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Two County Economic Study for Carmarthenshire and Pembrokeshire

*Appendix A Literature Review
Final Issue*



ARUP

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1 Introduction

1.1 Overview

In support of a Larger than Local Economic Study for Carmarthenshire and Pembrokeshire, the purpose of the following Document Review is to explore existing objectives and interventions for growth for a wide range of employment uses within Carmarthenshire and Pembrokeshire. In accordance with Planning Policy Wales, which defines economic development broadly so that it can include any form of development that generates wealth, jobs and income, the Review covers documents from a broad range of sector backgrounds. Traditional business use classes (classes B1-B8) only account for part of the activity of the economy.

By reviewing national, NDF regional and local objectives, the Review seeks to acknowledge that the Larger than Local Study is not starting from scratch and is instead an evolution of existing interventions and opportunities for growth. Reflecting the context of the Practice Guidance¹, the ‘Larger than Local’ study evidence base will focus on identifying relevant policy objectives from Welsh Government and other bodies that provide strategic direction in order to develop recommendations for new ‘strategic’ level policies or objectives across the Larger than Local area and for inclusion in LPA development plan

One purpose of the Document Review is therefore also to review the existing definition of a ‘Strategic Site’. This, when combined with the outcomes of the data analysis and feedback from property agents, key businesses and key stakeholders within the area, will be the definition that is used throughout the Study.

¹ Practice Guidance – Building an Economic Development Evidence Base

2 National Objectives

2.1 Overview

The following reviews national objectives and initiatives within the National Development Framework, Take Wales Forward as the Welsh Government's latest Programme for Government, Prosperity for All and Planning Policy Wales (Edition 10).

2.2 National Development Framework (2019)

The Welsh Government has published the draft National Development Framework for Wales (NDF). The draft document is currently out for consultation until 1 November 2019. Once formally adopted, the NDF will be a development plan for the whole of Wales, setting out a spatial planning strategy for the next 20 years. The NDF is intended to replace the current Wales Spatial Plan (2008)², but sit alongside Planning Policy Wales.

The policies of the draft NDF have been arranged within two broad categories:

- Strategic and Spatial Choices: the NDF Spatial Strategy
- The Regions

The policies under the heading of Strategic and Spatial choices focus on broad themes relevant to Wales as a whole, such as supporting rural communities (Policy 4) and renewable energy development (Policies 10-15).

The NDF places a particular focus on the importance of regional working across Wales and advocates for the preparation of Strategic Development Plans (SDPs) to sit between local policies and the policies of the NDF. The NDF (under the heading of 'The Regions') includes policy specifically in relation to the preparation of SDPs (Policy 16) as well as providing regionally specific policies designed to aid local planning authorities in the preparation of these documents.

Policies related specifically to the Larger than Local are outlined below:

Policy 23 (Swansea Bay and Llanelli) states that 'Swansea Bay and Llanelli will be the main focus for regional scale growth and investment'.

