
Achieving the Future Role

The previous two chapters have set out the way in which future complementarity is expected to function in respect of the distribution of key services and functions and the resultant key role of different settlements. In line with the vision for complementarity, this has shown that the future shape of facility and service delivery represents a logical and proportionate development from the current situation. This approach is considered to be the most practicable and to have the greatest potential of being delivered. In this chapter, we consider the various actions and steps that are necessary to achieve the future roles, as a basis by which the Welsh Assembly Government and the three local authorities might seek to establish and implement a strategy for the delivery of improvements to each of the settlements and the wider Spatial Plan Area.

An understanding of the actions that are necessary to achieve the vision for complementarity within the Spatial Plan Area must, however, be set within the context of an appreciation of the barriers to delivery which might serve to undermine the vision for change. These include:

- a **Market realism** – if a strategy is to be deliverable, it must be capable of stimulating market interest and investment and should be viable and sustainable in the longer term. The market realism of particular elements of the complementarity strategy for the Spatial Plan Area should therefore be subject to detailed testing to ensure that they can be viable and deliverable and that they can deliver the change that is being sought.
- b **Recession** – the cyclical nature of the economy means that the economy will return to a period of growth and commentators are anticipating that this should start to happen in 2010. Although the recession is likely to result in lasting changes to the national and international economy, its impact will be mitigated when viewed in the longer-term context. In spite of this, it is evident that it represents a potentially substantial barrier to the implementation of the vision for complementarity at this time. A reduced private sector capacity for investment, together with increased pressures upon public sector funding means that the potential for short term progress will be reduced. However, as a long term strategic vision, and subject to a consideration of the on-going market realism of options, this should be viewed as a matter of phasing rather than necessarily resulting in an inability to achieve any change in the future.
- c **Short-termism** – in the context of the current recession, the challenge of short-termism is particularly acute. The need to balance the importance of delivering the best and most long lasting solutions against the aspiration for quick fixes can often represent a barrier to the delivery of the identified vision for an area. At this time, there is a particular danger that the adoption of a short-term approach might result in a suite of policies and programmes

that do not take account of the expectation of future economic growth and that therefore do not achieve the type of change that is capable of being delivered over the longer term and which would provide the most beneficial solution to existing local issues.

- d **Funding** – delivering the actions that would contribute towards improved complementarity will require substantial levels of investment from the public and the private sector. A failure to achieve the necessary finance would result in an inability to implement the necessary policies and programmes. As such, very careful consideration must be given to availability of appropriate sources of funding and the ways in which these can be obtained. Given the current economic climate, this might represent a considerable challenge and will necessitate a phased approach to delivery, based upon an understanding of the key priorities and potential deliverability issues.
- e **Aspiration** – the success of delivery will rest upon the extent to which it accords with an identified aspiration for change. If the aspiration for the development of particular sectors or settlements does not accord with the vision for complementarity or the vision does not accord with the aspiration, then there is a danger that it would not be deliverable or successful. The need for the vision and aspirations to be in alignment have been taken into account in the preparation of this strategy.
- f **Commitment** – the successful delivery of the vision for complementarity will necessitate buy-in from a wide range of stakeholders. A failure to achieve this commitment from those that would be involved in its implementation – perhaps because of pressure to adopt an alternative approach – could be harmful to the long term viability of the strategy.
- g **Policy** – whilst appropriate policies can be supportive of growth, restrictive policies could act as a substantial barrier to the delivery of change and the achievement of complementarity within the Spatial Plan Area. At the local level, careful consideration should be given to the implications of policies in respect of the location, scale and type of growth. At this time of LDP preparation, it will be important to ensure that an appropriate policy framework can be established that will facilitate – and not stifle – the delivery of increased levels of complementarity within the Spatial Plan Area.
- h **Capacity** – at the most fundamental level, it is vital to ensure that there is capacity to support the various initiatives that would contribute towards improved complementarity. A failure to do so might render a potentially successful and positive project undeliverable. This might relate to:
 - i the need to provide space (either in terms of development land or premises) for growth,

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- ii the environmental capacity of the Spatial Plan Area and individual settlements to accommodate further growth without significant impacts (relating, for example to landscape, ecology, flood risk, water and air quality and other sustainability criteria),
 - iii the requirement for (and the ability to provide) training opportunities, marketing and promotion support and financial assistance, and
 - iv the necessary infrastructure (such as energy, water, drainage, sewerage and communications) that would underpin a stronger economy and a more complementary distribution of facilities and services.

5.3 An understanding of the potential barriers to growth represents an important basis by which they might be overcome and the vision for complementarity might thereby be implemented. In summary, there is a need for a clear awareness of the market and other realities that exist and the ways in which these might impact upon the development strategy. This should be rooted in an appreciation of the type of change that is being sought and should lead to strong policies that help to create a positive platform for the delivery of the vision for complementarity and for the Spatial Plan Area as a whole.

Housing

5.4 Housing has been identified as a cornerstone of complementarity and a basis by which a greater level of integration might be achieved between the demand for and supply of services. Whilst the largest centres have the most services and concentration of population, Pembrokeshire and Carmarthenshire are essentially rural Counties and future residential development needs to be balanced to ensure both urban and rural areas can be sustained. Growth should be directed to settlements with existing services. In seeking to achieve this aim, the following actions are recommended:

- a Make allocations of land for residential development, especially in the main settlements, but also those settlements with a basic level of services and support this with the provision of necessary services and facilities to serve the local population.
- b Provide a policy to ensure that windfall development (housing on non-allocated land) is only permitted in appropriate locations, protecting sensitive locations from inappropriate development.
- c Adopt a proactive approach to delivery prioritising in the first instance Carmarthen and the Haven Towns whilst also recognising the potential role of smaller centres with some services in the Spatial Plan Area. Within those areas that are to be most favoured for development, seek to identify and address potential barriers to delivery.
- d Work with utility providers to ensure sufficient capacity to accommodate residential development.

