# DETAILED REPORT
# COVID-19 ECONOMIC IMPACT AND RECOVERY
# Restart, Revive, Renew

## BACKGROUND

The ongoing COVID-19 pandemic spread to the United Kingdom in late January 2020. By March the scale of the outbreak had already led businesses to change their working practice, such as sending staff to work from home. On March 23rd the UK government imposed a lockdown, banning all "non-essential" travel. The resulting impact on businesses and the economy has been severe with a significant number of businesses either being required, or choosing, to close - notably in the retail, hospitality and leisure sectors.

The Welsh Government introduced 2 separate grant schemes, the Non-Domestic Rates (NDR) Grant and the Economic Resilience Fund, to support businesses during the lockdown period. Other economic measures such as the Self-Employed Income Support Scheme and Coronavirus Job Retention Scheme were introduced. The Council established a small business rent relief scheme and offered a 3-month rent free period to all its commercial tenants.

The impact of the current lockdown and the enormous economic damage resulting from Covid-19 is self-evident as more reports on the scale of the impact emerge each day. The consequences for the public finances, businesses and households will be severe and drawn out.

Responding to this challenge will require imagination, determination and flexibility. Carrying on business as 'normal' is not an option. At times of crisis, opportunities present themselves to accelerate change and introduce structural reforms to enable success in the economy of the future. We need to show that we are in tune with the needs of businesses and communities across Carmarthenshire, and that we are prepared to take on the task of finding the right response to the sudden downturn in prospects for growth and jobs.

The first stage of the recovery process has been focused on understanding the impact of Covid-19 on our businesses, economy and communities. A questionnaire has been widely circulated to find out more about the impact that Covid-19 is having on Carmarthenshire businesses, to identify what is important to them in the short, medium and long-term, so that going forward we can provide them with the assistance they most need. A dedicated business team has been established. This team is currently undertaking direct dialogue to build relationships with key business sectors, developers and investors, to ensure that proposed recovery actions appropriately respond to the support that these businesses are telling us that they need moving forward. The findings of this engagement will provide the platform upon which we will develop our economic response and recovery proposals.

## IMPACT OF COVID-19

To gain an informed understanding of the position in Carmarthenshire, evidence has been gathered on the impact on our businesses, unemployment and 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 of this intelligence gathering follows:

## 1. Business / Economy

Evidence has been gathered via an electronic survey disseminated to businesses operating within the county to identify what is important to them in the short, medium and long-term, so that going forward we can provide them with the assistance they most need.

The survey includes a mix of both closed and open-ended questions, which has provided robust quantitative and qualitative information through which analysis has determined several reliable conclusions. A total of 574 businesses from across the county responded to the survey. A copy of the full report providing an analysis of the effects of the COVID-19 pandemic on the county of Carmarthenshire, is attached. 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. Given the precarious position many businesses find themselves in, should any further support mechanisms be developed then they too will need to be actioned quickly, with the aim of stemming the 'snow-ball' affect that are the impacts of this pandemic.

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. It could be argued that whilst a financial injection of support would be beneficial for many in the immediate term, if restrictions continue, or are reintroduced in the short-term following a reprieve, then many businesses would unfortunately find themselves in a

worrying predicament once again. The sustainability of this financial support would then become uncertain. In conjunction with this, local and national governments could develop a more sustainable and less cost intensive package of support with the aim of supporting businesses to diversify their operations i.e. moving to online selling, re- training staff, product development or aiding with marketing.

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. This is an example of a relatively low-cost and non-resource intensive offer of support placing the Council further at the forefront of assisting businesses to recover. This offer of support could be extended to all businesses irrespective of the sector that they operate in. This also aligns with the 'buy local' marketing message that could be promoted to the county's residents in the hope of providing a much-needed boost to the local companies who are the very foundation of our economy.

g) **There are areas of deprivation in the county where the effects of the pandemic could be felt more acutely.**
Community support initiatives should be focussed first and foremost in the areas highlighted as experiencing increased levels of deprivation. With many people feeling more isolated than ever before it is imperative that the Council continues its support and outreach work, to ensure that those most vulnerable in our communities receive the support that they need.

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.**
With the vast majority of respondents indicating that they would benefit from online training in the fields of IT/digital skills, marketing and diversification there is scope to offer subsidised training through provision that is already in existence as an alternative to cash grants. There is also scope to utilise the wealth of expertise readily available within the organisation to offer non-accredited online training resources.