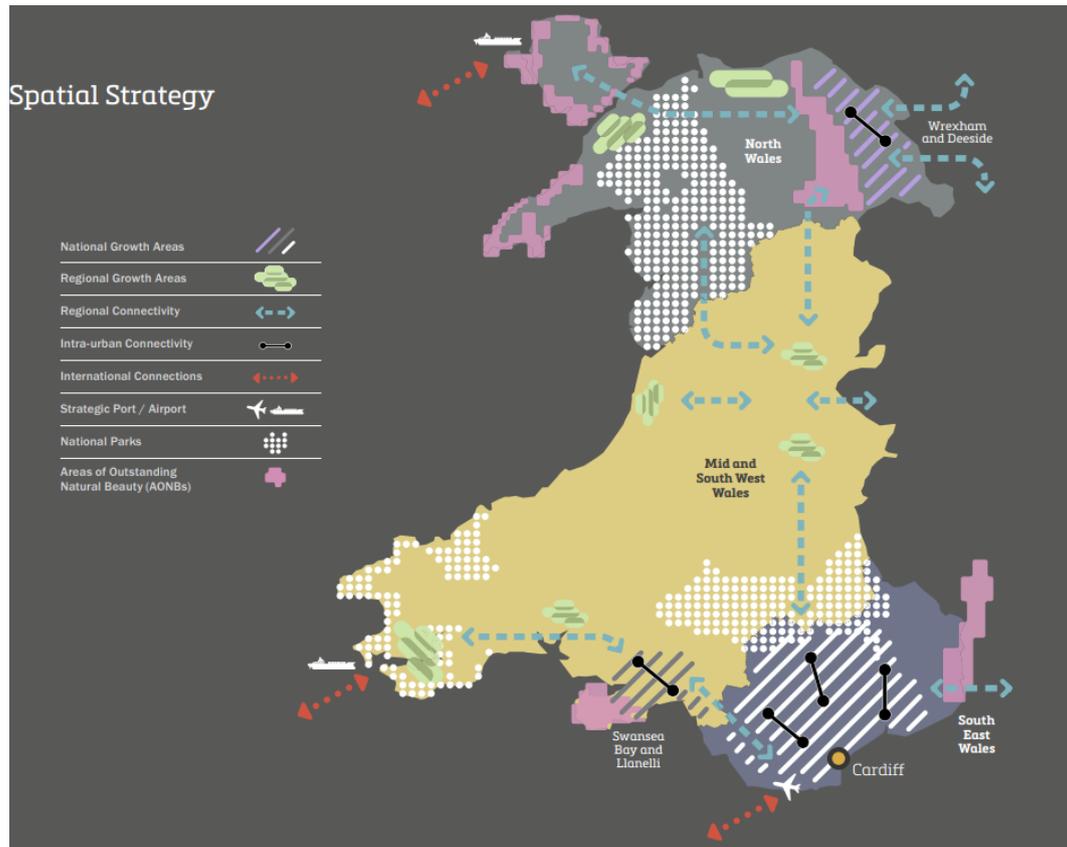
Policy 24 (Regional Centres) sets out that 'the towns of Carmarthen, Llandrindod Wells, Newtown, Aberystwyth and the four Haven Towns will be the focus for managed growth, reflecting their important sub-regional functions.'

Policy 25 (Haven Waterway) states the Welsh Government's support for future development at the Haven Waterway and specifically states that both SDPs and LDPs should support its growth and 'seek to maximise its benefits'.

The Spatial Strategy of the NDF is shown in **Figure 1** below:

² <https://gwedddill.gov.wales/docs/desh/publications/130701wales-spatial-plan-2008-update-en.pdf>

Figure 1 NDF Spatial Strategy



2.3 Taking Wales Forward (2016-2021)

Evolving from the Well-being of Future Generations Act, Taking Wales Forward (2016-2021) is the Welsh Government’s latest Programme for Government.

The document sets out how the Welsh Government will deliver more and better jobs through a stronger, fairer economy, improve and reform its public services, and build a united, connected and sustainable Wales. The document establishes seven well-being objectives and 14 objectives, of which are broadly based around the following:

- Creating conditions to give every child the best start in life and improve education outcomes to reduce the gap in outcomes for different groups;
- Help people live health and independent lives, and support a healthy workforce;
- Improve prosperity for all across Wales, helping people into employment and sustaining jobs;
- Create conditions for people to learn and use the Welsh language, promote and enhance the culture and heritage of Wales, and support safe, cohesive and resilient communities;

- Support the transition to a low carbon and climate resilient society and manage, use and enhance Wales’ natural resources to support long-term well-being;
- Connect communities through sustainable and resilient infrastructure;
- Foster conditions for sustainable economic development and employment, whilst stimulating innovation and growth for a modern low carbon economy;
- Facilitate high quality, responsive and better integrated public services, to those that need it most enabling citizens to be an equal partner; and,
- Position Wales as an internationally focussed, ambitious country engaged and connected to the wider world.

It emphasises that the UK withdrawal from the European Union creates some uncertainty and challenges, but the Welsh Government’s mandate is clear: the Welsh Government’s relentless focus will be on driving improvement in the economy and public services.

