Revised Carmarthenshire Local Development Plan
2018 – 2033

Covid – 19 Assessment

(November 2020)

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Revised Carmarthenshire Local Development Plan

Covid–19: Assessment of the Evidence Base, Strategy and Policies

1. Background

1.1 In late January 2020 the Corona Virus outbreak was declared a public health emergency of international concern (PHEIC) with its subsequent impact spreading across the world's societies and throughout our communities.

1.2 In response to the escalating pandemic on the 18th March 2020 Carmarthenshire County Council took the decision to suspend most democratic meetings, followed on the 19th March by the decision to close the Authority's administrative buildings.

1.3 On the 23rd March 2020 the UK Government introduced a full "lockdown" to halt the spread of the virus. The subsequent months has witnessed not only the tragic loss of life but also impacts to how our people, businesses, organisations, and communities behave and interact at an economic, social, and cultural level.

1.4 On the 7th July 2020 the Minister for Housing and Local Government in her letter to Local Authority Leaders and Chief Executives. In this letter the Minister reiterated the role of up to date agile development plans as the cornerstone of the planning system. In this regard the letter requires local planning authorities to reflect on the impact of the pandemic on their areas and consider the consequences for LDPs under review or being implemented. Those LDPs currently undergoing review, which had not yet been submitted to the Planning Inspectorate for examination, should undertake an assessment of the evidence base, strategy, and policies in terms of sensitivity to the consequences of the pandemic.

1.5 It should be noted that at the time of writing the Revised Carmarthenshire LDP was one of those LDP's undergoing review and pending submission for examination.

1.6 The assessment should be submitted to the Welsh Government with requests to extend Delivery Agreements (DA).

Building Better Places, The Planning System Delivering Resilient and Brighter Futures, Placemaking and Covid-19

1.7 Following the ministers letter the Welsh Government published Building Better Places, The Planning System Delivering Resilient and Brighter Futures, Placemaking and Covid-19 recovery (July 2020). The document sets out the Welsh Government's planning policy priorities that will assist in taking action in the recovery period after the Covid-19 pandemic crisis.

1.8 This document identifies development plans has having a central role in responding to Covid-19 in planning effectively for future crises and to take a long-term view to improve health and wellbeing for all. In so doing it restated the importance of having an up to date LDPs to give local effect to local development priorities and national planning policy.

1.9 The WG identify that in the immediate post Covid-19 phase there will be particular areas of policy which should be the focus of consideration and action, in order to act as a catalyst for a recovery across the pillars of sustainable development. These considerations fall in to one of three categories:

1. How we experienced the direct impacts of the Covid-19 lockdown period and the permanent positive changes we need to see in places and as part of new development.
2. The lessons we have learned over this time and how we can help to make places more resilient and adaptable to future pandemics, should they happen again.
3. Aiding the recovery after the pandemic has passed and restrictions are eased to ensure it benefits all parts of society and helps us to decarbonise, tackle climate change, reverse biodiversity decline and improve health and general well-being.

1.10 Within the document 8 key issues are identified which bring individual policy areas together to ensure that action is the most effective. The 8 issues are:

- Staying local: creating neighbourhoods
- Active travel: exercise and rediscovered transport methods
- Revitalising our town centres
- Digital places – the lockdown lifeline
- Changing working practices: our future need for employment land
- Reawakening Wales' tourism and cultural sectors
- Green infrastructure, health and well-being and ecological resilience
- Improving air quality and soundscapes for better health and well-being

Purpose of this Paper

1.11 This paper sets out assessment of the implications arising from Covid-19 on the Revised Carmarthenshire Local Development Plan, its evidence base, policies, and Strategy. It identifies which areas of the LDPs evidence base might require updating or where new research is necessary. It also sets out those areas where policy changes are likely as a response to the impacts of the pandemic and summarises the potential effects on the overall LDP strategy.

1.12 This paper should be read in conjunction with the Authority's Revised Delivery Agreement (2020) and its amended timetable and community involvement scheme for the preparation of the Revised Carmarthenshire LDP.

Plan Making Stage

1.13 The County Council published its Deposit Revised LDP 2018 - 2033 and supporting documents (Habitat Regulations Assessment and Sustainability Appraisal) along with two draft Supplementary Planning Guidance (SPG) for statutory 6-week public consultation commencing on the 29th January 2020. This period was subsequently extended by a further 2 weeks with the consultation closing on the 27th March 2020.

1.14 Whilst the initial 6 week statutory period was unaffected by Covid-19 and the subsequent lockdown, the final two weeks (which formed the extended period of the consultation from 6 to 8 weeks) were impacted by the gradual move into lockdown with the closure of Councils administrative buildings (including public libraries and customer service centres).

1.15 It should be noted that all planned public engagement events and drop-in sessions had been completed. Consequently, there was no cancellation of events or disruption to planned engagement. However, access to documents at public buildings during that last 2 weeks was limited albeit access remained available through an extensive on-line resource.

1.16 As a result of the disruption experienced over the final days of the original consultation, the Council has undertaken a further 3-week consultation on the Deposit Revised LDP and its supporting documents (SA and HRA). This consultation opened on the 11th September and closes at 4:30 on the 2nd October 2020.

