (carbon and water management) in a post BREXIT world
- That the Welsh Government develop and action a Welsh "game meat" strategy

Using the Foundational Economy to ensure local jobs are provided for local people

Whilst Wales has lost a great deal of its manufacturing base, the foundational economy (which amounts to around 40% of economic activity) is based on the essential goods and services we all need in everyday life and so the demand does not change significantly when price and incomes change.

Essentially, there will always be a need for utilities, food, health, education, welfare and infrastructure. Similarly, this economy is largely local.

The combination of these factors means that the foundational economy is far more resilient to the whims of the marketplace and various economic problems.

We would recommend –

- Providing support to keep supply chains as short and localised as possible to keep the economic benefits within the community (e.g. building on the Cardigan community model)
- Working with the private sector to eliminate barriers to build affordable homes in rural areas in order to allow first-time buyers the chance to stay within the local community
- Prioritising the building of Eco care homes for older people, which use Welsh materials including Welsh wood. Provide extra care facilities and care hubs in rural areas, preferably with community housing organisations taking a lead role
- Encouraging community models for social care using the social capital assets that already exist in Rural Wales
- Enabling more and more rural businesses to create their own Green energy, with emphasis on wind-power, biofuel production, anaerobic digestion and other processes which are becoming increasingly viable on a small scale, encourage the use of off grid energy

Increasing visitor numbers, time spent in the area and amount spent

Tourism and leisure are integral to the Welsh economy and even more important to rural Wales. According to Visit Wales, Tourists spend around £14 million a day whilst in the country, amounting to around £5.1 billion a year.

In recent years the Welsh Government has done much to boost the tourism industry but we feel that more could be done to benefit rural Wales which, after all, is richly blessed historically, geographically and culturally.

We would recommend –

- Creating a sea-side town redevelopment strategy
- Developing a marketing strategy to link established coastal destinations on the West coast
- Natural Resources Wales to identify forestry land in North Powys to create a woodland leisure activity resort and produce and produce a prospectus inviting creative bids for delivery by the private sector
- Encouraging destination (place-based) marketing organisations to focus on extending the tourism season in order to provide sustainability within the rural economy
- Using the Welsh language and culture as a differentiating positive factor in relation to tourism
- Ensuring that a strategy is put in place to deliver a skilled workforce for the tourism industry
- Creating a Tourism training centre of Excellence in and for Rural Wales
- Ensure that the Welsh Government develop a wider rural tourism strategy beyond Pembrokeshire, Snowdonia and Brecon Beacons, including promoting off-peak and winter activities and events
- Exploring the possibility of providing WG tax breaks to encourage horse breeding and racing around Ffos Las

Pilot Projects – Hitting the ground running

Over the course of our meetings, the Mid and West Wales Economic Forum has discussed several possible pilot projects that are aimed specifically at Rural Wales and could serve as the impetus behind a new surge in development across the area. Below we have set out some pilot projects which could be delivered by 2020. These are by no means exhaustive and in fact the Forum would advocate a wider call for ideas and projects as part of a new approach to economic development in Rural Wales.

Eco Homes for older People

The lack of appropriate homes and facilities in many parts of rural Wales, together with the increasing demographic challenge of our ageing population has created significant pressure on local government and health services to care for older people.

The private sector is reluctant to invest in care in rural settings and those that do are often not local. Local authorities could take a pro-active role in identifying and auctioning new available land for such projects.

We would suggest that each local authority following consultation with a local community commits initially to building or supporting the building by Housing Associations of a group of up to 12 eco-homes which are built specifically with older people in mind, where step-up and step-down beds from hospitals can be accommodated and where a carer can be on hand to help out. The Welsh Government should help to facilitate low cost public borrowing for such a purpose. The Eco-homes should be used as a method of ensuring that short local supply chains using local products such as wood and using apprenticeships can be established. If these are successful, the Welsh Government should ensure that rural Wales receives its share of the 20,000 new homes promised, which would amount to around 5,000 homes.

Eco/Passive homes, once built, are very economic to heat and run; this would alleviate fuel poverty and contribute to climate change emission targets.

These homes should be built, as far as possible, using local materials (in particular wood), local supplies and a locally skilled workforce; preferably providing apprenticeship opportunities.

Local community care providers

Alongside the development of the Eco homes for older people we would recommend that Housing Associations, Cooperatives or Community groups are given support by Local Authorities to establish local community care provision rather than outsource this to distant companies who do not have the same understanding of the community in which they are serving. This could be based on the Solva Care model of volunteering and similar hospice care (e.g. Paul Sartori Foundation in Pembrokeshire), but needs to be enhanced from the social care budget of local authorities. One such model should be established in one community per local rural authority prior to 2020.

Using Public Procurement to drive the development of Wales as the world capital of quality Shepherd's Pie!

Welsh Lamb has long been seen as a valuable product but does not easily compete with lamb from New Zealand, which is imported at much lower prices. Furthermore, if Wales loses its current access to the EU market, we will have to pay an effective tariff rate of 46% which could make Welsh lamb uncompetitive.

We must add value locally to what is already an excellent brand by processing the original product. Over 79 million ready meals are eaten every week by adults in the UK. We must target this market and provide an initial guaranteed demand through using Welsh public procurement. The Welsh Government should also engage directly with supermarkets to help guide investment decisions and where possible build mutually beneficial partnerships.