2.4 Prosperity for All: The National Strategy and its Economic Action Plan (2017)

Taking Wales Forward is the latest Programme for Government; ‘Prosperity for All’ takes those key commitments, places them in a long-term context, and sets out how they fit with the work of the wider Welsh public service to lay the foundations for achieving prosperity for all. In summary:

- The **National Strategy** explains how although Wales as a whole has grown strongly out of recession, there are areas of the country which have not seen the full benefits of growth. This has left some communities struggling to prosper and feeling isolated from other parts of Wales.

Key themes within the National Strategy are for a prosperous and secure economy, with healthy and active individuals, ambition for learning; and, united and connected communities.

- The **Action Plan** aims to grow the economy and reduce inequality.

Table 1 Economic Development Actions within Prosperity for all: The National Strategy

Tackling Regional Inequality and Promoting Fair Work	Support people and business to drive prosperity
<ul style="list-style-type: none"> • Introduce a new regionally-focused model of economic development, working with each region to determine and drive its own sectors according to its strengths and opportunities. • Focus on a smaller number of national sectors where there are particular challenges or opportunities across Wales. • Support rural businesses to diversify and take advantage of supply chains, including the need to increase their 	<ul style="list-style-type: none"> • Commit to a new ‘Economic Contract’ between business and government to stimulate growth, increase productivity, and make Wales fairer and more competitive. • Simplify and rationalise the range of financial support we offer to companies, ensuring it is clear, easily understood and responsive. • Develop a modern, regulatory framework, through smarter regulation to ensure

Tackling Regional Inequality and Promoting Fair Work	Support people and business to drive prosperity
<p>processing capacity and add greater value.</p> <ul style="list-style-type: none"> • Ensure the new ‘made in wales’ successor to EU structural funds is fully integrated with our overall approach and delivers maximum added value for individuals, regions and Wales as a whole. • Design major welsh government infrastructure projects to join up public services and other developments, to maximise regional benefits. • Harness the opportunities of major infrastructure projects, such as Wylfa Newydd and Swansea Bay Tidal Lagoon. • Provide more effective support for the development of local supply chains and clusters, so that economic value is retained locally, and more employment opportunities are created closer to home. • Take the steps needed to make Wales a fair work nation, building on the work of our fair work commission. • Ensure commitment to ethical employment from every business supplying the public service. 	<p>competitiveness and the right economic environment for them to grow.</p> <ul style="list-style-type: none"> • Establish the new Development Bank of Wales, improving access to finance for businesses, alongside high-quality support services and management advice. • Maximise the value of Welsh public service procurement to Wales, while ensuring that employees get a fair deal for the work they undertake funded by public money. • Use our business support to build capacity and innovation within our home-grown businesses including local supply chains, to enable more to be procured from businesses in Wales. • Further develop engagement between universities, industry and the NHS and social care to drive economic growth through applied research and innovation. • Develop a new employability plan for Wales, focusing on the diverse needs of individuals, and responsive to the particular skills needs of each part of the country. • Implement our 30 hours of free education and childcare to support working families across Wales and make it easier for people to take up and retain jobs.

Figure 2 Well-being Objectives National Strategy



Critically, in order to achieve this aim, the National Strategy and the Action Plan commit to a regional approach to economic development in Wales, focusing a smaller number of national sectors. The National Strategy stating that the Welsh Government will ‘introduce a new regionally-focused model of economic

development working with each region to determine and drive its own sectors according to strengths and opportunities.³

In addition, the National Strategy also endorses support for rural businesses to diversify and take advantage of supply chains, including the need to increase their processing capacity and add greater value.

2.5 Planning Policy Wales, Edition 10 (2018)

Published in December 2018, the tenth edition of Planning Policy Wales (PPW10) sets out the land use planning policies of the Welsh Government. Within the latest edition, a new emphasis is given to the concept of placemaking, in conjunction with a closer alignment with the Well-being of Future Generations (Wales) Act 2015.

Within PPW10, sustainable development is defined as ‘the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the Well-being Goals.’