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. They are also often aligned with the identified 'shutdown' sectors.**
Local Government and organisations such as the Regional Learning and Skills Partnership have a crucial role to play in assisting employers and businesses to identify the skills that they need and ensuring that suitable provision exists to meet these demands.

In addition to the online survey, telephone interviews have been conducted with 422 businesses. Many of the trends identified from the survey intelligence have been echoed and substantiated through the qualitative interviews and by other external organisations (Ymlaen

Llanelli, Federation of Small Businesses, South Wales Chamber of Commerce, Enterprise Hub Carmarthen, Business Wales). There is a general clear consensus across all intelligence that the pandemic has had an unmeasurable impact on the wellbeing of businesses across the county.

171 businesses are completely closed presently with many indicating that they are in a state of ‘hibernation’. A large proportion (166) are partially operating albeit at a reduced capacity, with the majority having placed a significant number of staff on furlough. It is clear that the businesses still trading are those able to operate online, work from home or those that have diversified their offer or service in response to the pandemic.

It seems several businesses operating within the financial and professional services sector such as estate agents and legal and insurance firms have been able to continue to trade through moving their staff to home-working. Whilst many have not been able to offer their full range of services, this has served to keep the respective businesses afloat in this uncertain time.

In response to a question about what support business need moving forward, the vast majority of businesses indicated that the support they desire is related to finance. 114 businesses indicated that an extended period of payment holidays or deferrals would be beneficial to them with a further 93 indicating that financial support in the form of a grant would be of help. The South Wales chamber of commerce have also highlighted the importance of financial support, specifically in the form of extensions to rate relief periods and re-opening grants.

19 businesses highlighted that assistance from the Council to support collaborative procurement, i.e. PPE and safety protection equipment would be welcomed. This would be a prudent approach ensuring economies of scale (where possible), driving efficiencies and reducing the risk for individual businesses (of which many are small enterprises). This is closely aligned to the desire from the Enterprise Hub to see support offered in collaborative tendering and local purchasing.

10 businesses would like help with promotion for either themselves or their industry as a whole. This is consistent with the message from the Tourism, Leisure and Hospitality sector which was identified through the survey returns and aligns with the call for national promotions from the Federation of Small Businesses.

Many businesses feel that there is a role for the Council to take the lead on developing and supporting campaigns which promote a ‘buy local’ message and encourage the development and protection of local supply chains. This is a key area of consideration for the county and if successful could alleviate some pressures and would serve to promote local, sustainable growth, supporting not only the businesses based in the county but also their employees and their customers.

A theme raised by several through the survey in relation to the offer of training (especially around digital skills, marketing, online marketing and setting up online shops) has been echoed once again. These findings have been further substantiated by a number of organisations including Coleg Sir Gar, Business Wales and the Enterprise Hub in Carmarthen who made specific reference to training or support in areas such as food safety, mental health first aid, managing finance, business planning, legal issues (especially around employment law) and debt management.

Unfortunately, 18 businesses reported that they were not eligible for any of the financial support grants currently in existence. Most of these businesses are sole traders with no employees. These findings are consistent with those deduced from the impact survey.

78 businesses indicated that they are unsure about what help the Council could offer in addition to what is already being offered. In many circumstances reference was made to the help these businesses had already received for which they were grateful.

The sad reality of the situation is that many businesses will fail, and others will take a significant length of time to get back to where they were. The impact across the UK has been estimated to be as much as one third of total GDP in some sectors. By contrast, some areas of the economy have seen employment growth including distribution, online retail and healthcare. To what extent this is short term growth is unknown and evidence indicates that this temporary employment may be slowing.

## 2. Unemployment in Carmarthenshire

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%.

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** | |
|---|---|---|---|---|
| | **April 2019** | **April 2020** | **April 2019** | **April 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 |

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).

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.

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.

## 3. Rural Towns

Prior to the current crisis we were working with consultants to develop growth plans to revitalise our 10 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 amplified by the economic whirlwind brought about by the pandemic. The anticipated economic impacts of Coronavirus on 5 of the 10 Towns (shown in bold) has been considered by Owen Davies Consulting. 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

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

## 4. Primary Town Centres

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 UK and Welsh Governments have imposed restrictions on the operation of businesses which has specifically targeted the retail sector. Jobs in these businesses are particularly affected as the businesses will be following government restrictions. Retail businesses will be vulnerable due to shop closures and a strong drop in demand from consumers. 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.