1.17 This consultation includes appointment base access to the Councils customer service Hwbs and the identified open public libraries, as well as mobile libraries. The availability of documents at these locations accords with the Council's process for re-opening public buildings as part of a responsible phased approach. This provides a reasonable response to the need to make documents available whilst recognising the overriding need to reflect Government advice, reflect social distancing requirements and protect public health and that of Council's employees.

1.18 The consultation on the Deposit LDP resulted in a significant level of interest and number of representations received. Invariably therefore, and as a response to emerging evidence (including that arising from Covid-19) we will be proposing changes to the Plan. Consequently, Focused Changes will be consulted upon. This stage has been included into the timetable set out within the Revised LDP along with a revised date for the submission to the Welsh Government.

2. IMPACT OF COVID-19

Economic Impact

2.1 The impacts of Covid-19 are not evenly distributed across the economy. Those sectors most notably impacted have been food/accommodation, non-mail order retail and arts/leisure sectors. In other sectors such as construction and manufacturing whilst impacts on workplace arrangements have an impact, the greater impact comes from the initial collapse in demand and it is restoring both demand and supply chains that is central to determining reopening. Those sectors that are least affected, in addition to critical sectors that have had to stay open, are those sectors where working from home is possible and demand is much less immediately impacted by lockdown such as the public sector and utilities.

2.2 At a UK level almost a quarter of workers have stopped working since the crisis started, the majority of which have been furloughed rather than lost their jobs. With the furloughing scheme coming to an end at the end of October there is great uncertainty around future employment rates and economic recovery. This uncertainty translates from the national to the County level.

2.3 To gain an informed understanding of the position in Carmarthenshire, an initial sweep of evidence has been gathered on the impact on businesses, unemployment and our rural / primary towns. Evidence has also been sought from developers and investors who have been active in Carmarthenshire to assess whether they are likely to continue to conduct business in the County in the future. The findings are set out below:

Business / Economy

2.4 A survey of businesses across the county has been undertaken to identify, going forward the assistance they most needed. A total of 574 businesses from across the county responded to the survey. The main findings and conclusions of the report are summarised below:

a) The negative effects of the COVID-19 pandemic have been significant and wide reaching for Carmarthenshire's businesses. A wide-ranging spectrum of business types and corresponding industries have been negatively impacted by the pandemic. These effects mainly relate to a significant reduction in income, reduced access to customers, problems with supply chains and the possible cessation of trading.

b) Many of the businesses worst affected are within those sectors deemed of significant importance to Carmarthenshire in terms of employment and/or GVA. The visitor economy and food and beverage sectors alone are worth almost £169 million to Carmarthenshire's economy and are therefore sectors of great pertinence to the county. We have also heard first-hand through the survey the challenges being experienced by the Agricultural sector. With a location quotient of 5.64 (showing substantial strength) and a GVA of almost £63 million, adequate support should be offered to support this vitally important sector.

c) Many businesses (mainly those that are self-employed or freelance), have been unable to access any financial support. Analysis has shown that many businesses have faced barriers in accessing support, having been deemed ineligible for the current offer. It could be argued that should any further financial support mechanisms be developed then these businesses should be the first to benefit, especially if any of these businesses align to those sectors deemed high value.

d) Most businesses will not be able to operate longer than three months if the current situation continues. Support developed to date has been done quickly and with depleted resources in many instances.

e) The most sought-after type of support both in the short and longer term is financial in the form of grants, loans or payment deferrals/holidays. These findings present a challenge given that it is currently difficult to ascertain how much longer restrictions will be in place.

f) Some businesses would find promotion and advertising support from the Council beneficial. Businesses primarily operating within the Tourism, Leisure and Hospitality sectors indicated that they would find free advertising and promotion beneficial to their recovery.

g) There are areas of deprivation in the county where the effects of the pandemic could be felt more acutely.

h) Some businesses foresee that they will experience skills challenges as a result of the pandemic, with the majority stating that these skills deficits will relate to digital and IT skills.

i) The skills landscape will undoubtedly suffer as a result of the pandemic. The majority of job losses are likely to be at a lower skills level as these jobs tend to be part-time, low paid and more unstable.

Unemployment in Carmarthenshire

2.5 An analysis of the number of people claiming unemployment-related benefits in Wales shows that between March and April (first full month of lockdown) there were 104,869 claimants compared with 58,576 in March. This resulted in the claimant rate increasing from 3.9% to 6.8% which compares negatively with the UK average which sits at 5.8%.

2.6 The table below provides a breakdown of claimant levels in April 2020 compared with the same time last year. The trends are undeniable and are a stark indicator of the effects of the pandemic. Figures highlighted in the preceding paragraph allows confident deduction that the substantial increases seen in Carmarthenshire are primarily as a result of the pandemic.

Area	Level		Rate	
	Apr 2019	Apr 2020	Apr 2019	Apr 2020
Carmarthenshire	2,420	5,495	2.2	5.0
Wales	53,770	104,305	2.8	5.4
UK	1,106,610	2,117,360	2.7	5.1

2.7 Carmarthenshire's claimant rate appears to compare positively with the averages for Wales and the UK. However, further analysis indicates that Carmarthenshire has seen the greatest increase (2.8) in the claimant rate compared with increases of 2.6 and 2.4 for Wales and the UK respectively. The count of claimants has increased by 127% in Carmarthenshire which is substantially higher than the proportional increases seen at a Wales and UK level, (94% and 91% respectively).