Economic development and its relationship to the planning system is set out under the heading of ‘Productive and Enterprising Places’. PPW10 confirms that for planning purposes, the Welsh Government defines economic development as ‘the development of land and buildings for activities that generate sustainable long-term prosperity, jobs and income.’ PPW10 states that the planning system should ensure that growth and employment within Wales is not constrained by a shortage of employment and retail land uses and land for tourism and public services related development.

In order to ensure this, PPW10 sets out best practice for planning authorities. In terms of development plans, paragraph 5.4.3 of PPW10 states that LDP’s should ‘identify employment land requirements, allocate an appropriate mix of sites to meet need and provide a framework for the protection of existing employment sites of strategic and local importance’. In identifying these sites, paragraph 5.4.5 sets out that planning authorities should establish an evidence base to inform the provision of economic development uses through producing Employment Land Reviews which planning authorities should work together to prepare.

Summary: National objectives and initiatives are broadly based around three main themes:

- A focus on changing the way in which Welsh public services and ways of working are currently delivering, whether this is through the Well-being of Future Generations Act or through the National Strategy which states that Welsh Government will introduce a regionally-focussed model of economic development.
- Connected and prosperous communities, with fair employment and higher productivity built around the strengths of each part of the country.

³ Page 9 - <https://gov.wales/sites/default/files/publications/2017-10/prosperity-for-all-the-national-strategy.pdf>

- A recognition that Wales' connections with the wider world are important, not least in response to the uncertainties of Brexit, and that increasing productivity and competitiveness will be central to the economic future of the country. High quality skills, focusing a smaller number of priority sectors, with the right digital and transport infrastructure will be fundamental to achieving this goal.

There is a recognition that EU structural funds will be succeeded by 'Made in Wales', for which there will be a need to deliver maximum added value for individuals. Similarly, the Prosperity for All: National Strategy states that there will be a need to simplify and rationalise the range of financial support offered to companies.

3 Regional Objectives

3.1 Overview

By interpreting the national objectives for economic development, it is clear that there is an emerging focus on regional growth and specialisation. The following section reviews the Enterprise Zones, initiatives associated with the Swansea Bay City Deal and the objectives within adjacent, but neighbouring, regions.

3.2 Enterprise Zones: Haven Waterway

Overview

There are currently eight Enterprise Zones in Wales which have been designated by the Welsh Government as strategic employment sites designed to help stimulate economic development in the areas in which they are located.

The objectives of Enterprise Zones are to grow the local economy and create jobs, act as a catalyst for growth in other parts of Wales, improve the attractiveness of the Enterprise Zone for investors and to strengthen the overall competitiveness of the Welsh economy⁴. In order to help achieve these objectives Enterprise Zones in Wales benefit from a range of incentives including financial incentives and grant aid from the Welsh Government as well as accelerated planning processes.

The eight Enterprise Zones across Wales are as follows, each of which is focused on a target sector:

Table 2: Enterprise Zones in Wales

North Wales	South East Wales	Mid & South West Wales
Anglesey	Ebbw Vale	Haven Waterway
Deeside	Cardiff Airport & St Athan	Port Talbot Waterfront
Snowdonia	Central Cardiff	

The only Enterprise Zone within the Larger than Local area is **Haven Waterway**. This Enterprise Zone comprises of nine primary sites⁵ and has a focus on the energy and environment sector. Known as a ‘Tier 1 Area’, investors to this zone have potential access to the highest level of grant aid available in the UK. Key industry figures/infrastructure already established in this Enterprise Zone include, ExxonMobil, RWE, Valero Oil Refinery, Wales’ first commercial Solar Farm at Rhosgilwen and the largest Combined Cycle Gas Turbine (CCGT) power station in Europe⁶.