We should encourage a partnership with an existing ready meal business or business start-up, alongside an established distributor, to ensure a shepherd's pie made of 100% Welsh ingredients is utilised by all the public procurement channels throughout Wales. This would provide a domestic market for quality Welsh lamb which may be under severe threat post BREXIT in terms of export opportunities.

Electric Vehicles pool for rural Wales

Every local authority in rural Wales should be required to provide individually or in partnership with the private sector at least 10 EV recharging posts including ones for TESLA vehicles by the end of 2018. This would encourage those first movers and generally high net worth individuals with EV cars to visit the area.

Local authorities in Rural Wales should build a car-sharing rural development app.

Looking ahead, the Welsh Government and Local Government should try and build a partnership with a driverless EV company to offer Wales as a pilot trial area.

A Rural Wales Portal

The Welsh Government already delivers a host of programmes to grow the economy in rural Wales, but it is difficult for citizens in rural Wales to find out about this information.

The Forum advocates creation of a single ('place-based!') Rural Wales Development portal as a point of entry and which will direct users to the relevant advice section.

The Welsh Government in coordination with local government in rural Wales must develop a Rural Wales Website where information in particular for business development can be easily accessed in one place.

Hydroponics

There are now significant pockets of energy being produced in rural Wales (e.g. Pembrokeshire's solar farms, windfarms and small scale hydro schemes, in addition to excess heat from large enterprises such as VALERO).

Instead of simply supplying the grid or wasting this heat, these sources of energy could be deployed locally which could help create employment and address food security issues.

Specifically, we would suggest a pilot scheme to produce all-year-round salad and vegetable crops using hydroponics in heated greenhouses and poly-tunnels. Plants are grown without soil, using mineral nutrient solutions in a water solvent.

This is a vast industry and could revive traditional areas of horticulture in rural Wales such as Pembrokeshire and the Llyn Peninsula where the climate is more favourable and could add value to supply chains linked to current successes such as Puffin Potatoes.

Processing plants to add value to fish and game meat

Wales is surrounded by over 750 miles of coast and whilst fishing has declined it is still an industry that sees much of its catch transported to England for wholesaling and processing as there are no locally developed supply chains.

Meanwhile vast amounts of game meat (especially pheasant) are produced in rural Wales. Commercial shoots bring in big spending tourists during the winter months thereby sustaining many hotels, remote village pubs and restaurants as well as employing gamekeepers, land management and other farm workers. One Mid Wales business turns over £15 million and employs 75 FTE and 75 PTE seasonal workers.

There is glut of pheasants during the season but no game dealers of scale in Wales and no processor to receive the birds.

WG should incentivise new processing plants to add value to fish and game meat.

Delivery

A clear determination of who is responsible for what

The Welsh Government along with Local Government must develop an action plan in concert with the private sector and the third sector to determine who is responsible for delivering what in relation to this document and understand that shared ownership leads to a lack of accountability and poor delivery outcomes.

Welsh Government needs to understand the severe constraints and lack of capacity of Local Government to deliver economic development. Instead they should be seen as **enablers**, accelerating development and looking at ways to improve their activities to this end.

Welsh Government should undertake a review of the resources allocated specifically to rural Wales within its economic development department and ensure that Welsh Government officials who are responsible for economic development in rural Wales are based in rural Wales and are ideally co-located with other economic development actors in the region. The WG should undertake a review of the successes of the DBRW and learn from them.

Post Brexit, the Welsh Government will look to reduce civil servant numbers. Some 400 are currently engaged in delivering EU agri-subsidy schemes. It is important that any overall reduction should not fall disproportionately on sub-regionally based offices in rural areas and that a more strategic approach should be taken to repurpose staff for economic development.

Anchor companies taking a lead role

Anchor companies active in rural Wales need to be asked to take a key role in providing private sector leadership in helping to coordinate the delivery of an economic development plan for rural Wales. E.g. Welsh Water, BT and Scottish Power

A bid to the UK Government for support

A private sector driven bid to the UK Government supported by the Welsh Government and Local Government should be developed to help fund initiatives in this programme. The experience of the successful City Region Bids in Wales should be used to develop the application.

An independent paid rural champion

The role of the Rural Champion would be to oversee delivery of the strategic plan for economic development and stand up for the people in rural communities who may not have seen the benefits that urban centres have.

The Rural Champion will be responsible for rural-proofing policy and ensuring rural Wales is considered in Government programmes.

He/she would act in partnership with local government and the third and private sectors, providing a much-needed catalyst.

A rural champion could drive forward new approaches, could encourage growth in the rural economy, could help businesses to modernise, could bring together communities, could inspire entrepreneurship.

The rural champion would make the link between the rural areas and the urban areas as well as facilitating joint working and understanding with Border counties and English conurbations.

Measuring success

Although it is important to drive up productivity rates and increase GDP in parts of rural Wales, it is essential that this is not the only mechanism which is used to measure success.

The Wellbeing of Future Generations Wales Act provides a host of National indicators against which we should measure success. These should be quantified and converted, where possible, into a financial value which will rebalance the economic viability, justification and success of Government intervention. These are measures which are likely to be more meaningful to the population than straight GDP figures.