2.8 There are several factors which could be attributable to these trends. Carmarthenshire's economy is characterised by a higher than average proportion of self-employed individuals (12.4% compared with 9.6% in Wales). Anecdotal evidence suggests that at a national level the package of support has been lesser and more difficult to access (owing to eligibility and timeliness) for these individuals and many have been forced to claim unemployment-related benefits. It is feasible that many of these additional claimants are therefore those that have been unable to access any other form of financial support.

2.9 Those sectors that have suffered 'shutdowns' as a result of the pandemic offer employment to approximately 25,000 people in Carmarthenshire (accounting for 37% of the total workforce). It is realistic therefore to suggest that whilst a proportion of those have been furloughed (with model-based estimates suggesting that 7,500 individuals are benefitting from the furlough scheme in Carmarthenshire) the shortfall of 17,500 people are likely to be those individuals accessing these benefits. The suggestion is that these figures are likely to rise significantly over the coming months.

Rural Towns

2.10 Prior to the current crisis we were working with consultants to develop plans to revitalise 10 of our rural towns – Llandovery, **St Clears, Whitland, Newcastle Emlyn, Laugharne**, Cwmamman, Llanybydder, Kidwelly, Llandeilo and Cross Hands - under the Council's moving Rural Carmarthenshire Forward Strategy. These growth plans were to look forward 10 years with new ideas and priorities agreed in partnership with businesses. The need for these plans has been brought into focus by the economic challenges brought about by the pandemic. The anticipated economic impacts of Coronavirus on 5 of the 10 Towns (shown in bold). The initial key findings for these 5 towns include:

- Across the five towns, 35% of the workforce (2,330 people) are employed in occupations considered at most risk (administrative, leisure, customer service, elementary).
- If one in five (466) of the most at-risk workforce lost their jobs, unemployment would increase by 70%.
- Whitland (26%) and St Clears (27%) have the highest levels of managers and professionals which offer more capacity to work from home and are considered to be less risk occupations.

- 20% of employees across the five towns are in self-employment and are considered more vulnerable to abrupt and, in some cases, total loss of income.
- Over 40% of businesses in the five towns are in shut down sectors (restaurants, pubs, café, non-food retail etc).
- 50 food and drink businesses and 100 accommodation providers are likely to have closed across the five towns, with Laugharne suffering more significantly than others.
- Impacts on agriculture are likely to have a greater impact on the five towns because there are a higher proportion of people employed in agriculture.

2.11 A review of the Covid-19 impact on the remaining 5 towns is currently being progressed with further information available shortly.

Town Centres

2.12 Currently, the economic effects of the Covid-19 crisis are highly uncertain which makes it difficult to draw a clear picture of immediate impact on our primary town centres, namely Carmarthen, Ammanford and Llanelli. The retail sector is vulnerable with shop closures and changes in consumer patterns and demand. Intervention and clear direction from all stakeholders will be required to prioritise key strategies of support to ensure town centre recovery following the Covid-19 crisis.

2.13 Potential town centre issues include:

- Improve access/ social distancing measures to be implemented within town centres, including connections between out of town sites and the town's public transport link.
- Increasing footfall to all areas of the town.
- Reducing the number of empty premises in the town centre.
- Provide alternative trading for those businesses based within core town centres (i.e. deliveries, online sales).
- Public transport issues – avoiding congestion.
- Derelict sites / empty buildings.
- Consider community enterprise and third sector role in recovery of the town.
- Provide Business Support – chamber of trade, self-help initiatives such as town centre partnerships.
- Need for effective town branding and development of a marketing & tourism
- development strategy.
- Need for financial support for new and existing businesses. Strengthen Local procurement / Local supply chain.

2.14 The Centre for Towns, an independent organisation dedicated to providing research and analysis on a range of issues affecting our towns, has recently reviewed the effect of the COVID-19 pandemic on towns and cities throughout the UK. The report findings identify Llanelli as being in the top 20 towns in the UK for absolute deprivation and therefore lacking in resilience with regards to COVID-19.

2.15 It is crucial that we help as many of our town centre businesses back operating safely as soon as possible. To achieve this, we need to create safe town centre environments and enable sensible movement throughout that will give users, residents and businesses confidence to resume activity and business.

Developer / Investor Confidence
2.16 Some 15 local, regional and national developers have been contacted in respect of their businesses and how they have been impacted by Covid 19. The discussion with developers revolved around 4 main themes (a summary of feedback is set out in Appendix 1):

- Short term impacts (current and in the next 6 months)
- Key constraints anticipated moving forward
- Key opportunities moving forward
- Key public and private sector interventions required

Environmental Impacts
2.17 Covid –19 has resulted in positive impacts on the environment particularly during the period of lockdown, notably around carbon emissions.

2.18 Access to green space has become a more factor to people and communities as has the environmental context within which they live with the role of placemaking and green infrastructure becoming an increasingly prominent consideration. Reference is however made to the impact the pandemic has had on those from socially deprived areas.

3. Evidence Base - Covid-19 Implications

3.1 The following reflect the key areas of the authority's evidence base where the impacts of Covid-19 (in whole or in part) require a further reassessment or updating.