⁴ Enterprise Zones Wales (2018) <https://gweddill.gov.wales/topics/businessandconomy/growing-the-economy/enterprisezones/?lang=en>

⁵ <https://businesswales.gov.wales/enterprisezones/zones/haven-waterway/areas-and-sites-haven-waterway>

⁶ <https://businesswales.gov.wales/enterprisezones/zones/haven-waterway/business-environment-haven-waterway#whos-already-here>

Haven Waterway Enterprise Zone Strategic Plan⁷

The Board has identified the following key priorities and objectives for the area as follows:

- **Consolidating and maximising opportunities in the oil and gas sector:** As the area provides around 20% of the UK's energy suppliers received in Pembrokeshire, a priority will continue to be building on the area's established industry base.
- **Develop a Food Park, Withybush, Haverfordwest:** Provision of a Food Park and infrastructure will provide the opportunity to deliver 'added value' and retain the economic benefits locally. The EZ Board are key to develop links with academia to underpin the market for Pembrokeshire food. Increased demand for the export market for Pembrokeshire food will drive growth.
- **Continued development of the Cruise Sector:** The Strategic Plan also recognises the growth in cruise calls in the Haven (which have increased by almost 500% in 2 years). In 2018, 34 cruise ship calls were attracted to Pembrokeshire with approximately 10,000 passengers and 3000 crew. The Board is supportive of maximising local supply chain opportunities for the cruise companies and passengers, particularly around food and hospitality.
- **Maximising the Benefits of Valero's £127 million Combined Heat and Power Plant:** The Board is looking to work with Valero and other stakeholders to maximise economic opportunities for the Zone
- **Full exploitation of Superfast Broadband & IT Infrastructure:** As the Haven area now has over 98% of premises with Superfast Broadband, there is now potential to open up new opportunities for businesses to become supplier or specialists in IoT.
- **Addressing the skills 'gaps':** Work is continuing with Pembrokeshire College to develop a package of support measures and priorities.
- **Support the development of the Pembroke Dock Marine Project:** This is identified by the EZ Board as a key Swansea Bay City Region Project, which includes the Marine Energy Engineering Centre of Excellence at Pembroke Dock. The EZ Board supported a £11.5million development as part of the local Marine Energy supply-chain.
- **Post Brexit Opportunities – Free Ports:** The Brexit scenario will present challenges to the area, however this may also present opportunities in have westwards facing ports with connections to Ireland. A potential Freeport in the Haven area is being considered.
- **Qatar Opportunities:** The EZ Board consider there are opportunities provided by Qatar / Cardiff flights, particularly in relation to the Food and Tourism sectors.
- **SME Business Interaction Group:** Following the loss of Murco from the area, the Group has increased in importance – providing a base for indigenous

⁷ <https://gov.wales/sites/default/files/publications/2019-03/haven-waterway-enterprise-zone-strategic-plan-2018-2021.pdf>

SMEs to network within the area. This continues to be a key conduit between large-scale infrastructure and facilitating engagement with SMEs.

- **Infrastructure:** The Board will continue to prioritise enhanced infrastructure to and from the Zone, including a transport study for the Haven Waterway. It is a priority of the Board to maximise opportunities currently presented by existing infrastructure associated with current energy, port and IT infrastructure which are unique selling points for the Haven.

In addition, of relevance to the study is that the Strategic Plan identifies how the Waterston and Blackbridge, North Bank sites have been sold to Egnedol for the development of the site as a centre for renewable energy excellence.

3.3 Swansea Bay City Deal

3.3.1 Swansea Bay City Deal

The Swansea Bay City Deal is a £1.3 billion investment fund to support economic growth across the South West Wales region. The City Deal targets the creation of over 9,000 new jobs and increasing the region's GVA by £1.8 billion.

The Swansea Bay City Region comprises the four south west Wales local authority areas: Carmarthenshire County Council, City and County of Swansea, Neath Port Talbot Council and Pembrokeshire County Council.

The City Deal is supported by funding from the UK Government, the Welsh Government, local authorities and other public-sector funding sources such as local health boards and universities.

The City Deal is focused around four key themes, all connected to the provision of enhanced digital infrastructure which are as follows:

- **The Internet of Economic Acceleration:** targets the delivery of an integrated, regional economic development strategy with a focus on identifying and delivering digital infrastructure.
- **The Internet of Life Science & Well-being:** targets the expansion of research and innovation infrastructure and digitally integrate healthcare.
- **The Internet of Energy:** focuses on energy innovation including marine energy and sustainable house building.
- **Smart Manufacturing:** supports the regional manufacturing economy and sets a target to align digital assets and R&D provision including introducing capability to specifically support R&D within the steel industry in Wales.