The initial issues identified and intelligence coming out of those towns are that there will be a need to:

- 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.
- Consider alternative uses of derelict sites / empty buildings / potential future development sites in the interim.
- 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.
- Clear roles and coordination of BIDS / town Centre forums / taskforces/CCC

The Centre for Towns, an independent non-partisan 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.

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.

The lockdown will ease in a phased manner. Plans are currently being put in place to restart our indoor and outdoor markets when it is safe to do so. We are also developing a strategy, working with multiple stakeholders, to ensure that our town centres fully support local businesses, retailing, social and leisure activity. immediate priorities to be achieved include:

- Signage
- Communications with businesses
- Public Conveniences
- Bus Stations
- Car Parks
- Street Furniture issues (e.g. benches)

This will swiftly be followed by more strategic projects for infrastructure that include:

- Re designating street space (including pedestrianisation)
- Re designating infrastructure and plans
- Enforcement

## 5. Developer / Investor Confidence

Some 15 local, regional and national developers were contacted in respect of their businesses and how they have been impacted by Covid 19. The discussion with developers revolved around 4 main themes:

- 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

**Summary of feedback Received**

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|---|---|
| **Short Term Impact** | • Generally, most developers were surprisingly positive and see the current crisis as a challenge but in some instances an opportunity.<br>• Rent reduction / rent free windows being requested by a few tenants also some high-profile tenants not paying rent.<br>• A few experiencing delays in incoming payments from tenants and clients.<br>• Mixed response on availability and rates of bank finance.<br>• Some construction materials difficult to get hold of such as plasterboard, plaster and concrete.<br>• Material price rises inevitable in short term due to lack of supply and increasing demand.<br>• 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.<br>• Difficult to plan for future as so many unknowns.<br>• 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.<br>• Delays being experienced with planning decisions (across Wales) and drainage responses etc.<br>• HMRC furlough payments slow.<br>• Appreciation of quick processing of business rates grant.<br>• Utility companies only doing emergency work.<br>• Current glut of available labour where previously in short supply (Brick layers). |
| **Key Constraints** | • Planning process – needs to be more responsive.<br>• Cost value GAP increasing low rentals higher costs.<br>• Increasing costs.<br>• Public sector too strong need to revitalise private sector.<br>• WG withdrawal from Housing association bond scheme.<br>• Lack of reasonable bank and development bank financing at reasonable costs.<br>• Lack of Gap funding schemes such as PDF and business schemes such as CREF.<br>• Communication with local authority would be useful to have single point of contact.<br>• Speculative development unlikely due to higher risk etc<br>• Uncertainty on end values.<br>• Lost income / lack of productivity |

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

## CARMARTHENSHIRE'S RECOVERY STRATEGY – RESTART REVIVE RENEW

In response to the above issues we are proposing a strategy which outlines what is required during the Covid-19 recovery period to ensure that the Carmarthenshire's economy can recover as quickly as possible. Carmarthenshire's economic recovery needs to be realised as part of a new three-phase economic plan that includes restarting of the local economy followed by a revival phase and long-term renewal. The findings of this impact report are a snapshot of informing the restart phase.

The intelligence gathered clearly demonstrates that the local economy faces a difficult time in coming months as the effects of the Covid-19 crisis puts pressure on jobs and demand. Through acting together, the authority and its partners can take action to restore consumer and business confidence to stimulate investment in our economies, which will create employment and help the unemployed find new jobs.

As a platform to the development and delivery of the economic recovery plan, Carmarthenshire County Council has set up a business, economy and community recovery group to coordinate development and delivery. That group has identified several draft potential action strands and proposals for further consideration. In order to move forward Carmarthenshire County Council is seeking to employ external economic advice to assist with bringing this information together and to map out a plan for future projects and tasks to give a kick start and boost to the local economy.

An overarching advisory group, comprising key private sector industry leaders, will be established to assist us with the development and refinement of our draft plan (summarised below) and to lead us through the current crisis. This group will set the vision and direction for recovery.

**The Draft Economic Recovery Plan**

Carmarthenshire's Economic Recovery Plan is focused on 11 key areas:

1. ***Capital Infrastructure***
   - Continue with significant regeneration capital infrastructure investments to boost demand in the construction sector and stimulate confidence.

