

Pembrokeshire Regeneration Masterplan 2008/2013

The Framework

June 2008

**Welsh Assembly Government
Department for Economy &
Transport**

**Pembrokeshire County
Council**

**Pembrokeshire Coast
National Park Authority**

**Milford Haven Port
Authority**

Pembrokeshire College

OVERVIEW

This document sets out the agreed and negotiated framework for Regeneration activity in the County of Pembrokeshire by the Welsh Assembly Government's Department of Economy and Transport and the Pembrokeshire County Council over the next five years.

It describes how the projects fit with the Wales Spatial Plan and other strategies and policies and provides a tool for working with the private sector and other key stakeholders, in particular but not exclusively, the Pembrokeshire Coast National Park Authority and the Milford Haven Port Authority.

Section 4 develops the Spatial Plan vision for the Pembrokeshire Haven's key settlements setting out in more detail the separate role and functions of the key settlements as described in the Spatial Plan.

For each settlement area in Section 5 it identifies key weaknesses, opportunities and issues that need to be resolved so as to achieve the Spatial Plan Vision and deliver the Assembly Government and County Council's other strategic policy objectives.

Document 2 contains a detailed tabular presentation of projects with details of outputs, outcomes, funding requirements and potential phasing. Document 2 also provides the information base for Section 6 of the main document which sets out a simple and transparent prioritisation check-list which will form a basis for the continuing management and negotiation of priorities by the key funders and partners.

The main themes of the Masterplan reflect the ambition;

- To make Haverfordwest a strong and vibrant County Town providing the key service functions for the County and readily accessible to residents of the County by road and public transport.
- For the County Town to be a key location for growth and new housing development supporting economic growth opportunities at the Withybush Business Park and Haverfordwest Airport.
- That Milford Haven and its neighbouring settlements should provide a strong local service centre role with the regeneration agenda led by the commercial, leisure and tourist opportunities of further development of the Marina together with a strengthening industrial and service base building upon the investment in energy facilities and management of the Port and Waterway.
- That Pembroke and Pembroke Dock should provide the County's secondary retail and service centre serving the day to day needs of the south of the County together with developing a strong employment base with higher skill levels in energy, engineering and specialist manufactures based on the Technium and Cleddau Bridge Business Park and the complementary development of a stronger more attractive town centre marina environment in Pembroke Dock whilst restoring the quality of environment in the historic town of Pembroke.
- To ensure strong and sustainable local economic development in Fishguard, Tenby, Saundersfoot, Narberth and other local centres.

The Pembrokeshire Regeneration Masterplan

Contents:

- 1.0 PURPOSE
- 2.0 POLICY STATUS
- 3.0 NEEDS AND OPPORTUNITIES
- 4.0 EXTRACT FROM SPATIAL PLAN – THE PEMBROKESHIRE HAVEN AREA
 - 4.1 Building Sustainable Communities
- 5.0 DEVELOPING THE SPATIAL PLAN VISION: THE MAIN TOWNS IN PEMBROKESHIRE
 - 5.1 Haverfordwest
 - 5.2 Milford Haven , Hakin, Neyland and Johnston
 - 5.3 Pembroke & Pembroke Dock
 - 5.4 Fishguard
 - 5.5 Tenby & Saundersfoot
 - 5.6 Rural Pembrokeshire
- 6.0 PROJECT PRIORITISATION AND DELIVERABILITY
- 7.0 SUMMARY AND CONCLUSION

APPENDIX 1

- 8.0 SETTLEMENT ANALYSIS
 - 8.1 Haverfordwest
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions
 - 8.2 Milford Haven including Hakin, Neyland & Johnston
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions
 - 8.3 Pembroke & Pembroke Dock
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions
 - 8.4 Fishguard & North Pembrokeshire Regeneration Strategy
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions
 - 8.5 Tenby & Saundersfoot
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions
 - 8.6 Rural
 - Key Weaknesses and Opportunities
 - Policy and Public Sector Interventions

(DOCUMENT 2) MASTERPLAN PROJECTS DESCRIPTION, OUTPUTS, OUTCOMES PHASING AND FUNDING REQUIREMENTS.

Welsh Assembly Government (DE&T) Pembrokeshire County Council Regeneration Masterplan 2008-2013

1.0 PURPOSE

Is to provide a short statement of the current investment programmes for the economic and community regeneration of the County of Pembrokeshire over the next five years.

In so doing it will provide a basis for improving the forward planning of investment by the Welsh Assembly Government and County Council and other key partners in the public and private sectors who are also investing in Pembrokeshire.

It will provide a “snapshot” that will be regularly reviewed and monitored to ensure expenditure is prioritised to best effect. It will thus be an important management and co-ordination tool.

A key role will be to ensure that project “lead-in” times can be properly programmed so as to ensure maximum efficiency in meeting annual spending targets.

It will also most importantly demonstrate that investment projects are selected within the context of a clearly defined policy framework with specified outcomes and outputs relevant to that policy framework.

2.0 POLICY STATUS

General Strategic guidance in Wales in respect to statutory planning and public sector investment is set out in the “Wales Spatial Plan” adopted in November 2004 and published by the Welsh Assembly Government.

That plan identifies a “Pembrokeshire Haven Spatial Plan Area” which will provide opportunities for growth and investment within an overall vision which is;

“strong communities supported by a sustainable diverse economy based on the area’s unique environment, energy opportunities, maritime access and tourism growth opportunities”.

Additionally, there are a number of other Assembly Government Policy Statements all of which help inform both the statutory planning policies of the Local Authority and the investment decisions of the Assembly Government; the County Council; other Partners and the E.R.D.F. Convergence Funding programme of the European Union.

Other key policies and plans which help to inform the regeneration Masterplan and framework for investment include the Pembrokeshire Community Plan, the J.U.D.P. for the County, the Economic Development Statement, the Rural Development plan and the Welsh Assembly Government’s Regional Regeneration Framework.

This plan also incorporates the “Landscapes working for Pembrokeshire” strategy which identifies specific opportunities for investment in the environment of the county.

It is a key aim of this Masterplan to be compatible with the wider policy framework and ensure it is delivering the shared agenda that these policies taken together reflect.

This Regeneration Masterplan is intended to sit within this framework. Projects are set out so as to reflect the settlement hierarchy established by the Wales Spatial Plan. Some flagship projects will by their scale and nature impact on the whole of Pembrokeshire and beyond.

3.0 NEED AND OPPORTUNITY

It is essential that this Masterplan can demonstrate a return on the public investment committed – a return which meets real needs and delivers sustainable solutions.

In this context it is important to recall that over the last decades Pembrokeshire has suffered some of the UK’s highest rates of unemployment and deprivation eg.

Even with recent improvements in figures the County has 3 ‘Communities First’ Partnership areas designated because of issues of deprivation and located in Haverfordwest, Milford Haven, Neyland, Pembroke Dock and Pembroke. Lower Super Output areas in Pembroke Dock, Llanion and Pembroke, Monkton continue to rank highly in the Welsh Index of multiple deprivation.