Employment and the Economy
3.2 A review of the current evidence base will be required in respect future economic activity arising from the outbreak and how this will impact on different sectors. This will include projected impacts from Covid. It is clear however, that there can be no clear certainty in measuring and understanding the impact from the Pandemic. In this respect, there is little data or information available to inform or establish a robust trend or indeed to predict the extent and length of the economic downturn. Reference is however made to the above which will feed into and inform the Councils Recovery Plan and the economic evidence underpinning the Plan.

3.3 The role of the tourism sector in the local economy is recognised. An understanding is needed of any changes in employment patterns and demands on the sector arising from the outbreak.

3.4 In developing this broader understanding of any impacts, regard will be had to the Council's Recovery Plan and any other national and regional interventions/strategies.

Retail and Town Centres

3.5 There is a need to understand and reflect that High Streets and retail activity continue to change. Whilst the effects of Covid-19 are still largely unknown, evidence will be required to look at the changing shape of the retail sector and the resultant impact on our town centres.

3.6 Regard will be had to 'Building Better Places, The Planning System Delivering Resilient and Brighter Futures, Placemaking and Covid-19 recovery' (July 2020).

3.7 In developing this broader understanding of any impacts, regard will be had to the Council's Recovery Plan and any other national and regional interventions/strategies.

Population and Housing

3.8 It should be noted that further evidence is scheduled to be prepared as part of the continual need to remain appraised and up to date in relation to population changes and resultant household requirements. The withdrawal by StatsWales of the original 2018 population and household projections, due to an error on migration patterns, and their subsequent and ongoing re-issuing will require further consideration.

3.9 In addition, evidence will need to reflect the impacts of Covid-19 in so far as it can be predicted at this stage. Consideration will be required on the potential impact of Covid-19 on the requirement for affordable homes particularly if there are economic challenges resulting in greater unemployment or employment instability. In addition, consideration may be required to establish any trend for additional in migration, particularly in rural areas arising from a response to lockdown.

3.10 The Deposit Revised LDP and its strategy seeks to ensure and enable access to a range and choice of homes as well as a target for the delivery of affordable homes – key in addressing affordability issues and to build sustainable and resilient communities. It is recognised that housing will have an important part to play in the economic recovery - evidence will be required to reflect the Council's recovery programme and the broader regeneration and strategic ambitions notably around maximising affordable housing provision, meeting housing need and providing opportunities to retain younger people and provide an attractive County for our younger people to return to.

Placemaking, Well-being and Green Infrastructure

3.11 Lockdown has emphasised the value and importance of place-making and of the provision of locally accessible open/green spaces for health and well-being and recreation. This is essential to our core purpose of building sustainable and resilient communities. The central role of placemaking was reinforced through the Minister's letter with the LDP as the key delivery mechanism.

Climate Change

3.12 The Deposit LDP places significant emphasis on the response to Climate Change with a proactive set of policies on a number of areas including electric charging points for vehicles as part of new developments.

3.13 There may be further scope to explore the relationship and compatibility with the Zero Carbon agenda. The potential for reduced car usage arising from home/agile working through a reduction in communing patterns is noted with opportunities to build on active travel and integrated sustainable transport solutions already embedded in the Plan.

Infrastructure

3.14 Further consideration may be required around the increased emphasis on digital infrastructure due to the increase in agile/home working. If successful, the trial measures being drawn up to support our High Streets and enable social distancing might become permanent.

Housing Viability

3.15 Whilst the short, medium, and indeed long-term impacts of the pandemic on the house building industry is yet unknown, evidence on housing viability will be updated to reflect the most up to date information available. It should however be noted that the economic impact is uncertain particularly given the potential for further disruption because of a second spike in infections.

Evidence Base – Non Covid-19 Implications

3.16 The following aspects of the Plan's evidence base will require further consideration / updating includes the following. This list is not exhaustive and subject to change as the implications arising from representations and other evidence and contextual changes emerge.

Population and Housing

3.17 Update on the Demographic evidence in response to revised WG 2018 based population projections.

Renewable Energy Assessment

3.18 Revision to reflect the representations received and the progress in the preparation of the National Development Framework and its policies and provisions on Renewable Energy.

Highways Paper

3.19 Develop upon the current evidence and to take account of representations received.

Rural Task Force: Ten Towns Growth Plans

3.20 As part of the findings of the rural task force the Council has commenced the development of growth plans for Ten prominent towns within the context of rural Carmarthenshire. The publication of these documents will further supplement and evidence the Council's regeneration ambitions for our rural areas.

Landscape Capacity Study

3.21 To support the application and implementation of the Deposit Revised LDP's landscape policies.

3.22 The following sets out an assessment and commentary impacts of Covid-19 in relation to the current evidence base for the Revised LDP.