Figure 3 Swansea Bay City Deal

The City Deal specifically outline plans for eleven projects which have been designed to deliver on the above objectives.

- In Pembrokeshire, the **Pembroke Dock Marine** project⁸ aims to develop a centre for the marine energy, development, fabrication, testing and deployment to strengthen Wales’ blue infrastructure.
- In Carmarthenshire, plans for **the Llanelli Life Science and Well-being Village**⁹ comprises a life science research centre along with business development facilities, leisure facilities, and extra care housing to create one of the first developments of its kind.

3.3.2 South West Wales Regional Plan for Regeneration (2018)

The South West Wales Regional Plan for Regeneration, published in 2018 is a plan for the Swansea Bay City Region (Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea) which sets out the target areas and activities to be delivered through the Welsh Government’s Targeted Regeneration Investment Programme (TRIP) which builds on the previous Welsh Government funded Vibrant and Viable Places Programme (VVP).

Target areas for regeneration funding have been identified in the Plan including the following in Carmarthenshire and Pembrokeshire: Ammanford, Llanelli, Haverfordwest, Pembroke.

The Plan has four strategic aims:

- **Support the growth of local businesses:** The region suffers from a small business base, there are too few businesses and those we have are not growing quickly enough. It is important that our start-up and growing businesses are able to find suitable accommodation that fully meets their requirements.

⁸ <https://www.swanseabaycitydeal.wales/projects/pembroke-dock-marine/>

⁹ <https://www.swanseabaycitydeal.wales/projects/life-science-and-well-being-village/>

- **Increasing sustainable living:** There is a need to increase the number, and quality, of homes in target areas. This will meet the demand for additional housing, and improve vibrancy of these communities, increasing footfall and expenditure in the local economy, which will help to sustain local businesses.
- **Building vibrant communities:** The target areas provide important local service functions with access to employment, leisure, community and cultural facilities at their core. This mix of activities brings vibrancy to these communities and enhances their viability by helping to differentiate the offer from competing centres (including out of town developments).
- **Maximising the impact of regeneration investment:** The region suffers with issues of worklessness, low skill levels and business growth. Generating social benefits through Targeted Regeneration Investment Programme funded activities would help create employment and training opportunities for workless individuals and support local businesses by encouraging local sourcing.

3.3.3 Swansea Bay City Region Economic Regeneration Strategy (2013-2030)

The Swansea Bay City Region Economic Regeneration Strategy (2013-2030) is an economic growth plan of the City Region. The Strategy sets out a vision for the future of the City Region stating that by 2030, the region will be:

- A £13.1bn per annum economy with productivity at 90% of the UK level;
- Recognised both in the UK and internationally for its reputation in innovation and knowledge-based economic growth;
- A leading UK centre for advanced manufacturing and engineering, renewable energy and high-value service delivery;
- A distinctive and attractive place to live, study, work and recreate.

The Strategy sets out five strategic aims including the following:

- **Business Growth, Retention & Specialisation:** Supporting key organisations (Tata Steel, Valero, DVLA) as well as attracting developing and retaining higher value productive businesses and SMEs. Developing an increasingly specialised business base focusing on a small number of key sectors.
- **Skilled & Ambitious for long-term success:** Creating an integrated skills landscape, up-skilling the existing workforce as well as raising aspiration ambition and educational attainment.
- **Maximising job creation for all:** Increasing the availability and accessibility of employment opportunities and maximising job creation.
- **Knowledge Economy and Innovation:** Significantly improving skill levels, boosting the economic impact of research, technology transfer and commercialisation, and focusing on the critical conditions needed for 'smart growth' by focusing on certain areas.

- **Distinctive Places and Competitive Infrastructures:** Delivering high quality, personalised public services, ensuring a dynamic commercial land and property market, delivering high quality housing and Next Generation Access Broadband.