Employment has grown from 44,000 in 1999 to 53,000 in 2007. Construction works associated with the major capital investments in the gas terminals currently under construction along the Milford waterway has contributed.

This masks a slower rate of growth in the underlying economy and tends to overshadow realisation that Pembrokeshire was recently ranked 2nd in the UK in terms of low wage areas. This is a particular problem where house prices in the County are now disproportionately high in UK terms.

It is therefore essential that public sector intervention in regenerating the Pembrokeshire economy continues to tackle the key needs of:

- a) ensuring that the local economy is strengthened to ensure a ‘soft landing’ once the construction phase of the major national infrastructure projects is completed.
- b) delivering an economy with better paid and higher quality jobs, and,
- c) tackling the county’s overdependence on low wage and seasonal jobs.
- d) ensuring an adequate supply of industrial sites and premises across the County.

The opportunities to transform Pembrokeshire into a modern, vibrant and dynamic economy are also reflected in this Masterplan building upon the County’s strengths such as:

- a) the potential of the Milford Haven Waterway.
- b) the quality of the natural environment.
- c) the potential of the population.

Realisation of these opportunities will require as a prerequisite, investment and improvement of transport links into the county.

This Masterplan therefore includes major high impact projects which will create new centres for higher value jobs and improved community life by :

- Developing the full potential of technically based jobs related to the oil, gas and energy presence in the County,
- Creating new higher value urban and historic environments and town centres.
- Creating new well located business parks and industrial premises, encouraging dispersed economic activity and providing entrepreneurship.
- Specific commercial and regeneration opportunities via marina and port related facilities.
- Enhanced all year round resort destination offering improved career opportunities in tourism.
- Developing iconic and inspirational facilities for delivering high quality 16-19 and lifelong education and training with a focus on economic priorities.
- Responding positively to the challenges presented by Climate Change and the passing of peak production of oil.
- Maximising the advantages of a high quality environment.

Together these can deliver for Wales a dynamic sub-regional hub helping to deliver a changed Wales within the next ten years.

4.0 **EXTRACT FROM THE SPATIAL PLAN**

An Overview of the Role of Settlements within a “Complementary Hub” in the Pembrokeshire Haven Area.

4.1 **Building Sustainable Communities**

The Pembrokeshire Haven spatial plan area has a resident population of some 150,000 in an area of just over 230,000 hectares. This makes the area second only to the Central region in its sparsity. The area displays a pattern of small and market towns, none with a population in excess of 20,000, separated by rural areas populated with small villages and hamlets characteristic of rural Wales as a whole. These small and market towns differ from the extensive urban areas that characterise the North East Wales, South East Wales and Swansea Bay and the western Valleys spatial plan areas in their relative isolation, their enhanced service function compared to population and their interactions with the surrounding rural areas. Because of the area's rurality, relative peripherality and population sparsity, its most populous settlements need to fulfil roles and functions that would normally be associated with much larger towns. The key challenge, therefore, going forward is to ensure that the area's settlements, and in particular its urban centres, have the scale and catchment areas to sustain the level and quality of retail, leisure and services that will help improve what the area has to offer to both residents and visitors (who e.g. can double the population of Pembrokeshire in the peak season)

throughout the year. This so that, taken together, the settlements can work more effectively than they could if they were competing. Improving the area's communications infrastructure, including facilitating better access to the area's town centres, is not only integral to their future success but essential if we are to enable settlements seeking to develop complementary roles and functions to work together more effectively.

To help meet this challenge, the Spatial Plan Group has identified a number of key settlements that perform an important regional role and should therefore be an important focus for future investment.

These are:

The **Haven Towns** of Haverfordwest, Milford Haven, Neyland, Pembroke and Pembroke Dock, which cluster around the Milford Haven waterway and together have a population of 50,000 people. These towns need to develop roles and functions so that, collectively, they complement rather than compete with one another. Further work is being undertaken to define this but the main picture is as follows:

- **Haverfordwest's** town centre is currently under performing because it does not offer the range of quality retail, commercial or visitor facilities needed to realise its potential. A key focus will therefore be on town centre renewal, which will be focused on improving the town's retail performance, its commercial premises, its accommodation and leisure offer, accessibility to and within the town (including car parking), and improving the public realm (including e.g. riverside development potential) to provide for the increased population and to attract more visitors to the town.
- **Milford Haven and Neyland** a residential and commercial/town centre. Property needs to be upgraded to provide safer, more attractive neighbourhoods and retailing areas. There is potential to consolidate and upgrade much of the built fabric in the town centres, linked to development of the quayside and docks, and marina and marine leisure development.
- **Pembroke and Pembroke Dock** are anticipated to see employment growth linked to the continued development of the waterway, port growth and marina development. Investment in the built environment, local shopping and tourism assets is a priority to ensure that the towns are meeting their potential in terms of local service provision and tourism.

Carmarthen plays a pivotal role between three spatial plan areas: Pembrokeshire Haven, Swansea Bay and the Western Valleys and Central Wales. As a gateway to West Wales, Carmarthen fulfils a key role as a regional centre for retailing, health care, administration and agriculture. Investment in the town has made it increasingly popular as an attractive place in which to live, work and visit. Its status as a regional retail centre has been further strengthened through recent developments with proposals such as the flagship scheme proposed for the former mart site set to further enhance its retail and leisure offer.

Future development opportunities such as those at West Carmarthen are set to reinforce the towns status enhancing its appeal and its position as a residential, cultural and employment centre. The Quayside proposals seek to further

develop on the asset presented by the River Tywi by providing a range of services and uses specifically aimed at further maximising leisure opportunities, developing the riverside brand as a leisure and social contributor to the town.

Fishguard and Goodwick are important drivers of the regeneration of North Pembrokeshire. The area needs to be regenerated to respond to economic change. The ferry port gateway to Ireland, marina development, and the brownfield development site at Trecwn are some of the specific opportunities in the area.

In addition to the above regionally important settlements, the area also has a pattern of medium-sized settlements – Tenby, Narberth, Whitland and St Clears – which have a service centre/employment/tourism function, as well as a number of smaller settlements - Saundersfoot, St. Davids, Crymych, Kilgetty, Begelly, Carew, Laugharne/Pendine, Newcastle Emlyn, Newport, Cilgerran, Llandissilio, Letterston and Castlemartin - which are principally local centres, with some being significant tourism centres. These medium- and smaller-sized settlements are a key part of the area's attractiveness as a place to live, work in and visit. The communities situated in South East Pembrokeshire, together with those situated within the coastal corridor reaching to Laugharne in western Carmarthenshire, are important to the future development of the area's tourism offering.

Going forward, it is important that the area also looks outwards, and develops in ways that recognises the important role and function of places outside of its notional boundaries (e.g. Cardigan, which performs an important service centre role for parts of Northern Pembrokeshire) and seeks to build upon and strengthen those links, including links to the east to support the area's economic growth.