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- e Work with the private sector in order to maintain (and as appropriate, increase) the supply of private market, particularly during this time of continued market difficulty.
 - f Promote affordable housing delivery through a range of appropriate mechanisms such as:
 - i The promotion of Section 106 affordable housing requirements, including a review of affordable housing thresholds and requirements tested against viability. This should include consideration of other potential Section 106 requirements for community infrastructure and the contribution that a community infrastructure levy might make.
 - ii The continued adoption of rural exceptions sites for 100% affordable schemes.
 - iii The encouragement of 100% affordable schemes in other locations.
 - iv As part of this, the potential for increasing Social Housing Grant allocations to Local Authorities should be explored.
 - v Use of powers available from the 2004 Housing Act to bring empty properties back into beneficial use as affordable housing.
 - vi The sale of local authority owned land for affordable housing purposes.

In seeking to increase the supply of affordable housing, the key focus should be upon the need to ensure that the housing needs of everyone in the community can be met. The monitoring of delivery and (if necessary) targeted action to increase supply should form an important basis of the action that is to be taken by the local authorities and a mechanism by which an adequate supply of affordable housing will be provided.

- g Consider the level of need for special needs housing and identify how this might best be delivered.

- 5.5 Residential development must adequately provide for the housing needs of the local population. In addition consideration must be given to projected demographic change and what levels of growth may be appropriate to meet competing sustainability objectives. Development should be accessible to services and sustainable in terms of location and performance (e.g. as measured against the code for sustainable homes) of new properties.

Economy / Employment

- 5.6 The vision for complementarity in economic and employment terms will largely result in a continuation of existing patterns of activity. However, a key development should be the diversification of the local economy in order to enhance its robustness and the delivery of sufficient physical, intellectual and support capacity in order to facilitate growth. The following key recommendations would help to achieve the changes that are necessary at this time:

- a In order to encourage a diversification of the local economy, a series of sector studies and strategies should be undertaken, focusing upon:

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- i agriculture;
 - ii the energy sector;
 - iii the environmental sector;
 - iv the transportation sector (considering the potential for the further development of the ports and the airport);
 - v the high technology and research and development sectors; and,
 - vi business services.

These strategies should consider the opportunities that exist for sustainable long term development within each of these sectors in terms of:

- i the options for further growth;
 - ii the potential scale of growth;
 - iii the main locations within which growth is to be focused;
 - iv the key requirements that would be necessary in order to stimulate growth in terms of land and property requirements, funding, skills, the promotion of the area and the removal of any barriers to development; and,
 - v the types of input that is to be sought from the public and private sectors.
- b Provide sufficient physical capacity to support the growth of existing and new employment sectors. The provision of appropriate space for business activity is central to attracting and retaining local and inward investment. It will be important to identify enough space to meet the future development needs and also to ensure that this is provided in the most appropriate locations. An employment land review is being undertaken in Carmarthenshire and should similarly be prepared in Pembrokeshire. These documents will be important in setting out the land requirements for future employment development and in identifying the most appropriate locations for future growth.
- c Recognising their economic importance, Carmarthen, Haverfordwest, Milford Haven and Pembroke Dock should be prioritised for development. A range of sites of different types and locations will be necessary in these towns including offices (Carmarthen and Haverfordwest), additional land for energy development (Pembroke Dock and Milford Haven), and facilities for research and development and high technology activities in all locations.
- d Make allocations of land for employment development, especially in the key settlements detailed above and support this with the provision of necessary services and facilities to serve businesses and workers.
- e Drawing upon its status as a Knowledge Economy Centre, Carmarthen should be promoted as a complementary R&D location to Swansea and Llanelli. The achievement of this aim might necessitate the identification of employment sites within the town in the LDP. As part of the consideration of the future role of Carmarthen as a major element of the economy of the Spatial Plan Area and the County, it might be appropriate to review the

distribution of employment sites in order to increase the opportunity for and the attractiveness of sustainable and viable growth in Carmarthen.

- f Identify and allocate potential land for port related activities in Fishguard. The purpose of this would be to facilitate the direct expansion of port and marina related functions and operations and the development of associated (spin-off) activities that would be appropriate in this location and would be beneficial to the viability of Fishguard's economy.
- g Support, encourage and promote the continued development of the agricultural sector within the Spatial Plan Area. This should entail actions to directly support agriculture as a specific activity and an important source of jobs and income in many of the more remote parts of the Spatial Plan Area. In addition, the continued development and expansion of associated (linked) activities should be supported through appropriate planning policies, business and marketing support and strategies and, as appropriate, direct funding and investment opportunities.
- h Recognising that many businesses within Pembrokeshire – The Haven are very small, consideration should also be given to the ways in which business activity might be promoted outside of the main centres. This will be important in strengthening the economic roles of Key Settlements and Local Centres outside of the Haven Towns Hub and the Carmarthen Hub and will thereby contribute towards an overall strengthening of the Spatial Plan Area as an economic centre. Although it would not necessarily be appropriate to allocate land for employment development in smaller locations (due to uncertainty regarding the market attractiveness and hence, the deliverability of any such allocations), achieving this enhancement will include establishing policies that support the (windfall) development of small scale employment premises in appropriate locations and that also encourage working from home – either by way of traditional home working or through the promotion of the development of live-work units as a specific form of accommodation that would facilitate this type of activity – as a basis by which sufficient capacity might be achieved. Again, the enhancement of broadband internet connections will be important in this regard.
- i Actively lobby the Welsh Assembly Government and the national government regarding the role of the Spatial Plan Area as suitable location for the decentralisation of government services. As part of this process, it will be important to identify key locations that are considered most suitable for such activities (initially, this will be focused upon Carmarthen and Haverfordwest and possibly also Pembroke Dock) and provide a clear rationale for investment in the area – setting out the strengths of the Spatial Plan Area and the towns that would support this type of public sector activity.
- j Connections should also be developed with the adjoining Spatial Plan Areas, again in order to share experiences and examples of good practice.

This approach would also facilitate the development of a wider West and Mid Wales economic partnership which could promote the area throughout Wales and the UK as an attractive, vibrant and sustainable business location.