2. ***Business Support***
   - Review of current priorities is required with greater emphasis on engagement. Focus on sector specific as necessary. Greater staff resource required through re-modelling of service. Financial support to assist with recovery. Re-prioritise the Business engagement strategy.
   - Set up a business support hotline to support and provide guidance to Carmarthenshire businesses on funding, recovery and general advice.
   - Investigate possibility of negotiating bulk purchase / subsidised deals for businesses.
   - Refocus Communities for Work to provide training and work experience to people who have become unemployed as a result of Covid 19.
   - Workways + provide assistance for the unemployed as a consequence of Covid 19 - ref Short Term Unemployed.
   - Investigate possibility of reinvention of Future Jobs Fund to provide guaranteed, paid employment for young people.

3. ***Town Centre Economy***
   - Reviewing and refocusing primary town centre regeneration master and recovery plans.
   - Develop safe town centre environment plans.
   - Supporting BIDs in Carmarthen & Llanelli
   - Review current parking initiatives/provisions throughout the County.
   - Acquisition of empty retail premises to revive economic buoyancy/footfall through innovation.
   - Consider county-wide development order for town centres.
   - Put in place arrangements for resumption of trading at our indoor and outdoor Markets – ensuring compliance with regulations and staff and shopper safety.

4. ***Procurement***
   - Explore if we can increase the value and volume of procurement from locally based SME's, compliantly within the Procurement Regulations.
   - Investigate possibility of sub £25k (3 quotes) through an update of our Council's Contract Procedure Rules to stipulate of the 3 quotes sought one should be from a supplier within the County.

- Opportunity to strengthen our Community Benefits approach.

***5. Planning***

- Consider relaxation of the emerging LDP for the creation of additional employment areas particularly for B2 uses and small business startups. Consider also any interim options.
- Consider the emerging LDP in terms of home working and the concept of live / work. Consider also any interim options.
- Consider feasibility of reallocating S.106 monies where possible to economic development activity.
- Consider whether there should, or could be, a prioritisation approach for applications that will generate job opportunities/economic benefits.
- Review and simplify planning support for key economic development applications (small and large).

***6. Rural Economy***

- Review and prioritise Council's Moving Rural Carmarthenshire Forward recommendations and projects.
- Foundational Economy Fund - develop a local food strategy.
- Review 10 town growth plans.
- Investigate feasibility of developing co-operation led milk processing facilities within Carmarthenshire.
- Review Arfor rural business support.

***7. Communities***

- Support local communities to become more self-resilient with sustainable local supply chains.
- Realignment of Bureau function.
- Review the Authorities poverty support measures and priorities.
- Third sector support.
- Deliver community led projects – Leader.
- Reprioritise and grow grant funding to Covid-19 community resilience projects.

***8. Digital Connectivity***

- Deliver Digital infrastructure regional City Deal project being led by the Council.
- Deliver LEADER funded project to support digital infrastructure in rural areas of Carmarthenshire.

***9. Skills***

- Skills and Talent Swansea Bay City Deal project - identify new ways of working and the new skills and technology required in order to deliver this across the region.
- Develop local skills action plan.

***10. Tourism & Events***

- Review current Marketing Destination plans. Ail-ddarganfod Sir Gar / Re-discover Carmarthenshire – assist promotion and marketing of local businesses.
- Road Cycling Marketing Campaign - Work with accommodation providers as to what ride and stay packages can be offered and when

- Cultural Heritage Campaign - Celtic Routes - opportunity to continue this project with a further £1million budget into 2021 will deliver tangible visitors to Carmarthenshire.
- Maximising Signature & Major Events - Major events such as the Tour of Britain can contribute £750k economic impact over a weekend, and a smaller event like Llandovery Grit Fest £50k.

***11. Land and assets***

- Review accommodation programme considering changing working practice and agile working.
- Reprofile capital receipts and potentially target certain sectors.
- Energy efficiency and local energy generation - focus in the short term on invest to save Re:fit scheme.
- Review land availability and reprofile as necessary to ensure that best use of council owned land is being made to support the local economy.
- Development of incubator/commercial accommodation and medium sized food based and production units.

In some areas there will be a need to challenge current ways of working and regulations to maximise opportunities for local businesses and to make it as simple as possible for business to open and expand in Carmarthenshire. Now is the time to make real change, to make a difference we must have the courage to challenge the norm. There will also be a need for some financial resource to be made available to support some activities and initiatives to respond to the identified challenges.

It is recommended that Members approve the proposed draft recovery strategy key themes and actions before they are considered by the proposed overarching business forum group.