All regenerative, development and other investment activity in the area needs to reflect best practice and aim to meet the highest practicable environmental standards. Coherent programmes are needed that run over a number of years, so that a real difference can be made. They need to combine investment in buildings with help and support for local people in terms of training and business support, and be tied together by effective community involvement. Physical regeneration requires improvements to sewerage infrastructure, which is a constraint generally and in a number of areas (e.g. Haverfordwest/Withybush) is becoming a significant block to potential development.

Town centre regeneration and new housing more generally, needs to adopt high standards of design and sustainability, to increase the attractiveness of the area's settlements and to help cut carbon emissions, in line with Assembly Government policy commitments. Tenby and Narberth are excellent examples of rural and coastal centres which are regenerating their local areas.

Out of town retail development risks undermining the regeneration and viability of town centres, which is crucial to the area's future, as well as contributing to unsustainable traffic patterns. Appropriate planning tests must therefore be applied which avoid these disbenefits. The area has a diversity of brownfield sites, some of which have genuine potential in terms of land regeneration opportunities (e.g. the former Whitland Creamery site in western Carmarthenshire and Trecwn in Pembrokeshire) and others that are less well

located in relation to their prospects for development (e.g. the MOD land at Pendine and old WW2 airfields in Pembrokeshire). Such sites should be strategically assessed and, wherever appropriate, prioritised over greenfield sites. Strategic forward planning and upfront investment in essential service infrastructure (water, transport, sewerage, sustainable urban drainage) is essential in order for the area to realise its aspirations for sustainable development.

The demographic profile of the area has changed as result of a high number of economic in-migrants and the long-term growth in the number of retired people,

which has been well over twice the Wales average growth rate over the last two decades. Both trends have impacted upon service provision and availability of affordable housing. The challenge then is to sustain the vitality of the area's communities by responding and adapting positively to population change in ways which enhance the population age balance, ensures the housing mix supports that balance and does not exclude people from local housing, whilst sustaining the distinctiveness of local culture. As part of this, close attention needs to be paid to addressing the pockets of deprivation that exist within the area's urban centres and deprivation arising from poor service provision to the area's more remote communities.

5.0 DEVELOPING THE SPATIAL PLAN VISION : THE MAIN TOWNS IN PEMBROKESHIRE

5.1 Haverfordwest

Will be:

- the County Town
- The main centre within Pembrokeshire for delivery of public sector functions, local government, district hospital and specialist health care, further and higher education, justice, local offices of regional/central government and the public utilities.
- The principal centre for delivery of professional support services.
- The primary location for other support services and suppliers.
- The sub regional shopping centre and the County's primary retail offer with a wide range of opportunities in the town centre.
- The location of a range of high quality jobs many of which will be located in the Withybush Business Park with specialist activities linked directly to access to Haverfordwest Airport.
- The beneficiary of essential improved road links to the M4, south-east Wales and England.
- Directly accessible from the County's other key and local centres by road and by improved public transport links.

- The focus for large scale new residential development
- A leisure, events and cultural focus for the County.

5.2 **Milford Haven Including Neyland, Hakin and Johnston**

Will be:

- A local retail and service centre servicing day to day needs from improved but more tightly drawn centres.
- The base for operation control and major port service provision for the Milford Haven Waterway and related oil, gas, energy and other waterway related industrial developments.
- The location for a range of general industrial, commerce and service sector premises and estates.
- The location for further development of marina and related facilities.
- The base for expanded port service facilities
- The location of a mix of residential developments including affordable housing and improvement of existing estates.
- The base for developing a specialist role in the Pembrokeshire tourist product as a gateway to the Dale Peninsula and developing the attraction of it's marina, heritage and access to the waterway.
- A centre of leisure, culture and events.

5.3 **Pembroke and Pembroke Dock**

Will be:

- The location of the major centre for energy and science related development (Cleddau Bridge Business Park and Technium) as a key driver for provision of specialist and higher skilled employment in the energy, power, technological and maritime sectors.
- A centre of commercial port facilities and international ferry terminal in a historic dockyard setting which also provides quality accommodation in restored buildings for port related and commercial activity.
- The County's secondary retail and service centre reflecting its wider role in servicing South Pembrokeshire.
- The creation of an improved quality town centre and waterfront environment via the construction of a marina and residential development.
- The setting for the restoration of the historic and built environments of both towns.

- A principal centre for leisure based access to the waterways from the marina and other key locations.
- The location of a mix of residential accommodation types and affordable housing.
- The location of an improved relief road to take through traffic out of Pembroke's historic centre, creating opportunities for the "Communities First" community of Monkton and providing an up to standard heavy goods link to the industrial sites and refinery on the south shore of the Haven.

5.4 **Fishguard and North Pembrokeshire**

Will be:

- The location for a continuing major international ferry service.
- The site of a restructured port facility reconfigured so as to increase the capacity of the ferry terminal, whilst providing for a major leisure and residential based marina.
- The setting for provision of local services with an enhanced town centre.
- Location of targeted environmental and coastal access facilities to enhance the day visitor appeal of the town.
- The brownfield former MOD site at Trecwn reused.

5.4 **Tenby and Saundersfoot**

Will be;

- The base for limited local service delivery and local retail needs.
- The centre for provision of tourism services including specialist retail, leisure and catering to create a competitive high quality year-round resort destination.
- Improved by a better public realm with key sites redeveloped including prominent sites, attractions and beach facilities.
- The setting for provision of a range of affordable housing and community facilities.
- A location in the network of sailing destinations around the Welsh Coastline.

5.5 **Rural Pembrokeshire**

Will be;

- A rural economy stimulated and driven principally by support of the County's agricultural, rural and tourism industries, the encouragement of diversification and activities which add value to rural products.

- Supported by a programme of public investment in the environment of the County and National Park which has a priority focus on gateways and key transit routes.
- Also developed by a targeted and prioritised investment in the “special places and destinations” which are such important community and tourist assets in a local and Welsh context.
- Led by the substantial private sector investment in the Bluestone rural resort and the development of local supply chains and complementary activity packages.
- The location of continued regeneration of the smaller settlements of Narberth, the City of St Davids, Newport, St Dogmaels, Crymych, Cilgerran and Kilgetty.
- The base for provision of key rural industries and site infrastructure at locations such as Crymych and Fishguard to serve North Pembrokeshire.

6.0 PROJECT PRIORITISATION AND DELIVERABILITY

The purpose of this Masterplan is to provide both a clear strategic framework for public sector investment in Pembrokeshire and a planning/monitoring tool to manage programme delivery. It is meant therefore to be an integral part of the evidence base for public investment. The previous sections together with the Appendix tables have:

- a. outlined the Strategy and policy context; and
- b. described and summarised key projects their cost, current status, outputs and outcomes.

This section brings together the above by way of a summary matrix to provide a clear but simple basis for management consideration of the key characteristics of each project and its consequent prioritisation – again in a format which can be reviewed and updated in the context of partnership working and a negotiation of priorities amongst projects of varying characteristics and outcomes.