- k Enhance physical and IT connections to the main employment locations. At present, there is a good broadband service available in each of the main settlements although BT is the only provider and the bandwidth is limited. Working with BT and potential other providers to enhance this provision will be important in helping to improve connectivity in the Spatial Plan Area and its profile as a business location.
- l Training to encourage key skills and the development of business support and links will be important to help sustain activity within the area. The establishment of a business mentoring scheme might provide a basis by which experience and good practice might be shared and might thereby strengthen local businesses and the well-being of the overall economy.
- m In considering employment and the local economy within the Spatial Plan Area, it is important to recognise the importance of non-B class jobs and activities. A 'whole economy' approach recognises the importance of all sectors and seeks to encourage their continued development and enhancement. The implication of this would be to improve the strength and diversity of the local economy and to promote all sectors, including those that have not traditionally been viewed as 'employment land' (i.e. B Class) sectors. In the Pembrokeshire – The Haven Spatial Plan Area, particular regard should be given to tourism, agriculture and public services as part of the whole economy approach.

5.7 In respect of all of these activities, it will be important to draw upon the existing strategies for economic development within Wales and enhance links with universities and businesses within the Spatial Plan Area and elsewhere. A firm policy steer should be provided in respect of the enhancement of settlements, the promotion of appropriate new economic and employment opportunities and the protection of employment locations against the loss of facilities and floorspace.

Tourism

5.8 As has been shown in the preceding chapters, future complementarity in respect of tourism will be focused upon the continued key role of the Coastal Corridor and the tourism hub of Tenby and Saundersfoot. However, this important area will be complemented by the other settlements within the Spatial Plan Area which are to perform a stronger tourism role in the future. Whilst some settlements outside of the Coastal Corridor such as Narberth, St Davids and some rural centres have already developed a substantial tourism role, the vision for complementarity will rely upon an increased tourism role being performed by a larger number of centres, including the hub settlements and rural centres. The key changes that will be important in facilitating the

development of the tourism economy and complementarity between the settlements include:

- a Recognise the role of the environment as a facilitator for and a constraint to growth within the tourism sector.
- b Continue to develop the Coastal Corridor as the main focus for tourism within the Spatial Plan Area, based upon the quality of the natural environment (countryside and coastline), ensuring that further development and increased tourism activities is not detrimental to this central attraction. As part of this, Pembroke should continue to be promoted and should be included within a slightly expanded Coastal Corridor, in order to reflect its role as a tourism centre and to broaden the range of opportunities that are available to visitors within this important corridor.
- c Continue to promote inland tourism as well as coastal opportunities in order to support the diversity of the Spatial Plan Area's tourism offer and to ensure that the substantial range of facilities that are available away from the coastal zone are recognised by visitors.
- d Develop additional outdoor focused activities such as walking, mountain biking, horse riding, activity centre events as well as water and coastal based activities such as sailing, dolphin watching and scenic coastal boat trips.
- e Build upon the heritage assets that exist within the Spatial Plan Area to develop opportunities for heritage tourism.
- f Promote a range of additional indoor facilities and attractions that are suitable during periods of bad weather and in the shoulder and off-peak seasons – this might build upon the heritage tourism potential and include the development of museums and interpretation centres such as the Hywel Dda Centre in Whitland. It might also link in with the enhancement of the leisure offer within key settlements.
- g Undertake an updated accommodation study in order to consider key trends and requirements. Work with operators to enhance the quality of accommodation, focusing upon the type, location and price of provision so as to meet the various needs of different types of visitors.
- h Develop a strategy for the improvement of the Primary Key Settlements and hub centres as tourism destinations. This should initially focus upon the potential role of Haverfordwest and Pembroke Dock within the Haven Towns Hub (which is very accessible from the Coastal Corridor) and also Carmarthen so that it is viewed to be sufficiently attractive to draw holidaymakers back from the resorts further west or into the Spatial Plan Area from other locations to the east. The strategies should draw upon the strengths and opportunities that each of the larger settlements presently

have and which might be used to promote their development as tourist centres. Particular consideration in this regard should be given to the potential cross-relationship between their future tourism role and their existing and anticipated retail and leisure functions and their heritage or harbour offer (as appropriate). In establishing tourism development strategies, it will be important to recognise that the role of the different Primary Key Settlements is likely to vary, depending upon their size, location, character and primary functions.

- i In addition to promoting the main centres as tourism centres, a strategy for the promotion of rural tourism throughout the Spatial Plan Area should also be established. This should consider the opportunities that exist in the different parts of the area, drawing upon examples of best practice within Pembrokeshire – The Haven and elsewhere. The strategy should seek to identify the opportunities that might arise from agricultural diversification projects and should recognise the important contribution that individual projects might make to the local community and the overall tourism sector within the Spatial Plan Area. It should recognise and draw upon the successes that have been seen in a number of small settlements throughout the Spatial Plan Area and should consider how these case study examples might be used to stimulate growth and activity elsewhere.
- j Consideration should be given to the ways in which the benefits associated with the gateway role of the port locations within the Spatial Plan Area might be increased. These centres should be promoted as offering opportunities for tourists that are passing through the ports rather than just as places to pass through en-route to the Republic of Ireland. The promotion of high quality accommodation, food and drink establishments and other facilities close to the port will be important in achieving this role.
- k Provide funding and business support opportunities for existing tourism operators and to encourage potential new tourism facilities and developments.
- l Encourage additional marketing and cross-marketing of facilities in order to increase the number of tourists that visit a wider range of local attractions whilst on holiday.
- m Work with tourism bodies and operators to consider the potential for specific events and festivals to be held in different settlements (e.g. a food and drink festival, cultural shows, heritage festivals, music and theatre events, literary festivals, Eisteddfod events or regattas in the harbour locations. These would be important in helping to raise the profile of the area as having a broad tourism base and attracting visitors into the Spatial Plan Area.

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- n Ensure high quality transport infrastructure and connections between key tourism centres and attractions to make it easier for holiday makers to combine trips to different locations.

5.9 The key focus in respect of activities should be upon increasing the value of tourism throughout the Spatial Plan Area. In this regard, the quality of provision should be a particular consideration so that Pembrokeshire – The Haven might be recognised as an attractive and diverse location for a wide range of tourism activities throughout the year. These changes should all be supported by the establishment of clear policy support in respect of the enhancement of settlements, the promotion of appropriate new tourism opportunities and the protection of tourism centres against the loss of facilities and provision.