Evidence/document	Sensitivity	Action
Consensus Building		
Advisory Panel Minute Book Volumes 1 and 2	None	No action required
Key Stakeholder Forum Meetings – Reports and Papers	None	No action required
Town and Community Council Workshop	None	No action required
Background Evidence		
Demographic Forecasts (Addendum Sept 2019)	Sensitive	Update will be required to consider the latest WG sub national projections and to consider any evidential changes in respect of Covid-19, including changing migration patterns.
Democratic Forecasts (Oct 2018)	See above	See above
Caeau Mynydd Mawr SAC – Revised SPG Evidence Papers	None	No action required
Two Counties Economic Study for Carmarthenshire and Pembrokeshire (October 2019)	Sensitive	Review of the current evidence base will be required in respect future economic activity arising from the outbreak and how this will impact on different sectors. This will include projected impacts from Covid.
Renewable Energy Assessment	None	No immediate action required. Note: Recognition of the role of renewables as part of the broader climate agenda in responding to Covid-19.
Carmarthenshire Gypsy Travellers	None	No action required

Accomodation Needs Assessment (Nov 2019)		
Carmarthenshire Rural Needs Study	None	No immediate action required. Further information may be necessary should evidence become available around immigration into rural communities.
Transport Background Paper 2020	None	No immediate action required. Note: Recognition of the role of active travel as part of the creation of sustainable future and placemaking in responding to Covid-19.
Housing Market Summary for Carmarthenshire (Dec 2019)	None	No immediate action required. To be kept under review to pick up on consequential changes arising from amendments to other components of the evidence base.
Welsh Language Impact Assessment 2019	None	No immediate action required. To be kept under review to pick up on consequential changes arising from amendments to other components of the evidence base.
Preliminary Report on Financial Viability (Nov 2019)	Sensitive	Evidence will need to respond to economic changes arising from the outbreak, notably impacts on the house building sector, supply line and land values.
Open Space Assessment	None	No immediate action required. Note: Recognition of the role of open space and Green Infrastructure as parts of the Placemaking agenda in responding to Covid-19.
Retail Study Update 2015	Sensitive	The retail sector (notably comparison) has been hard hit by the pandemic with many non-essential outlets experiencing long closures during lockdown and a slow return of customers during the recovery stage. The leisure and cultural sector incl. pubs and restaurants have also been hit along with community and entertainment venues. The study requires updating to reflect the outcomes of Covid but also subsequent changes to floorspace evidence across the comparison and convenience sectors. Recognition of the focus on the role town

		centres as contained with PPW and as part of the WG post Covid recovery response.
Employment Land Reviews 2016 - 2018	Sensitive	The ELR's are an annual monitoring mechanism – future reports will need to measure any post Covid impacts.
Green Infrastructure Assessment	None	No immediate action required. Note: Recognition of the role of open space and Green Infrastructure as parts of the Placemaking agenda in responding to Covid-19.
Topic Paper – Issues, Vison and Objectives (Dec 2019)	None	The Issues, Objectives and the Vision remain consistent and relevant post Covid.
Topic Paper – Waste (Oct 2019)	None	No action required
Topic Paper - Minerals (Oct 2019)	None	No action required
Topic Paper - Welsh language (Aug 2019)	None	No immediate action required. To be kept under review to pick up on consequential changes arising from amendments to other components of the evidence base.
Topic Paper - Role and Function Update (Jan 2020)	Sensitive	No immediate action required. Review to pick up on consequential changes arising from amendments to other components of the evidence base.
Topic Paper – Spatial Framework and Housing Supply (Jan 2020)	Sensitive	No immediate action required Whilst not requiring a change in terms of the strategy and the spatial framework any update will need to consider the latest WG sub national projections and to consider any evidential changes in respect of Covid-19, including changing migration patterns
Topic Paper – Population and Household Projections (Sept 2019)	Sensitive	Update will be required to consider the latest WG sub national projections and to consider any evidential changes in respect of Covid-19, including changing migration patterns.
Topic Paper – Infrastructure Assessment (Jan 2020)	Sensitive	Evidence will need to consider the increased expectations and requirements arising from homeworking. Focus on highspeed and reliable broadband infrastructure.
Topic Paper – Development Limits (Dec 2019)	None	No immediate action required.

		Review to pick up on consequential changes arising from amendments to other components of the evidence base.
Topic Paper – Spatial Options	None	No action required.
Flooding Evidence		
Carmarthenshire and Pembrokeshire Stage 1 SFCA	None	No action required.
SFCA – Existing Allocations	None	No action required.
SFCA – Candidate Sites	None	No action required.
Stage 1b SFCA – Llanelli, Burry Port and surrounding areas	None	No action required.
Supporting Documents		
Delivery Agreement	Sensitive	An extension to the current timetable of 7 months is required. The Revised DA will be submitted for agreement to the WG. Additional amendments will be required to the community involvement scheme to reflect revised approaches to engagement and the availability of documents.
Sustainability Appraisal	Sensitive	A further assessment will be necessary to assess the nature (if any) of the impacts arising from Covid and the consequential amendments to the Revised LDP.
Habitat Regulations Assessment	Sensitive	A further assessment will be necessary to assess the nature (if any) of the impacts arising from Covid and the consequential amendments to the Revised LDP.

4. Revised LDP Strategy

4.1 The strategic direction of the Revised LDP is underpinned by the principles of sustainable development, whilst reflecting the diversity of the County's environments, economies, and its communities. In this regard it has sought to respond to this diversity by providing opportunities for balanced and sustainable growth whist reflecting the needs of its communities and the cultural, linguistic, built, and environmental qualities.

4.2 The Plan's preparation and that of its strategy is in accordance with national policy and legislation but also the Wellbeing of Future Generation Act and its goals as well as the Carmarthenshire Well-being Plan: The Carmarthenshire We Want 2018 - 2023.