Column 1 - is an assessment of short term deliverability in the first two years of the programme based on considerations such as land ownership, consents in place, feasibility and design complete and “strategic fit”. It does not necessarily assume funding is in place or committed.

Column 2 - is the same assessment based on the predicted potential to make these projects deliverable for years 3-5 of the programme.

Column 3 - is a general assessment of the relative outcomes and outputs based on the statistics in the main schedules of this document and as assessed by the monitoring group.

Column 4 - is the funding potential a score based on consideration of two factors:

- a. potential private sector leverage; and
- b. potential fit to public sector funding programmes.

Column 5 - is a measure of 'risk' attached to projects – a risk which reflects the degree of potential private sector funding which may be subject to market charges, the degree of risk attached to public sector investment in new and untried products, the dependency on commercial uptake of buildings and property constructed etc. It is included as a guide to monitoring risk but is not used to "score" the project.

Column 6 - reflects the need for further project development work, feasibility study or design and whether this has the scope to make projects more deliverable, reduce risk and provide validated evidence of outcomes and outputs so as to improve the justification or encourage private sector involvement again it is not used to score a project.

Column 7 - is a prioritisation tool based on priority rankings in a scale of 1 the highest to 5 the lowest (thought still potentially worthwhile). The ranking reflects deliverability, outcomes and funding potential and is based on a summation of scores in column 1 to 4 inclusive, and a subsequent negotiated evaluation by the monitoring group to provide a transparent, yet manageable discipline.

The tables also show for completeness of recording the wider regeneration activity those significant private sector schemes not requiring public sector financial support.

It is also important to ensure that from such development planning obligation contributions will be negotiated where appropriate to help deliver the essential infrastructure requirements needed to underpin the strategy set out in this Regeneration Masterplan and those other policy statements that reflect the 'common agenda' for regeneration in Pembrokeshire.

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Key Settlement – Haverfordwest County Town / Sub Regional Centre							
Withybush Strategic Business Park – Phase 1	7	9	9	9	6	2	A
Haverfordwest Airport and Associated Private Sector	10	10	7	7	2	3	A
Town Centre Streets Parking and Retail / Commercial Growth Opportunities	10	9	7	6	1	1	A
Townscape Heritage Initiative	8	6	7	9	4	1	A
New Utility / Infrastructure Capacity	3	8	10	9	2	8	A
Withybush Strategic Business Park - Phase 2	1	4	8	8	8	4	C
Auto Retail Park	5	6	5	6	1	2	C
Withybush – Other Private Sector	3	5	8	8	1	5	C
Rural Centre of Excellence / Showground Relocation	1	5	7	7	6	8	C
White Goods Retail Park							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010--	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Continued - Key Settlement – Haverfordwest County Town / Sub Regional Centre -

Leisure Centre							
Pembrokeshire College Engineering Training Centre							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Key Settlements - Milford Haven and Neyland – Tier 1 Main Settlement							
Bulford Road (Relief)	5	8	9	8	2	8	A
New Utility / Infrastructure Capacity	3	8	10	9	2	8	A
Blackbridge Site	4	8	7	7	4	6	B
Town Centre Improvements	5	8	7	9	7	9	B
Milford Docks/Marina Major Expansion	1	4	10	9	5	9	B
Town Centre	4	8	7	8	3	7	B
Neyland Athletic Club	9	9	6	5	1	2	B
Mount and Other Estate's	3	6	7	5	2	7	C
Waterson Industrial Site	2	7	8	7	4	8	C
Gelliswick	3	5	6	5	3	5	D
Castle Pill / Wards Yard	1	4	6	5	8	5	E
LNG Plants							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Continued - Key Settlements - Milford Haven and Neyland – Tier 1 Main Settlement

4-Gas Power Station							
Irish Interconnection							
Thornsett – Victoria Road and Railway Station Sites							
Honeyborough Industrial							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Key Settlement - Pembroke and Pembroke Dock – Tier 1 Main Settlement							
Townscape Heritage Initiative – Phase 2	8	10	7	7	3	1	A
Pembroke Castle Pond (South Quay)	7	9	6	9	6	1	A
New Utility / Infrastructure Capacity	3	8	10	9	2	8	A
Garrison / Market and Vacant Site	6	9	8	7	5		A
Martello Quays Marina	5	9	10	9	7	2	A
Monkton Community	2	6	9	10	1	8	B
Dockyard Sites Property (non THI) MHPA	4	9	8	8	2	6	B
Pembroke to Pembroke Dock Riverside Trail	2	8	6	9	4	7	B
New General Industrial Units	2	5	8	7	3	8	C
Pembroke Regeneration Distributor Road and Development Opportunities	1	7	9	6	2	9	C
Technium and Science Park – Phase 2	2	7	8	7	7	8	C

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Continued - Key Settlement - Pembroke and Pembroke Dock – Tier 1 Main Settlement

Defensible Barracks	2	5	7	4	4	6	D
Pembroke Power Station RWE / N Power							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Key Settlement - Fishguard Regeneration Strategy – Tier 2 Settlement							
Marine Walk and Coastal Improvements	6	10	6	8	1	3	A
Town Centre Improvements	4	8	9	9	5	3	A
Fishguard Marina	2	5	10	8	8	6	B
Industrial Provision Dewhurst Block Celtic Links	1	5	6	8	2	5	C
Trecwn	2	6	8	7	6	8	C

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Key Settlement –Tenby, Saundersfoot and Surrounds Resort Regeneration - Programme Tier 2 Settlement							
Streets, Spaces and Gateways – Tudor Square	9	9	7	6	5	8	A
Car Park / Residential Redevelopment	4	9	7	8	4	5	B
Tenby Harbour / Low Water Landing	2	8	8	7	6	8	B
Saundersfoot Village Centre	3	8	8	8	3	9	B
Saundersfoot Harbour	2	5	8	6	4	9	C
St Catherine’s Island	1	5	6	6	8	7	D
Dovey Holdings (Property)							

PROJECTS	Deliverability Short Term 2008-09	Deliverability Medium Term 2010-2013	Outputs/ Outcomes	Funding Potential I	Risk Level	Scope to Improve Ranking by Project Development	Priority Ranking Based on Column 1-4
	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	High 10 – Low 1	1 none – 10 high	High A – Low E

Key Settlements - Rural							
National Park / Coastal Facilities/ Special Places /Destinations	6	9	7	6	1	8	A
Bridleway / Footpaths Developing the Product. Multi user and coastal routes.	7	8	6	9	1	8	A
Highways /Industrial Estate Landscaping	7	9	7	6	2	5	B
Rural Industrial Estates	1	7	6	7	3	8	C
Bluestone Project							

7.0 SUMMARY AND CONCLUSION

The top priority projects for public sector investment in Pembrokeshire between 2008 and 2013 on a Spatial Basis are:

PROJECT	PURPOSE	LEAD PARTNER(S)	SPATIAL PLAN FIT	SUSTAINABILITY	CONVERGENCE POTENTIAL
Haverfordwest					
<ul style="list-style-type: none"> Investment in the Town Centre it's buildings and public realm 	To deliver a strong county town	PCC/WAG	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Underpins range of businesses, enterprises and community facilities	Potentially eligible under Sustainable Regeneration Framework, if strongly linked to tackling deprivation
<ul style="list-style-type: none"> Investment in Phase 1 of the Withybush Business Park 	To provide high quality general industrial and commercial space for the growth of a stronger private sector economy	Private Sector / WAG	Promotes a sustainable economy Values environment Respects distinctiveness	Delivers range of sites and premises to meet a variety of needs and changing demands	Eligible under Sustainable Regeneration Framework, subject to outcome of prioritisation exercise
<ul style="list-style-type: none"> Investment in Haverfordwest Airport and relocation of agricultural Showground to provide improved added value rural facility 	To provide an improved communication option to support the County's economy and provide base for higher quality specialised job creation	PCC / WAG	Achieves sustainable accessibility Promotes a sustainable economy	Provides opportunities for specific economic uses at competitive rates and supports key transport facility for County	Airport not eligible. Potential for rural centre of excellence through RDP after 2010

PROJECT	PURPOSE	LEAD PARTNER(S)	SPATIAL PLAN FIT	SUSTAINABILITY	CONVERGENCE POTENTIAL
Milford Haven and Neyland					
<ul style="list-style-type: none"> Major extension to Milford Docks, marina and Port Services 	To provide a transforming waterfront focus for regeneration activities and international gateway	Milford Haven Port Authority / WAG	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Reinvestment of Port income together with private sector finance in long term facility to serve variety of commercial, community and tourism needs	Possible Convergence potential. Detail of proposal still to be assessed to determine appropriate Framework
<ul style="list-style-type: none"> Construction of Bulford Road Bypass 	Essential infrastructure Road Link to take heavy goods traffic to refineries and gas terminals out of town centre for safety and community benefits	PCC/WAG	Achieves sustainable accessibility Promotes a sustainable economy Values environment	Key to removing essential heavy goods traffic from congested town centre with safety improvements resulting	Convergence potential through Sustainable Transport Framework
<ul style="list-style-type: none"> Investment in consolidated town centres 	To deliver property regeneration and community facilities to meet changed strategic role (subject to Framework study)	PCC/WAG	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Will ensure creation of sustainable but smaller town centre	Convergence potential through Sustainable Regeneration Framework if linked to tackling deprivation
Pembroke and Pembroke Dock					
<ul style="list-style-type: none"> To ensure full take up and occupancy of the Pembrokeshire Technium 	To create catalyst for development of high quality technology based employment in line with Lisbon Agenda and Welsh Assembly Government Objectives	PCC/WAG	Promotes a sustainable economy Values environment Respects distinctiveness	Creates a specialist /sustainable centre to develop cutting edge energy links, skills and new businesses	Convergence potential through Innovation, R&D and Technology Framework

PROJECT	PURPOSE	LEAD PARTNER(S)	SPATIAL PLAN FIT	SUSTAINABILITY	CONVERGENCE POTENTIAL
Continued - Pembroke and Pembroke Dock					
<ul style="list-style-type: none"> Development of Martello Quays Marina Project 	To achieve regeneration of town centre with wider economic base	Private	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Environmental impact analysis has established environmental sustainability and economically supports town centre and community	No Convergence funding required
<ul style="list-style-type: none"> Restoration of historic and built environment in Pembroke and Pembroke Dock 	Key opportunities for commercial development and creation of quality accommodation for business with strong environmental benefits	Private/PCC/Heritage Lottery/ WAG	Builds sustainable communities Promotes a sustainable economy Values environment Respects distinctiveness	Focuses on bringing back into productive and long-term use derelict and underused historic buildings	Convergence potential through Sustainable Regeneration Framework, depending on end use
<ul style="list-style-type: none"> Continuing development of Pembroke Relief Road 	Essential infrastructure to improve connection between key industrial sites and deliver development and community opportunities for Pembroke and Monkton, together with regeneration of historic town centre.	PCC/WAG	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment	In taking heavy and other traffic out of historic town centre will create environmental and community opportunity in town centre and benefit deprived communities with improved journey to work options	Convergence potential, possible through Sustainable Regeneration Framework if linked to tackling deprivation; otherwise Sustainable Transport Framework
Fishguard					
<ul style="list-style-type: none"> Town Centre and Coastal Path Improvements with medium term marina project 	Improvement of local economy and stronger tourism role for the town centre	PCC / WAG	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Emphasis on coastal walking and environmental upgrading to support local leisure and tourism	Town centre has no Convergence potential; marina has Convergence potential but likely to be squeezed by national projects.

PROJECT	PURPOSE	LEAD PARTNER(S)	SPATIAL PLAN FIT	SUSTAINABILITY	CONVERGENCE POTENTIAL
Tenby and Saundersfoot					
<ul style="list-style-type: none"> Bringing forward of key redevelopment opportunities in both settlements with key Public realm enhancements 	Delivery of two market leading Welsh Coastal resorts offering high quality products over a longer season	Private / PCC / WAG / PCNPA	Builds sustainable communities Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Mixed use development by a variety of private and public organisation to create viable community hubs of different activities and underpin resort economy	Unlikely except through national projects but detail required to be able to assess fully
Rural					
<ul style="list-style-type: none"> Completion of first and further phases of Bluestone Holiday Resort. 	Key new rural tourism project and employment centre creating higher value tourism employment	Private	Promotes a sustainable economy Values environment Restores distinctiveness	Significant tourism product based on the Pembrokeshire location with ability to attract new businesses and markets	No Convergence required
<ul style="list-style-type: none"> Extension of strategic multi-user path recreational networks 	To deliver network of community and tourism facilities to provide enhanced and new product	PCC	Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Sustainable access countryside and coast	Convergence application in process
<ul style="list-style-type: none"> Environmental improvements and upgrading of destinations and special places 	Improvements vital to tourism and access to the countryside and ensuring quality standards met and visitor satisfaction.	WAG / PCNPA / PCC	Achieves sustainable accessibility Promotes a sustainable economy Values environment Respects distinctiveness	Upgrading and safeguarding of key environments and "hot" spots	Possible Convergence potential via national projects
County Wide					
<ul style="list-style-type: none"> Upgrade of Key Priority Infrastructure Provision 	To enable delivery of Key Regeneration and economic development priorities.	WAG / Utility Companies	Builds sustainable communities Promotes a sustainable economy	Meets need for long term provision of key services	Only in respect of servicing strategic industrial sites

PROJECT	PURPOSE	LEAD PARTNER(S)	SPATIAL PLAN FIT	SUSTAINABILITY	CONVERGENCE POTENTIAL
Continue - County Wide					
<ul style="list-style-type: none"> Provision Industrial Sites and Premises 	To review demand and supply position to provide evidence base for Public Sector investment decisions.	PCC/WAG/MH PA	Builds sustainable communities Promotes a sustainable economy	Allows growth of variety of economic and entrepreneurial innovation	Convergence potential subject to outcome of prioritisation exercise

8.0 SETTLEMENT ANALYSIS

This section provides a more detailed insight than contained in the Spatial Plan. It sets out the context for the schedule of projects to be prioritised over the next five years.