Retail

5.10 In the case of retail, there is much that needs to be done to achieve complementarity within the Spatial Plan Area. However, as a starting point, it is recommended that further research be undertaken in Pembrokeshire (inclusive of the National Park) in order to gain a better understanding of retail need and capacity within this area. However, on the basis of existing data, the key changes seen as important in facilitating change in the existing role of centres are as follows:

- a Haverfordwest requires regeneration in order to help attract investment into the town centre. There is particular concern that the leakage of retail expenditure to the east will increase with the opening of St Catherine's Walk. As such, further work should be undertaken as to how Haverfordwest could improve its retail offer in the context of its existing physical constraints. This might include physical improvements to the public realm, the attraction of a wider range of new retailers into the town and the development of slightly larger retail units where possible and appropriate.
- b Promote the development of the permitted foodstore within Fishguard in order to better meet the needs of the local population and promote sustainable shopping patterns. Fishguard also requires substantial investment in its comparison retail offer to make it more attractive as a retail centre. Currently a substantial percentage of residents are travelling to Haverfordwest to undertake both convenience and comparison shopping. Whilst the convenience need can easily be met through the provision of a large foodstore, comparison retail is harder to attract into a centre. It is considered that a foodstore will promote spin-off benefits which may improve comparison retail. However, additional work is required in order to establish a plan for Fishguard's retailing future.
- c Milford Haven is struggling as a centre with a poor quality retail offer. Certain policy decisions need to be made with regards to the town's future as a retail centre as it continues to struggle. It is considered that its future role will be as a small scale town centre which is complementary to the more successful centres of Haverfordwest and Pembroke Dock. A key

problem in Milford Haven is the distance between the existing town centre (traditionally concentrated at Charles Street and Robert Street), the Havens Head Retail Park and the marina. However, plans are being discussed to reduce the area of the town centre and it is considered that if this can be done in a way in which better linkages to the Havens Head Retail Park can be promoted this would significantly improve the centre's viability. However, the centre is always going to face problems with the river, road and rail network effectively dividing the two elements of the centre. The key focus within Milford Haven must be to increase the quality of the local offer within the context of a more limited range and scale of provision. This would provide a basis by which it might become more attractive and viable as a smaller scale centre. Establishing a firm policy focus in respect of the future role of the town and identifying clear plans for its physical enhancement will be particularly important in this regard.

- d All the main centres within the Spatial Plan Area could benefit from improvements although as investment in retail largely comes from the private sector it is only really possible to identify development sites, improve the appearance of the public realm, organise markets/events and highlight vacant units to retailers with an interest in gaining representation within the centre. There may also be merit in appointing town centre managers for those key retail centres that do not presently have such input.
- e The most successful local centres within the Spatial Plan Area are those which are better able to meet local need such as Narberth, Newcastle Emlyn and St Davids. Also, in the cases of Narberth and St Davids, niche retailing has developed in the town centres making them appealing to both visitors and residents. Whilst it is accepted that some centres will always be stronger than others, certain improvements can be made to these centres to make them more attractive to retailers. Furthermore, these centres are more attractive to independent rather than multiple retailers and as such there may be some opportunity to better promote opportunities, such as vacant units, to local business operators. However, ultimately, the local function of these centres should be protected and their individuality and unique selling points should be identified, preserved and enhanced.
- f Recognising the important role of local settlements in complementing the main centres, it will be important to establish a strategy for their individual enhancement. Undertaking local "village studies" to establish the specific opportunities for development and enhancement within the smaller settlements will be important in this regard. They will provide the basis for a clear strategy for on-going investment and enhancement so as to ensure that efforts to improve the complementarity of retail centres can be both top down (i.e. through the enhancement of the key retail centres) and bottom up (i.e. through the enhancement of local centres and villages).

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- 5.11 These changes should all be supported by the establishment of clear policy support in respect of the enhancement of settlements, the promotion of appropriate new retail opportunities and the protection of retail centres against the inappropriate loss of facilities and provision.

Leisure

- 5.12 The evidence report has highlighted that there is a need to enhance the provision of a number of the leisure facilities within the Spatial Plan Area and specifically towards the north. In terms of complementarity, the key aim is to ensure that facilities are accessible to all residents whilst still remaining financially viable. A balance clearly needs to be struck between this and also between the acknowledged imbalance in provision – whilst there might be a limited overall quantitative need for leisure facilities across the Spatial Plan Area as a whole, a relative shortage in provision at a more localised scale points towards a qualitative need for enhancement. This raises implications for the achievement of future complementarity and the way in which the role of different settlements as leisure centres might be enhanced. The following actions have the potential to improve complementarity within the Spatial Plan Area.
- a No comprehensive research has been undertaken in terms of leisure usage and need within the Spatial Plan Area and as such it is considered that a leisure survey should be undertaken in order to determine existing usage, the capacity of existing facilities and the needs and wants of residents. Furthermore, although residents are clearly the main priority, with the considerable increase in population over the summer months, there would be merit in extending the survey to tourists to see what their usage of the areas leisure facilities are during their stay e.g. cinema, bowling etc and also what facilities would further enhance their stay. The survey will also inform an understanding of the most appropriate locations for new facilities. The purpose of this would be to provide a more detailed appreciation of the level of and type of need for additional leisure facilities. It should take a similar form to the retail household survey and would provide clarity for the local planning authorities regarding the need to allocate land and adopt a flexible position in respect of proposals for such forms of development.
 - b The potential for additional leisure facilities in Carmarthen should be reviewed, building upon the substantial benefits that are related to the emerging St Catherine's Walk scheme. This should include ascertaining key forms of leisure provision for which there might be a local demand, identifying suitable land for new development and working with private sector operators in order to bring forward the types of additional provision that would be beneficial to the town in the longer term.
 - c The Fishguard Hub is currently considered to be underserved in terms of having reasonable accessibility to a number of leisure facilities and as such is not serving a complementary role to the other hubs or settlements. The

need for specific facilities has been investigated within the evidence report and is detailed in Chapter 3 above. However, in terms of moving forward it is considered necessary for potential sites to be identified for leisure uses within this hub and further investigation should be undertaken to ascertain which leisure operators would be interested in gaining representation within the area.