4.3 The Vision, Objectives and Strategy reflect the wider issues facing the area both within the urban and rural context. Whilst it is accepted that Covid-19 may exacerbate specific issues, such as a declining town centres they are all matters currently considered within the Plan. However, as above it is recognised that additional evidence may be required to further understand the implications, and where appropriate refine policy approaches. They do not sufficiently materially affect the Plan to warrant an amendment to its strategy.

4.4 As recognised by the Minister in her letter of the 7th July Covid-19 has also brough fresh focus on long held priorities such as the importance of green infrastructure. The value and role these spaces play is recognised within the Plan and the strategy. However, consideration will be given to augmenting evidence to add to our knowledge of the extent and location of Green Infrastructure, and through a GI strategy to turn the focus toward implementation. This will be undertaken without requiring any changes to the strategy.

4.5 Whilst the Deposit Revised LDP recognises the issues around climate change and the zero-carbon agenda and takes active steps to incorporate them within a land use document, the Plan will further iterate to reflect these priority themes. Whilst not requiring a change in the strategy they remain of integral importance to the land use planning system in moving forward as such further changes will be made as appropriate.

5. Policy Implications – Covid-19

5.1 The following list identifies specific policy areas where there may be amendments arising from, and in response to Covid-19. Please note the specific he amendments to the Plan are not detailed below but will form part of the Focused Changes and will be subject to public consultation ahead of submission for Examination. The list should not be viewed ad definitive and/or exhaustive:

Policy		Covid-19 Commentary
Strategic Policy – SP1: Strategic Growth		No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
SG1:	Regeneration and Mixed-Use Sites	No Covid-19 related changes anticipated.
SG2:	Reserve Sites	No Covid-19 related changes anticipated.
SG3:	Pembrey Peninsula	No Covid-19 related changes anticipated.
Strategic Policy – SP2: Retail and Town Centres		Potential for changes reflecting the impacts arising from Covid-19. It is recognised that retail and notably town centres have been highlighted as an area impacted directly by the outbreak. Any changes to the policy will reflect evidence, contextual factors (changes in guidance) and the need to reflect recovery plans and proposals. Where appropriate further consideration to be given to the potential benefits on town centres and their attractiveness to consumers of Green Infrastructure etc.
RTC1:	Carmarthen Town Centre	Potential for changes reflecting the impacts arising from Covid-19. It is recognised that retail and notably town centres have been highlighted as an area impacted directly by the outbreak. Any changes to the policy will reflect evidence, contextual factors (changes in guidance) and the need to reflect recovery plans and proposals. Where appropriate further consideration to be given to the potential benefits on town centres and their attractiveness to consumers of Green Infrastructure etc.
RTC2:	Protection of Local Shops and Facilities	Potential for changes reflecting the impacts arising from Covid-19. It is recognised that retail and notably town centres have been highlighted as an area impacted directly by the outbreak. Any changes to the policy will reflect evidence, contextual factors (changes in guidance) and the need to reflect recovery plans and proposals. It is noted that the role of local retail and facilities make an important contribution to settlements and communities across the County, including those in a rural context. In this respect their role will be appropriately considered considering any evidence around a more local a convenience focused approach to accessing retail provision.

RTC3:	Retail in Rural Areas	Potential for changes reflecting the impacts arising from Covid-19. It is recognised that retail and notably town centres have been highlighted as an area impacted directly by the outbreak. Any changes to the policy will reflect evidence, contextual factors (changes in guidance) and the need to reflect recovery plans and proposals. It is noted that the role of local retail and facilities make an important contribution to settlements and communities across the County, including those in a rural context. In this respect their role will be appropriately considered considering any evidence around a more local a convenience focused approach to accessing retail provision.
Strategic Policy – SP3: A Sustainable Approach to Providing New Homes		No specific changes identified. Policy may require iteration because of evidential review arising from Covid-19.
HOM1:	Housing Allocations	No Covid-19 related changes anticipated.
HOM2:	Housing within Development Limits	No Covid-19 related changes anticipated.
HOM3:	Homes in Rural Villages	No Covid-19 related changes anticipated.
HOM4:	Homes in Non-Defined Rural Settlements	No Covid-19 related changes anticipated.
HOM5:	Conversion or Subdivision of Existing Dwellings	No Covid-19 related changes anticipated.
HOM6:	Specialist Housing	No Covid-19 related changes anticipated.
HOM7:	Renovation of Derelict or Abandoned Dwellings	No Covid-19 related changes anticipated.
HOM8:	Residential Caravans	No Covid-19 related changes anticipated.
HOM9:	Ancillary Residential Development	No Covid-19 related changes anticipated.
Strategic Policy – SP4: Affordable Homes Strategy		No Covid-19 related changes anticipated.
AHOM1:	Provision of Affordable Homes	No Covid-19 related changes anticipated.
AHOM2:	Affordable Homes- Exceptions Sites	No Covid-19 related changes anticipated.
Strategic Policy – SP5: Strategic Sites		No Covid-19 related changes anticipated.
Strategic Policy – SP6: Employment and the Economy		No specific changes identified. Policy may require iteration because of evidential review arising from Covid-19.