It thus seeks to establish the background to the detailed local investment programme set out in this document by settlement area. It reflects and builds upon the Spatial Plan statement and providing a more detailed policy justification for investment decisions.

8.1 Haverfordwest – County Town – Sub-Regional, Centre and Tier 1 Spatial Plan Settlement

Key Weaknesses and Opportunities

- Historic town centre but with a high degree of dereliction, under use and inappropriate floor-space and layout within buildings to meet modern space demands for retail, commercial and residential uses.
- The town centre is seen to be under-performing in commercial terms, both in regard to quality of shops and rental returns (£50 per sq. ft. in 2006 as against Carmarthen £85 per sq. ft. – Colliers CRE Annual Report). The Pembrokeshire County Council retail survey shows a drop in A1-A3 retail, both in total and occupied over the period 2001-2006.
- Poor quality of public realm in town centre.
- Lack of exploitation of river frontage and access to the Western Cleddau.
- Parking seen as difficult and restricted.
- Long-term problem of capacity constraints on traffic system.
- Poor linkages to and hence use of Castle and Priory
- Limited retail offer and lack of investment. A recent survey indicates a mismatch between the potential spending power and profile of customers in the catchment area and the retail offer in the town.
- Need to identify /create private sector development opportunities and remove less appropriate town centre uses e.g. car retailers to new auto retail park.
- Scope to improve leisure, cultural, community, entertainment, eating-out provision.
- Limited community/events opportunities e.g. build on success of farmers market to help bring community ownership and involvement into a more vibrant and exciting town centre.
- Major public sector employers The College, Hospital, Courts and private employers e.g. Withybush Business Park are out of town centre. Can they be better integrated e.g. lunchtime special buses.

- Need to improve night-time/evening environment and encourage some residential in development mix.
- Opportunity to establish the County Town as a part of the wider Pembrokeshire tourism experience.
- There is a need to create a sense of place, identity and distinctive character.
- Continuing need to upgrade existing housing stock.
- Ongoing development of a modern 12.5 hectare business park at Withybush and upgrade of existing industrial premises to meet today's commercial and sustainability standards.
- Provision of cost effective airport and related industrial facilities to maximise economic and community benefits of this facility to the County.
- Address the conflict between Airport and Agricultural Showground in a constructive manner that creates added value for both activities and which makes a positive contribution to the agri-food business in Pembrokeshire. At present, the Annual Show encroaches on the airport for two weeks in August – a situation which is not sustainable in the long term, as growth of the airport continues together with the impact of more stringent operating and licensing conditions.
- Provide public utility infrastructure upgrades to meet the needs of the Withybush Business Park and new residential requirements.
- To bring forward new housing development in accordance with the Development Plan allocations so as to underpin the growth opportunities in the town, notably the 1000 homes “Slade Lane” allocation.
- To plan for transport infrastructure improvement:
 - a) on key routes to the town in particular the A40 to meet existing and anticipated needs.
 - b) to improve the circulation system within and around the town to address capacity issues and.
 - c) to introduce traffic management and sustainable transport initiatives.

Policy and Public Sector Investment Interventions

Current

- Substantial programme of robust and integrated public realm investment in town centre streets, car parks and pedestrian links to provide a quality platform and catalyst for further private sector and riverfront redevelopment.
- Implementation of Townscape Heritage Initiative (backed by the Heritage Lottery) to regenerate a tightly defined part of the Town Centre Conservation Area.
- Continuing investment in residential property and environment under the Housing Renewal Programme.
- Completion of Leisure Centre.
- Ensure provision of essential public utility infrastructure for key sites (commercial, industrial and housing).
- Formalise partnership with Private Sector developer for delivery of Withybush Business Park.
- Ensure start of development of new auto-retail park and encourage relocation of dealerships from town centre sites.
- Deliver additional industrial/hangar capacity as a Phase 1 investment in the airport.

Future

- Preparation in 2008 of a Vision and Regeneration Priorities for the town centre to identify private sector redevelopment opportunities and to establish the business case for such investment and integrate it with plans to further enhance the Centre, key assets and the river frontage.
- Invest in key regeneration opportunities and support where necessary private sector initiatives as identified in that Vision from 2008 onwards.
- Complete Development Plan and Business Case for Airport as a basis for ongoing investment strategy.
- Develop investment programme for agri-food centre of excellence and resolution of land-use conflicts between the Pembrokeshire Showground and Airport.
- Develop transportation infrastructure plan.

8.2 Milford Haven including Hakin, Neyland and Johnston: Tier 1 Spatial Plan Main Settlement

Key Weaknesses and Opportunities

- Major waterfront gas and oil sites around the town – this involves a large but short-term construction programme, long-term lower levels of permanent operational staff and an ongoing requirement for contract and other associated maintenance work.

- Historically the town has failed to capitalise sufficiently or realise expectations of added value industrial development based on the presence of the oil industry on the Haven. There can be no guarantee that the present new investment in gas facilities will be any different in this respect without a proactive approach.
- However, the Waterways is developing as a major UK energy centre with wave and wind power opportunities as well as oil and gas.
- Increased shipping movement will result in associated business opportunities.
- There is limited land and property for smaller scale general industrial use.
- There are significant opportunities to utilise the towns location on the waterway to increase leisure and watersport use in the Haven and wider Pembrokeshire coastline.
- The ambitious redevelopment/regeneration project led by Milford Haven Port Authority in the former Milford Docks – has now provided an attractive and credible Marina, retail and residential package capable of further expansion.
- The original (Charles Street) town centre has been in long term decline and continues to struggle and has suffered from under investment in property maintenance and visually poor quality infill development.
- The town centre has a limited retail offer and it extends over an area now probably too large for its present function and operation. It contains more value shops than quality, and its attractiveness as a retail centre is low.
- A well located public transport nodal point around the railway station – a terminus with connections to London and Manchester – but poorly laid out, and with poor links to the town and adjoining retail centre and poor quality facilities.
- The town centre is separated from the Marina, the associated retail development and the railway station physically by a substantial “inland cliff” which makes pedestrian and other links between the two areas difficult. This is a fundamental issue presently limiting the possibilities for integration of the Marina and town.
- There are parking issues in both the old town and the Marina.
- The town lacks a relief road. A major issue given the level of heavy goods and construction traffic that has no option other than to pass through the town and its conservation area en-route to the major industrial sites to the west.
- The old town has an attractive area overlooking the impressive Waterway and the Marina and these link to extensive urban coastal walks to the west through Hakin.
- Despite the short term economic activity presently underway, key wards remain stubbornly very high on the index of multiple deprivation, and there is a continuing need for social and community support and infrastructure.
- There are substantial areas of poorer housing stock.