- d The potential development of the South Quay in Pembroke as well as the Martello Quays development in Pembroke Dock are seen as real opportunities to create a 'leisure hub' in this part of the Spatial Plan Area. It is thereby considered important that these two opportunities are developed in a complementary way to ensure the maximum benefits for the local population and visitors are reaped.
- e The Spatial Plan Area has a number of natural assets, making it a unique leisure destination. In particular the water is a real selling point which should be taken advantage of with high quality marina developments with opportunities for day and night time leisure opportunities and water sports provision. There are existing plans in Pembroke Dock for a new marina. However, there is potential for such developments in other settlements, particularly Fishguard (where a feasibility study relating to port improvements and a new marina has been undertaken) which could have real benefits for the Spatial Plan Area.
- f In delivering improvements in respect of leisure provision, careful consideration should also be given to the potential relationships with the tourism sector and the extent to which holidaymakers will rely upon the local leisure offer. This important component of demand should form a central element of the assessment of the likely need for new facilities.

5.13 These changes should all be supported by the establishment of clear policy support in respect of the enhancement of settlements, the promotion of appropriate new leisure opportunities and the protection of centres against the inappropriate loss of facilities and provision.

Public Services

5.14 The mechanism of delivery for schools, health facilities and emergency services is different to that for retail, leisure or employment opportunities. This will have a major bearing both upon the potential for the development of complementary relationships within the Spatial Plan Area. The following key proposals are recommended as a basis by which public services might be delivered in a more efficient, equitable, sustainable and complementary manner:

- a Recognising that self-containment in respect of public sector service provision is not possible at every settlement level in the Spatial Plan Area, the priority should be upon maximising service provision in terms of the quality of distribution and the range of provision. In this context,

consideration should be given to the accessibility (in respect of travel times) to public services so that they might be distributed in a manner that best serves the whole population within the Spatial Plan Area and contributes towards an improvement in the quality of life for all service users.

- b Detailed additional research should be undertaken in respect of specific uses, capacities, level of service provision and the viability of enhancement should be undertaken in order to inform necessary policy decisions regarding the enhancement of provision.
- c In undertaking this research, the key focus should be upon travel times to facilities – this will require consideration of distribution and transport infrastructure and services so that people can get to services quickly and easily and emergency services can respond within required times. However, this assessment should be based upon an appreciation of the reality of a large rural area within which the delivery of essential public services can be the subject of particular challenges.
- d Drawing upon existing information relating to school capacity, places and locations, consider long term options regarding the need for additional schools, the expansion of existing schools and (if necessary), the rationalisation of existing provision in order to ensure a more efficient and equitable level of provision within the context of an overall improvement in service delivery.
- e Work with the primary health providers to facilitate an improvement in GP provision and particularly in supply of the number of NHS dentists so that additional provision can be targeted into key areas of need and the current shortage can therefore be addressed.
- f Work with providers to expand the range of services offered by pharmacies. This will be particularly important in the areas that are less well served by other medical services.
- g Review and appraise the potential to enhance and expand the co-responder scheme in order to improve the coverage of emergency services within peripheral areas.

Transport

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As has been shown, an efficient transport system within the Spatial Plan Area is crucial to the achievement of more complementary relationships between settlements. Recognising the accessibility challenges that are inherent within this large rural area, it is crucial that a high quality system can be provided so as to maximise the accessibility of settlements, services and facilities to all members of the local community. The Provisional Regional Transport Plan for South West Wales contains a large number of proposed actions and approaches that are designed to achieve the vision for improved transport and access within and beyond the region to facilitate economic development and

the development and use of more sustainable and healthier modes of transport. It is considered that the recommendations contained within the RTP will be important in encouraging better connections within the Spatial Plan Area and thereby contributing towards the achievement of complementarity.

5.16 The recommendations set out in the RTP are advocated and would be consistent with the objective of and vision for complementarity. In particular, it is considered that the following actions would be particularly important in this respect:

- a Improving the reliability of highway, rail and bus connections between settlements;
- b Improvements in the quality, speed, frequency and coverage of public transport connections;
- c Enhance the quality, accessibility and attractiveness of interchange facilities in order to increase the potential for modal shifts and the use of a more sustainable range of different modes of transport;
- d Implementation of initiatives to improve the efficiency of the highway network including traffic management programmes and the management of car parking in key settlements; and,
- e Improvements in the level and availability of information regarding the availability of different forms of transport.

5.17 The key objective in respect of transportation improvements should be to contribute towards a greater level of complementarity by implementing measures that will improve journey times, offer an improvement in the quality of routes and contribute towards more frequent and better quality public transport services. Such actions be important in helping to people to take advantage of the complementary roles of different settlements and would, in themselves, serve to offer an improved level of complementarity within the Spatial Plan Area.

5.18 In seeking to deliver transportation improvements and to achieve the vision contained within the RTP, it will be important to assess the implications of the proposed complementary recommendations upon transportation and the ability of planned transport measures to contribute towards increased levels of complementarity. In so doing, it will be important to recognise that the changing roles that are likely to be associated with the achievement of increased levels of complementarity may result in more localised congestion. This matter will need to be addressed at each spatial level and measures should be implemented to ensure that any such problems might be identified and addressed.

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In addition to the actions contained in the RTP, we would make the following recommendations:

- a Appraise the energy and carbon use implications of the recommended proposed actions and the associated transport measures in order to identify the possible environmental implications of a complementary strategy and to inform a strategy for the reduction of any such environmental downsides.
- b Identify the means by which transport access can be enhanced for users of the ports and heavy industrial plants within the Spatial Plan Area so that adequate access can be achieved to these facilities without having an adverse impact upon other road users.
- c Review the implications of the toll charges on the Cleddau Bridge and appraise the possible implications of changes in respect of complementarity between the towns within the south and the north of the Haven Towns Hub, congestion levels and the resultant financial implications for Pembrokeshire County Council.
- d Undertake a detailed review of the operation of the community transport services in terms of its costs, levels of patronage, income, viability and area of service coverage. Consideration should then be given to the potential feasibility of enhancing this system to cover a wider part of the Spatial Plan Area.
- e As part of the community transport review, appraise options for a taxi-bus system whereby people telephone for a bus which will collect them from designated points. This offers considerable cost and delivery advantages above a conventional bus service although also has potential difficulties regarding the unpredictability of journey times. However, it is recognised that it can be more costly than larger scale public transport provision and that this can raise viability concerns. Consideration might be given to undertaking a small-scale pilot exercise in order to appraise the long term feasibility of this type of service.