EME1:	Employment- Safeguarding of Employment Sites	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
EME2:	Employment- Extensions and Intensification	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
EME3:	Employment Proposals on Allocated Sites	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
EME4:	Employment Proposals on Non-Allocated Sites	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
EME5:	Home Working	Policy may require iteration to reflect issues arising from Covid-19 and the potential increase in home working.
Strategic Policy – SP7: Welsh Language and Culture		No Covid-19 related changes anticipated. Note: reference should be had to any potential changes in demographic evidence and in migration.
WL1:	The Welsh Language and New Developments	No Covid-19 related changes anticipated.
Strategic Policy – SP8: Infrastructure		No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19.
INF1:	Planning Obligations	No Covid-19 related changes anticipated.
INF2:	Healthy Communities	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19. Reference is however had to the implications of Covid-19 on the more socially and economically challenged.
INF3:	Broadband and Telecommunications	Potential for amendment recognising the impacts arising from Covid-19 – the lockdown has seen an increase in home and remote working. This has further highlighted the importance of good and reliable broadband connections. The issue is particularly prevalent in our rural communities and is reflected in the Council's emerging recovery plans and proposals.
INF4:	Llanelli Waste Water Treatment Surface Water Disposal	No Covid-19 related changes anticipated.
Strategic Policy – SP9: Gypsy and Traveller Provision		No Covid-19 related changes anticipated.
GTP1:	Gypsy and Traveller Accommodation	No Covid-19 related changes anticipated.

Strategic Policy – SP10: The Visitor Economy		Potential for changes reflecting the impacts arising from Covid-19. The prominence in the immediate post lockdown of 'staycations' as an alternative to the disruption in foreign travel is noted. The short- or long-term nature of this trend will be considered as part of responding to the Council's recovery plans and evidence.
VE1:	Visitor Attractions and Facilities	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19. Refer to the comments in respect of SP10.
VE2:	Permanent Holiday Accommodation	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19. Refer to the comments in respect of SP10.
VE3:	Touring Caravan, Camping and Glamping Sites	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19. Refer to the comments in respect of SP10.
VE4:	Static Caravan and Chalet Sites	No specific changes identified. Policy may require iteration as a result of evidential review arising from Covid-19. Refer to the comments in respect of SP10.
Strategic Policy – SP11: Placemaking and Sustainable Places		Potential for changes reflecting the impacts arising from Covid-19. The policy includes provisions in relation to placemaking, Green Infrastructure and the impacts of climate change. However, a further review will be undertaken considering evidence and the Covid -19 and iterated accordingly.
PSD1:	Sustainable and High-Quality Design	Potential for changes reflecting the impacts arising from Covid-19. The policy includes provisions in relation to placemaking and Green Infrastructure. However, a further review will be undertaken considering evidence and the Covid -19 and iterated accordingly.
PSD2:	Masterplanning Principles – Creating Sustainable Neighbourhoods	Potential for changes reflecting the impacts arising from Covid-19.

		The policy includes provisions in relation to placemaking, Green Infrastructure and the impacts of climate change. However, a further review will be undertaken considering evidence and the Covid -19 and iterated accordingly.
PSD3:	Green Infrastructure Network	Potential for changes reflecting the impacts arising from Covid-19. The policy includes provisions in relation to placemaking and Green Infrastructure. However, a further review will be undertaken considering evidence and the Covid -19 and iterated accordingly.
PSD4:	Green Infrastructure – Trees, Woodlands, and Hedgerows	Potential for changes reflecting the impacts arising from Covid-19.
PSD5:	Development and the Circular Economy	No Covid-19 related changes anticipated.
PSD6:	Community Facilities	No Covid-19 related changes anticipated. The impact of Covid-19 on the most socially and economically challenged within communities is recognised.
PSD7:	Protection of Open Space	No Covid-19 related changes anticipated. The impact of Covid-19 on the most socially and economically challenged within communities is recognised.
PSD8:	Provision of New Open Space	No Covid-19 related changes anticipated. The impact of Covid-19 on the most socially and economically challenged within communities is recognised.
PSD9:	Advertisements	No Covid-19 related changes anticipated.
PSD10:	Extensions	No Covid-19 related changes anticipated.
PSD11:	Noise Pollution	No Covid-19 related changes anticipated.
PSD12:	Light and Air Pollution	No Covid-19 related changes anticipated.
PSD13:	Contaminated Land	No Covid-19 related changes anticipated.
Strategic Policy – SP12: Rural Development		No Covid-19 related changes anticipated.
RD1:	Replacement Dwelling in the Open Countryside	No Covid-19 related changes anticipated.
RD2:	Conversion and Re-Use of Rural Buildings for Residential Use	No Covid-19 related changes anticipated.
RD3:	Farm Diversification	No Covid-19 related changes anticipated.
RD4:	Conversion and Re-Use of Rural Buildings for Non-Residential Use	No Covid-19 related changes anticipated.
RD5:	Equestrian Facilities	No Covid-19 related changes anticipated.