- Blackbridge – Immediately to the west of the town is the former Military Mine Depot currently the subject of proposals for development of a Bio Diesel production facility. This is sited on the eastern shore of Castle Pill. The western shore of this Pill is a derelict former industrial site (Wards Yard), the future of which is more likely to be incorporated in the context of extended proposals for the Milford Marina.
- To the west of the town is the community of Gelliswick located around Gelliswick Bay which although surrounded by industrial infrastructure offers some potential for general community use and water access. It is also overlooked by the very substantial Victorian Hubberston Military Fort, now derelict but an impressive ancient monument capable of re-use, but at a substantial cost.
- Neyland is a neighbouring waterfront town with a Marina constructed some 20 years ago. This provides an attractive water-frontage backed by walks along a disused rail track through a nature reserve.
- Neyland has lost its retail function and commercial centre and secondary education is provided in Milford. It has industrial and commercial sites on the edge of town alongside the route from Milford Haven to the Cleddau Bridge.
- Johnston is within the influence of Milford midway between it and Haverfordwest with many structural links to Milford. Like Milford it suffers from through traffic on the route to the major industrial sites on the south shore of the Haven. The settlement stretches along the trunk-road has an all defined centre but a strong community identity. At its centre lies a large derelict site known as Arnolds Yard the redevelopment of which provides a key opportunity.

Policy and Public Sector Investment Interventions

Current

- To work in partnership with the Milford Haven Port Authority to establish a long term plan for the future development of the Docks in the context of an agreed S.P.G framework (Specific Planning Guidance).
- This planning framework will need to resolve at an early date:
 - a) A comprehensive review of the remaining opportunities on the Waterfront.
 - b) A realistic future for the original town centre in the context of the Marine and Retail Park and the town's local strategic retailing role as against Haverfordwest and Pembroke Dock and provide a sound basis for public investment in managing the inevitable need for rationalisation.
 - c) Access issues to the expanded Marina together with transport and pedestrian links between the town and the Marina /Retail Park.
 - d) The provision of parking.
 - e) Development of the transport interchange facility.
 - f) The realistic contribution and role of the Docks and adjoining Waterfront in relation to the Pembrokeshire Tourism product.

Future

- To use this planning framework to prioritise community and business investment in identified projects.
- To continue to plan and deliver essential relief road infrastructure (in particular the Bulford Road links) to Milford Haven and Johnston to serve major industrial sites to the west of the town and ensure Section 106 agreements to future industrial expansion or these large sites reflects this essential infrastructure and community requirement.
- Community led investment in Gelliswick Bay.
- Support redevelopment of Blackbridge Site and its surrounds as a centre for Agri-energy production.
- Work with private sector and community in regard to establishing viable, beneficial and deliverable use for Arnolds Yard site in Johnston.
- Work with private sector owners to upgrade the Thornton, Waterson, Dale Road Hubberston and Honeyborough (Neyland) industrial estates.

8.3 Pembroke and Pembroke Dock Tier 1 Main Settlement

Key Weaknesses and Opportunities

- After a long history of economic decline since the closure of the former Royal Dockyard in the 1930, both towns have benefited from a co-ordinated Regeneration Strategy over the last 15 years. This has provided a solid platform from which to make further progress.
- Poor quality housing estates and social facilities.
- Potential for Marina based redevelopment of Pembroke Dock Waterfront.
- Related opportunities to develop 'marine' based leisure activities.
- Cleddau Bridge Business Park and Technium to create / support sustainable employment.
- Lack of general industrial land and property.
- Restrictions on public utility infrastructure.
- The impact of traffic on Pembroke's historic walled town and its detrimental impact on tourism and visitor appeal.
- A1-A3 retail space in Pembroke has decreased between 2001-2006.
- Pembroke by nature of its proximity to the Castlemartin Peninsula, its Castle and other attractions has potential to increase its tourism role.

- The retail floor-space in Pembroke Dock has remained level in the period 2001-2006 and is an important shopping centre for the South of the County.
- Inadequacy of routes to major gas, oil and power sites on south of Haven.
- The continuing high levels of multiple deprivation in key “communities first” wards.
- Lack of commercial leisure opportunities.
- Available resource of restored historic buildings in the former Royal Dockyard.
- Lack of operational space and parking for heavy goods vehicles in Royal Dockyard.
- Opportunity to strengthen and improve facilities of local engineering operators needing marine access.
- Continuing legacy of derelict, decayed, buildings and sites and poor quality public realm.
- Defensible Barracks a substantial unoccupied Victorian Barracks a listed building / scheduled ancient monument needing development and an appropriate end use.

Policy and Public Sector Investment Interventions

Current

- Continuing development of Technium and associated expansion of Business Park.
- Public Sector partnership enabling support for Martello Quays Marina proposal.
- Phase 2 five-year Townscape Heritage Initiative starting June 2007 including marketing of Phase 1 properties.
- Complete enabling role in securing private sector redevelopment of Castle Pond Pembroke.

Future

- Ensure appropriate investment in upgrading public utility provision to allow for growth.
- Identification, servicing and provision of further general industrial sites and premises.
- Complete design and approval processes for Pembroke Community and confirm funding and programming to link with Monkton Community initiatives.
- Develop proactive enabling role to restore Defensible Barracks with Private Sector lead.
- Support Community leisure and water-frontage initiatives e.g. Coastal multi-user routes.

8.4 **Fishguard and North Pembrokeshire Regeneration Strategy** **Tier 2 Settlement**

Weaknesses and Opportunities

- Following closure of key private sector enterprises and to alleviate resultant job losses, the Welsh Assembly Government in partnership with the County Council, introduced in 2003 a package of measures in the format of a Regeneration Plan, as a means of ensuring long term investment to create a sustainable economic future.
- Key projects such as the Leisure Centre, tourism support, the renovation of the Market Hall and Point and others have been completed or are underway.
- An integral part of the Fishguard and North Pembrokeshire Regeneration Plan is the redevelopment of Fishguard Town Centre to include pedestrian safety, improved vehicular circulation, a new town centre link road, attraction of a new supermarket and construction of a new primary school.
- There is a focus on the development of the tourism product with, for example, improvement of the standard of serviced accommodation and of key visitor facilities and access to the coast.
- The policies aim to integrate capital investment with programmes to improve skills, community support, serve the needs of youth etc.
- A proposal for a marina at Fishguard is seen as a central element to both enhance the tourism product and create job opportunities, but is delayed whilst legal obstacles are being resolved.
- The large Trecwn site – formally an MOD weapons facility – with its railhead, buildings and land is a substantial, presently unused, economic opportunity.

Policy and Funding Interventions

Current

- Continue to deliver key elements of the Fishguard Regeneration Plan including town centre redevelopment and enhancement.