5.20

These improvements should all be oriented towards enhancing the overall pattern of accessibility for all throughout the Spatial Plan Area. As such they should be focused upon enhancing the complementarity of settlements across Pembrokeshire – The Haven. Recognising the challenges of accessibility in such a rural area, the improvements should therefore be carefully targeted in a manner that helps to maximise physical complementarity. The following conclusions should serve as a starting point for further analysis:

- a By virtue of its geographical location and role as a transport hub, Haverfordwest is the best linked to other centres by road and public transport;

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- b The accessibility of the other Haven Towns by road is broadly similar although by public transport, Pembroke Dock enjoys better accessibility than Milford Haven;
 - c The location of Carmarthen to the east of the Spatial Plan Area, some distance from the Haven Towns Hub means that travel times from the town are greater to other parts of the Spatial Plan Area but the town is nearer to the larger centres outside of the Spatial Plan Area;
 - d Fishguard is the least accessible of the hubs with greater journey times by road and public transport to the other hub settlements and fewer public transport services; and,
 - e Accessibility to and from the non-hub settlements varies considerably across the Spatial Plan Area, depending upon its location, relationship to the nearest hub settlements and the availability of existing road and rail infrastructure.

5.21 In reviewing the options for transport enhancements, particular consideration should be given to the importance of meeting the accessibility needs of different groups and of, as far as possible, maximising the level of accessibility that is possible at different times of the day and the week.

5.22 In addition, a review of the coverage and quality of broadband internet services should also inform discussions with service providers regarding the possible improvements that might be made in order to reduce problems associated with virtual peripherality and thereby help to further increase complementary relationships.

Conclusion

5.23 The recommendations set out above provide the basis by which the vision for complementarity and the wider vision for the Spatial Plan Area might be achieved. They are all directed towards improving the provision of key services and enabling each settlement and hub to achieve its full potential in a manner that is complementary with the role of adjoining centres. Delivering the recommended will necessitate input from the Welsh Assembly Government, Carmarthenshire County Council, Pembrokeshire County Council, Pembrokeshire Coastal National Park Authority, the private sector and other service providers and stakeholders. A co-ordinated approach will be vital to ensuring that complementarity can be achieved and, to this end, buy-in from each of these important organisations in respect of the overall strategy and individual actions will be important.

5.24 As part of our recommendations, we have advised that various additional work should be undertaken in order to provide a clearer and more detailed basis for on-going improvements. However, in undertaking these additional studies, it is particularly important to recognise the level of work that has already been undertaken, including specific regeneration studies and other settlement

specific work. In a number of cases, the recommendations from these reports have not yet been implemented and consideration should be given as to why this is the case. At this time, it will be important to appraise whether the recommendations of these previous strategies accords with the new vision for complementarity and hence, whether their future implementation would contribute towards the achievement of a Spatial Plan Area within which facilities and services are more appropriately and sustainably provided and within which all settlements are able to fulfil their potential.

5.25

The actions and policy recommendations set out in this chapter take a number of forms but are all considered to be readily deliverable and capable of being mutually beneficial to the Spatial Plan Area. Subject to an understanding of how best to overcome the identified barriers to complementarity and using the current LDP processes as a key stepping stone to progress, it is considered that the recommendations can be taken as a firm basis for progress and enhancement.

6.0 **Complementarity with adjoining Spatial Plan Areas**

6.1 The focus of this study is to appraise the level of complementarity between the settlements and hubs within the Spatial Plan Area. It is important that the Pembroke – The Haven Spatial Plan Area is not viewed in isolation as the boundaries dividing the various areas are largely arbitrary with some inevitable overlap. This means that in addition to considering relationships within the area, it is also important to understand the ways in which it is complementary in terms of its roles and functions with the adjoining Central Wales and Swansea Bay Spatial Plan Areas and with the Republic of Ireland.

With Swansea Bay

6.2 Located to the east of Pembrokeshire – The Haven, the Swansea Bay – Waterfront and Western Valleys Spatial Plan Area incorporates a number of settlements including Swansea, Port Talbot, Llanelli, Cross Hands, Ammanford, Neath and Pontardawe. This Spatial Plan Area has the ability to both complement and compete with Pembrokeshire – The Haven. As such there is a clear need to strengthen Pembrokeshire – The Haven in order to maximise the benefits of being located so close to this Spatial Plan Area whilst preventing an unacceptable level of outflow of jobs, people, skills and investment to the east. The possible benefits that might arise from collaborative working with this Spatial Plan Area are considerable and include:

- a The attraction of employment and investment;
- b The development of closer links with companies, universities and other organisations in the Swansea Bay area;
- c The attraction of retail and leisure expenditure from residents within the Swansea Bay area; and,
- d The attraction of tourist activity.

6.3 Due to its location, Carmarthen is considered to be a cross-boundary settlement and consequently provides the best opportunity for promoting connectivity between these two Spatial Plan Areas. In many ways Carmarthen is already fulfilling this role by providing an alternative ‘main centre’ to the larger centres located to the east such as Llanelli, Port Talbot and Swansea. This is particularly evident in terms of retail with Carmarthen effectively acting as a buffer, preventing a high level of leakage to these larger centres. However, whilst some leakage to Swansea is expected and is considered to be acceptable, there is still much improvement which could be made in Pembrokeshire – The Haven in respect of its retail and leisure offer to ensure it stays competitive and attractive in comparison to these larger centres.

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- 6.4 Carmarthen is identified within the Spatial Plan as a Knowledge Economy Centre forming part of the wider Spatial Plan network of knowledge economy sectors. This creates considerable opportunities for development. The capacity for future growth within the Spatial Plan Area should be considered and provided for as part of the process. This should consider the balance of development across the County and should ensure that a shortage of development land in Carmarthen does not result in a loss of potential investment to Swansea Bay. Rather, a balanced supply of land should provide a basis for an efficient and sustainable local economy in the County, the Spatial Plan Area and the wider area.
- 6.5 In addition, the development of the Technium in Pembroke Dock provides a further opportunity to develop connections between Pembroke – The Haven and Swansea Bay in order to further develop and strengthen the knowledge based economy within west Wales as a whole.
- 6.6 In summary, it will be important to develop links between Swansea Bay and Pembrokeshire – The Haven in order to build upon their profile and image and make them more complementary. This will further strengthen the economic position of west Wales. The preparation of a joint action plan would be particularly helpful in achieving the aim of shared and sustainable growth. This should focus upon the ways in which lessons and experiences might be shared and a joint policy platform and investment prospectus might be offered in the form of identified land, sites and premises, training opportunities, business support and financial backing.
- 6.7 Within the Pembrokeshire – The Haven Spatial Plan Area, there is a clear need to deliver improvements in respect of the retail and leisure offer and the availability of employment land in order to ensure that it will be less vulnerable to competition from the larger centres to the east and thereby to help it develop a more complementary and positive relationship that deliver the benefits detailed above.