Strategic Policy – SP13: Maintaining and Enhancing the Natural Environment		No Covid-19 related changes anticipated.
NE1:	Regional and Local Designations	No Covid-19 related changes anticipated.
NE2:	Biodiversity	No Covid-19 related changes anticipated.
NE3:	Corridors, Networks and Features of Distinctiveness	No Covid-19 related changes anticipated.
NE4:	Development within the Caeau Mynydd Mawr SPG Area	No Covid-19 related changes anticipated.
NE5:	Coastal Management	
NE6:	Coastal Development	
NE7:	Coastal Change Management Area	No Covid-19 related changes anticipated.
Strategic Policy – SP14: Protection and Enhancement of the Built and Historic Environment		No Covid-19 related changes anticipated.
BHE1:	Listed Buildings and Conservation Areas	No Covid-19 related changes anticipated.
BHE2:	Landscape Character	Limited potential for changes reflecting the impacts arising from Covid-19. The policy includes provisions in relation to placemaking and Green Infrastructure.
Strategic Policy – SP15: Climate Change		Potential for changes reflecting the impacts arising from Covid-19. Further scope to explore the relationship and compatibility with the Zero Carbon agenda.
CCH1:	Renewable Energy	No Covid-19 related changes anticipated.
CCH2:	Electric Vehicle Charging Points	No Covid-19 related changes anticipated.
CCH3:	Water Quality and Protection of Water Resources	No Covid-19 related changes anticipated.
CCH4:	Flood Risk Management and Avoidance	No Covid-19 related changes anticipated.
CCH5:	Renewable and Low Carbon Energy in New Developments	No Covid-19 related changes anticipated.
CCH6:	Climate Change – Forest, Woodland and Tree Planting	No Covid-19 related changes anticipated.
Strategic Policy – SP16: Sustainable Distribution – Settlement Framework		No Covid-19 related changes anticipated.

SD1:	Development Limits	No Covid-19 related changes anticipated.
Strategic Policy – SP17: Transport and Accessibility		No Covid-19 related changes anticipated.
TRA1:	Transport and Highways Infrastructural Improvements	No Covid-19 related changes anticipated.
TRA2:	Active Travel	No Covid-19 related changes anticipated.
TRA3:	Gwili Railway	No Covid-19 related changes anticipated.
TRA4:	Redundant Rail Corridors	No Covid-19 related changes anticipated.
TRA5:	Highways and Access Standards in Development	No Covid-19 related changes anticipated.
Strategic Policy – SP18: Mineral Resources		No Covid-19 related changes anticipated.
MR1:	Mineral Proposals	No Covid-19 related changes anticipated.
MR2:	Mineral Buffer Zones	No Covid-19 related changes anticipated.
MR3:	Mineral Safeguarding	No Covid-19 related changes anticipated.
Strategic Policy – SP19: Sustainable Waste Management		No Covid-19 related changes anticipated.
WM1:	Sustainable Waste Management and New Development	No Covid-19 related changes anticipated.
WM2:	Landfill Proposals	No Covid-19 related changes anticipated.
WM3:	Agricultural Land – Disposal of Inert Waste	No Covid-19 related changes anticipated.

Appendix 1

Short Term Impact	Generally, most developers were surprisingly positive and see the current crisis as a challenge but in some instances an opportunity. Rent reduction / rent free windows being requested by a few tenants also some high-profile tenants not paying rent. A few experiencing delays in incoming payments from tenants and clients. Mixed response on availability and rates of bank finance. Some construction materials difficult to get hold of such as plasterboard, plaster and concrete. Material price rises inevitable in short term due to lack of supply and increasing demand. Mixed response on anticipated values falling, some developers believe there will be no change others expecting problems with security / projected profit margins from expected devaluation. Difficult to plan for future as so many unknowns. A number of projects have been delayed although several were looking to return to site shortly or had returned to site on a limited basis. Delays being experienced with planning decisions (across Wales) and drainage responses etc. HMRC furlough payments slow. Appreciation of quick processing of business rates grant. Utility companies only doing emergency work. Current glut of available labour where previously in short supply
Key Constraints	Planning process – needs to be more responsive. Cost value GAP increasing low rentals higher costs. Increasing costs. Public sector too strong need to revitalise private sector. WG withdrawal from Housing association bond scheme. Lack of reasonable bank and development bank financing at reasonable costs. Lack of Gap funding schemes.

	Communication with local authority would be useful to have single point of contact. Speculative development unlikely due to higher risk etc Uncertainty on end values. Lost income / lack of productivity
Opportunities	Demand still exists for high quality properties. Opportunities to market stock / development sites to companies in key cities across UK looking to lower costs and increase quality of life to employees. Residential market strong plus relocations as above. Cheap stock and land for acquisition. Local and consistent procurement. Remote working practices / IT. Less competition. Staycations. Retirement villages vs care homes. Live / work schemes. Creative hubs. Appetite for joint venture working with Council. More efficient working practices, IT, home working, TEAMS, reduced travel costs etc. Opportunities for off-site working in construction sector.
Public and Private Sector Interventions Required	Gap funding support scheme / Property Development Fund. Higher intervention rates to assist with growing development gap figure. Forum of developers. Support to assist with deferring private sector tenants rent. Rental guarantees from LA. Joint venture projects potentially LA asset backed. Seed funding for development of innovative / risky projects. Low interest or zero interest/ fee commercial borrowing. Reduce / remove / freeze section 106 contributions. Use section 106 funds for economic development. Co-ordinated marketing of development / relocation site.