Future

- Assist and enable development of the Fishguard Marina Project.
- Deliver the Fishguard Marine Walk as a key community and visitor attraction allowing access to this very special coastline adjacent to the town centre.
- Identifying and bring forward provision of sites and premises for industrial/commercial use.
- Work with owners to create a feasible development option for Trecwn.
- Explore funding opportunities for Link Road extension.

8.5 **Tenby and Saundersfoot Tier 2 Spatial Plan Settlement**

Key Weaknesses and Opportunities

- Longstanding resort area with established reputation and high visitor recognition profile.
- In 2001 an area with a six mile radius around Tenby and Saundersfoot was chosen by the then Wales Tourist Board as one of the six Regional Growth Areas in Wales ie. a destination capable of driving up quality standards and attracting new business and investment.
- The partnership of trade, community and public sector partners set up to oversee delivery of that investment strategy remains in existence, and the key objectives remain relevant ie:
 - a. to strengthen the product offer;
 - b. to embrace quality management;
 - c. to create an all-year round destination.
- Heavy concentration of employment opportunities in the tourism industry. Much of this remains seasonal hence a key objective is to lengthen the season. Recent trends suggest this is beginning to occur.
- Tenby and Saundersfoot have significant natural attractions and coastline and are, as a consequence, part of the Pembrokeshire Coast National Park.
- The historic town of Tenby has examples of Medieval, Tudor, Georgian and Victorian architecture which creates significant character. Despite much restoration and repair there remains significant examples of decay and dereliction.
- Saundersfoot, despite its attractions, was recently described in a national newspaper as a “scruffy little village in which to find such a high quality hotel”.
- A substantial element of poor quality serviced accommodation, some ungraded, still remains. There is a need for more high quality serviced accommodation, principally by upgrading the existing stock.
- Lack of business re-investment by private sector.
- Poor standard of gateways, first impressions and key visitor facilities eg. toilets, car parks.
- Butts Field and Salterns Car Parks are considered too peripheral by some visitors with poor pedestrian links to the town.
- Limited cultural and entertainment facilities though the last decade has seen substantial provision of day visitor themed parks in surrounding area.

- Tenby and Saundersfoot harbours both lack infrastructure and have problems of more demand than supply in terms of user requirements and in particular before they can match the wider Welsh Assembly Government's strategic objective of developing safe harbours and infrastructure to support boating around the Welsh Coastline.
- However, both harbours have real issues in respect to conservation and the impact of any improvement works or increase in capacity the provision of which will therefore require solutions to be sensitive and appropriate.
- There remains in both harbours buildings and structures of character but in poor condition.
- The property market is stronger than it has been for many years which should provide the opportunity for investment and redevelopment not achievable in the past. But a number of key eyesore and difficult sites remain untackled despite these more favourable economic conditions.
- Poor quality public realm, including some key spaces such as gardens etc.
- Traffic management and parking are issues in the peak season.
- The introduction of specialist park and ride services and coastal routes to supplement the normal service network have been successful but require subsidy.
- After several years of controversial pedestrianisation experiments in Tenby's Walled Town – popular with visitors, less so with residents – there is now broad support for a compromise scheme which it is hoped will lay the foundations for a permanent scheme.
- Rail and bus connections to the resorts remain in place. Saundersfoot station is remote from the village and a number of issues affect the maintenance and utility of this station.
- The retail offer is heavily geared to the tourist trade though a key local service function continues and it is seen as a priority to retain this. The main food retail site for the locality is Kilgetty, although Pembroke Dock is also significant.
- There is a shortfall of industrial sites and property.
- A significant part of the population is retired and of those of working age, a number work out of the County.

Funding and Policy Interventions

Current

- Continue support for the strategy and agenda of the Tenby Tourism Growth Area.
- Complete restoration and enhancement of Tenby Harbour and environs and its capacity to cater for visiting yachts and local needs.

- Complete programme of refurbishment of key public spaces in Tenby to include the public realm of the walled Town, notably Tudor Square, and public gardens, promenades, shelters, public facilities etc.

Future

- Undertake a feasibility and design study to bring forward provision of Low Water Landing Stage at Tenby and in partnership with the owner, a link to St Catherine's Island, so as to provide a means of public access to the Island linked to the potential to fund a sustainable end-use.
- Work with key partners in Saundersfoot to prepare a phased Action Plan for private and public sector investment to create a sustainable long-term future as a community service centre and resort.
- To bring forward private sector redevelopment in Tenby at the existing Multi-Storey and the North Beach (Butts Field) Car Park to improve the environment at and around these key gateways to the resort.
- To develop coastal facilities, where achievable in the context of the National Park and conservation constraints to meet the Assembly Government's "Catching the Wave" Agenda.
- To enable and assist the bringing forward of private sector redevelopment opportunities at key sites, including:
 - The former Royal Gatehouse and Cinema Site, Tenby.
 - The South Beach Café Site, Tenby.
 - The environs of Upper Park Street, Tenby.
 - The Rectory Car Park Site, Tenby.
 - Key sites identified in the Saundersfoot Action Plan.
 - North Beach Café and other beach based locations.
- To identify in the context of the Joint Unitary Development Plan, the potential to bring forward development of appropriate industrial land and premises to help widen the economic base of the area.
- To improve traffic management in Tenby and Saundersfoot and consider potential for complementary, sustainable and innovative public transport.

8.6 Rural

Key Weaknesses and Opportunities

- The rural community has suffered from a succession problem.
- That economy is often constrained by an over dependence on external market and economic trends.
- A combination of the above has contrived to keep incomes and wages low.

- Nevertheless there is a significant economic and entrepreneurial base, a track record of investment numerous particular examples of diversification and adding to product value.
- There remains scope for more such initiatives to stabilise and develop the rural economy and the County with its strong tourism and environmental image being particularly favourable to create cross cutting links between agriculture, rural pursuits and activities, tourism , added value processing and marketing and environmental innovation and leadership.
- The County processes a high quality, well known and attractive environment underpinned by the existence of its Coastal National Park which in a period of concern for the climate can provide first choice alternatives for home based holidays in the UK.

Funding and Policy Intervention

Current

- Investment in the rural environment conservation and visitor management by the Pembrokeshire Coast National Park Authority, Countryside Council for Wales, Pembrokeshire County Council, Welsh Assembly government and other key stakeholders.
- Development of Farmers Market initiatives and the Pembrokeshire Quality mark to underpin marketing initiatives.
- Assembly Governments farm business support activity.
- Support for community led development and regeneration across the County and in settlements such as Narberth, Newport, St David's and St Dogmaels.
- Support for public transport.

Future

- Provision of rural industrial sites at Crymych and Fishguard.
- Identification of potential to develop and support examples of excellence in the rural community.
- Ensuring improved access for the rural community to improved key services.
- Provision of an appropriate supply of affordable housing.
- Delivery of key priorities set out in the County's Community Plan and the Rural Development Plan (RDP).
- Continued support of existing regeneration activity in smaller settlements e.g. provision of additional car parking at Narberth to meet specific local needs.