With Central Wales

- 6.8 The Central Wales Spatial Plan Area is located towards the north and east of Pembrokeshire – The Haven and covers a large area. It faces similar issues to that of Pembrokeshire – The Haven with familiar problems such as peripherality, rurality and population sparsity. Each of these issues has implications upon the role of the different settlements within each Spatial Plan Area.
- 6.9 There are numerous settlements within the Central Wales Spatial Plan Area including Aberystwyth, Newtown, Welshpool, Llandrindod Wells, Cardigan, Denbigh and Hay-on-Wye. Due to the way in which the areas have been defined there is a certain amount of overlap between Central Wales and the adjoining areas. Specifically, Carmarthen and Newcastle Emlyn form a gateway between Pembrokeshire – The Haven and Central Wales and as such can be considered

the most important centres in promoting connectivity between these two areas. In particular, the southern area of Central Wales is largely served by Pembrokeshire – The Haven whilst Cardigan is also considered important for those living in north Pembrokeshire.

- 6.10 Given the similarities that exist between the two Spatial Plan Areas and the broad similarities in the visions for each area, efforts should be made to share experiences and examples of best practice in respect of the development of economic sectors, the provision of services and functions and the enhancement of settlements. In addition, further opportunities for cross-boundary service provision should be considered as a basis by which the needs of local communities might be enhanced and the vitality of the economy in this part of west Wales might be promoted.

With Republic of Ireland

- 6.11 Although the Republic of Ireland is not within Wales and is not a Spatial Plan Area, it is helpful to consider the connections with it. It takes approximately 3.5 hours to get from Fishguard to Rosslare and 3.75 hours to get from Pembroke Dock to Rosslare by ferry. Therefore, the links via the ports for both passenger ferries and freight are important considerations when assessing the wider complementarity of the region.
- 6.12 Specifically, the ports might have the potential to be enhanced in terms of their passenger and freight capacity in order to further support the attractiveness of the Spatial Plan Area as a gateway. Even if it is not possible to substantially increase capacity, their promotion would be important in helping to foster improved linkages. This could have knock on benefits to other sectors within Pembrokeshire – The Haven such as tourism and the energy economy. The opportunity to use the improved strength and capacity of the ports to increase the level of water-based (rather than air-based) transport between the UK and the Republic of Ireland should be exploited. This would offer a substantial boost for the Spatial Plan Area by increasing the flow of activity and raising its profile as a major gateway into the UK. Increasing the level of water-based transport in preference to air travel would also offer sustainability benefits.
- 6.13 It is recommended that further investigation should be undertaken to establish what could facilitate the development of closer ties between the Republic of Ireland and Pembrokeshire and to thoroughly assess the potential benefits associated with these closer ties. In addition to reviewing the role of the ports, this might include negotiations between the Welsh Assembly Government and the Irish Government to consider how increased trade between the Pembrokeshire – The Haven Spatial Plan Area and the Republic of Ireland might help to enhance the Welsh and the Irish economies in a mutually supportive manner.

7.0

Conclusion

7.1

This study has been commissioned by the Welsh Assembly Government in conjunction with Carmarthenshire County Council, Pembrokeshire County Council and Pembrokeshire Coastal National Park Authority. Its purpose is to consider the existing role and function of, and the relationship between the hubs and settlements within the Spatial Plan Area and to advise on the ways in which these might be enhanced. As such, it is intended to provide a platform for the consideration of the future enhancement of settlements and hubs within the Spatial Plan Area and the delivery of the vision for the area, as identified in the Wales Spatial Plan.

7.2

The need for this study is rooted in an understanding of the current context of the area as a large, rural region within which all settlements are limited in size and many centres are being relied upon to perform a role that would normally be associated with much larger towns. In this context, it is important to ensure that local communities are adequately served in terms of employment, retail, leisure and public service facilities and that, given the popularity of the area as a holiday destination, the needs of tourists can similarly be accommodated. A failure to meet these needs would result in the loss of expenditure and investment to the adjoining Spatial Plan Areas and an inability to deliver or maintain strong and sustainable communities within area. However, the achievement of these objectives must also fit within the context of the environmental quality of the Spatial Plan Area so that the need for growth does not undermine the fundamental appeal and character of the region.

7.3

It is recognised that no settlement exists in isolation but rather that they all exist within the context of a defined network and hierarchy of other centres. Within the Pembrokeshire – The Haven Spatial Plan Area, complementarity means that all settlements can work together in a mutually beneficial manner that acknowledges their different roles and functions but also encourages their ability to contribute towards the well-being of each other and of the area as a whole. In brief, it is about focusing activities in those centres within which they are most likely to be sustained and in encouraging all settlements to perform their full potential, either as a key focus for employment, retail or leisure activity or as a local centre which supports the higher-order locations. The implications of this vision include:

- a Ensuring an adequate supply of quality housing;
- b Providing high quality local retail and leisure facilities together with easy access to a network of larger centres that can provide a wider range of facilities and opportunities;
- c Establishing a sustainable and diverse economic base wherein an appropriate supply of jobs are available and can contribute towards the economic viability of the Spatial Plan Area as a whole;

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- d Maximising the tourism opportunities that exist throughout the Spatial Plan Area;
 - e Ensuring that public services are appropriately distributed within those areas where they can best serve the needs of the local population;
 - f Providing an adequate transportation network that enables people to access those services that are not directly available within their local settlement in an efficient and equitable manner;
 - g Reducing the need to travel, particularly for lower order functions, thereby helping to achieve a more sustainable pattern of use of natural resources; and,
 - h Ensuring a balance between the provision and distribution of facilities and services and the protection and enhancement of the natural environment.

7.4 The accompanying evidence report considers the ways in which the settlements relate to one another at present whilst this report has identified the future relationships in respect of the way in which services are to be delivered and the key role of the main settlements. In so doing it highlights that, in spite of differences in the roles of and relationships between settlements and, regardless of their size or status, all centres within the Spatial Plan Area are linked together and that complementarity between the settlements and service topics is vital to the well-being of every centre. At present, this role is not being performed as well as it might and so development and regeneration, change and progress is required in every settlement and in respect of the delivery of every service topic.

7.5 Despite the need for change throughout the Spatial Plan Area, it is not expected that the future broad pattern of relationships will vary considerably from the existing structure. The main settlements will continue to serve the most dominant role and will continue to be supported by smaller centres. The development of complementarity will represent a long term and on-going process for which there can be no defined end point. However, through the enhancement of ties between the public and private sectors and the continual delivery of projects and policies, clear progress can be achieved and can lead towards the delivery of the vision for complementarity and a more attractive, sustainable and robust Spatial Plan Area.

7.6 In this regard, it is possible to identify the following settlement hierarchy and main settlement hubs that will stem from the enhanced complementary relationships:

Tier	Towns within Tier
1: Regional / Sub-regional Settlements	Carmarthen Haverfordwest
2: Key Settlements	Milford Haven – Neyland (linked settlement) Pembroke Dock – Pembroke (linked settlement)
3: Settlements serving more than a local role	Fishguard – Goodwick (linked settlement) Narberth St Davids Tenby – Saundersfoot (linked settlement)
4: Local Centres	Crymych Kilgetty Laugharne Letterston Newcastle Emlyn Newport Pendine St Clears Whitland

Table 3 Future Settlement Hierarchy within Pembrokeshire - The Haven Spatial Plan Area

Hub	Settlements within Hub	Key Hub Functions
Carmarthen	Carmarthen	Population / Housing Employment Retail Leisure Public Sector Tourism
Haven Towns	Haverfordwest Milford Haven – Neyland Pembroke Dock – Pembroke	Population / Housing Employment Retail Leisure Public Sector Tourism
Fishguard	Fishguard Goodwick	Gateway Tourism
Tourism	Tenby Saundersfoot	Tourism

Table 4 Role and definition of hubs within Pembrokeshire - The Haven Spatial Plan Area

- 7.7 The roles and functions of these hubs will provide the basis for complementarity with other settlements at each level of the settlement hierarchy and, as such, will provide a foundation for the strengthening of all settlements within the Spatial Plan Area and the achievement of the vision for stronger settlements, a more robust economy and better served communities.
- 7.8 Although the future settlement hierarchy will be similar to the existing structure in terms of its broad pattern, the vision is for an improvement in the distribution of services and an enhanced strength of the centres as well as in the physical and functional relationships between the centres. The potential difficulties in delivering this change should not be underestimated, particularly given the current economic context. Key challenges exist in respect of the viability and delivery of options, the prospects for the necessary investment, and the policy choices that are required.
- 7.9 Delivering the changes that are required cannot be confined to the remit of the planning system as it has much broader ramifications and should incorporate all local authority and Welsh Assembly Government departments, together with other relevant public sector bodies and the private sector. The vision for

complementarity should form a key component of forthcoming community strategies, regeneration proposals and development plans. It is recommended that the following key policy considerations should be explored:

- a That Carmarthen and Haverfordwest will be the initial focus for action for the development of the commercial sectors with spin-offs following to the benefit of smaller settlements and the economic well-being of the Spatial Plan Area more generally;
- b That, as the largest settlement and the only regional centre within the Spatial Plan Area, the greater potential for growth in Carmarthen should be recognised as a means to attract additional investment and growth within Pembrokeshire – The Haven and to reduce leakage to Swansea and elsewhere. However, this should not be at the expense of the complementary relationships that exist between the towns and so enhancements within Haverfordwest should be delivered in order to maintain its status as the second largest settlement within the area;
- c That Milford Haven and Pembroke Dock should be promoted further as key energy sector centres and that such heavier forms of industry should be concentrated into this part of the Haven Towns Hub;
- d That Milford Haven should be permitted to contract in respect of its retail function to focus upon serving the convenience retail needs of the population living in the town, with comparison requirements and the needs of the surrounding communities being primarily served by a strengthened Haverfordwest and Pembroke Dock. However, within the context of a reduced retail function, Milford Haven should be enhanced and regenerated so that it can be viewed as a strong and attractive local centre by those that live and work in the town;
- e That the Fishguard Hub will, in reality, not serve the same role as the Haven Towns or the Carmarthen Hubs but that it will have a different focus as a gateway hub and as a local centre;
- f That Tenby and Saundersfoot will form a tourism hub within the heart of the Coastal Corridor and that, although improvements should be sought in their offer, the main Spatial Plan hubs will not be the primary centres for tourism activity but would rather complement the Coastal Corridor area;
- g That those local centres with an identified niche focus should be allowed to develop in a manner that is complementary to the role of the main settlements and that brings benefit and diversity to the Spatial Plan Area as a whole. These and other settlements that are identified as having opportunities for further niche activities should be encouraged to fulfil their potential;

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- h That the other local centres throughout the Spatial Plan Area will not be the main focus for retail, leisure or employment investment but that small-scale services and facilities will be encouraged and promoted so that they might perform their full potential and be viewed as attractive locations by the local communities;
 - i That improvements to the local provision of infrastructure might enhance the ease with which people are able to access services, regardless of where they might live and work
 - j That the needs for development might be balanced against the importance of protecting the very high quality environment that serves as key attractor of the Spatial Plan Area; and,
 - k That that Wales Spatial Plan vision for the area and the vision for complementarity might form the basis for development of strategic and site-specific LDP policies and proposals.

7.10

These policy choices draw together an understanding of the key roles of the settlements, the way in which the key sectors would be delivered and the key actions that are required to help achieve the change that is being sought by the Wales Spatial Plan. Each of these elements take account of the considerable opportunities and benefits that exist throughout the Spatial Plan Area and the potential for the achievement of *“a network of strong communities supported by a robust, sustainable, diverse high value-added economy underpinned by the Area’s unique environment, maritime access and internationally important energy and tourism opportunities.”*