3.4 Adjacent to the Larger than Local Area

3.4.1 Local Growth Zones

Local Growth Zones follow a similar model to Enterprise Zones but are targeted specifically towards rural areas. Local Growth Zones (LGZ) have been designated by the Welsh Government to support jobs and stimulate economic growth in rural areas, whilst also ensuring development is sensitive to local circumstances and challenges e.g. lack of broadband connectivity in rural areas.

There are two designated Local Growth Zones in Wales, both of which are located in the mid and south west Wales region; the Powys Local Growth Zone and the Teifi Valley Local Growth Zone. Within the former, four centres have been identified as benefitting most from designation of an LGZ¹⁰:

- The Severn Valley (Welshpool/Newtown/Llanidloes);
- Rhayader/Llandrindod Wells/ Builth Wells
- Brecon/Bronllys/Talgarth (located within the BBNPA administrative boundary);
- Ystradgynlais.

3.4.2 Growing Mid Wales Partnership

The Growing Mid Wales Partnership (GMWP) is a partnership and engagement initiative between Ceredigion and Powys County Councils, the Welsh Government and other public and private sectors groups with an interest in the Mid Wales region¹¹.

The overarching vision of the GMWP is ‘to progress jobs, growth and the wider economy in the Mid Wales region.’ Whilst outside the ‘Larger than Local Study Area’, the aims of the partnership are as follows:

- Encourage interaction with businesses, higher and further education, and with public and private sector stakeholders;
- Identify key themes and sectors, and priorities for investment;
- Support business led innovation, enterprise and investment in Mid Wales
- Support the delivery of Powys Local Growth Zones, SIROLI and the Teifi Rural Growth Zone concepts;

¹⁰ <https://gov.wales/sites/default/files/publications/2019-05/welsh-government-response-to-the-powys-local-growth-zones-report.pdf>

¹¹ For a full list of members please see here: <https://en.powys.gov.uk/article/5547/Growing-Mid-Wales>

- Engage with the Central Wales Economic Forum and the Mid Wales Regional Tourism Forum.
- Secure wider collaborative and transformational working with key partners organisations and the business community;
- Agree roles, responsibilities and improved delivery arrangements in the promotion of economic development.

The Partnership outlines that it aims to be a ‘light touch’ mechanism to scrutinise challenge, identify opportunities and shortcomings and so initiate and propose interventions to achieve more and better results’ for the Mid Wales region¹².

Regional Initiatives

Swansea Bay City Deal represents an investment fund to support economic growth across the area which includes Carmarthenshire County Council and Pembrokeshire County Council. The City Deal is focussed around four themes, the internet of economic acceleration, life science and well-being and energy, alongside smart manufacturing.

Outside the ‘Larger than Local’ Study area, there are initiatives within neighbouring regions to the north which focus on rural growth.

Strategic Sites of Regional Importance

- **Enterprise Zone:** Haven Waterway, where the focus is on the energy and environment sectors. The EZ Strategic Plan identifies key priorities and objectives including the development of a Food Park at Withybush, continued development of a cruise sector, development of a Free Port post-Brexit, opportunities on the North Bank sites include Waterston and Blackbridge, and opportunities on the south bank including the Pembroke Dock Marine Project.
- **City Deal:** There are projects within the Study Area, including at Pembroke Dock Marine and Llanelli Life Science and Well-being Village.
- **Regional Plan for Regeneration:** Identifies targeted areas for funding within Carmarthenshire and Pembrokeshire include Ammanford, Llanelli, Haverfordwest and Pembroke.

¹² GMW (2015) Terms of Reference (final draft) available online at:
<https://en.powys.gov.uk/article/5547/Growing-Mid-Wales>

4 Local Context

4.1 Overview

The following review sets out the local context for the Pembrokeshire and Carmarthenshire Economic Strategy, including sites within the adopted and emerging Local Development Plan reviews. This section also includes a brief review of the local context of both Pembrokeshire Coast and Brecon Beacons National Park Authorities.

4.2 Pembrokeshire Local Development Plan

4.2.1 Currently Adopted Plan: LDP1

Pembrokeshire Local Development Plan (2013)

The Pembrokeshire Local Development Plan (LDP) was adopted in 2013 and has Plan Period of 2013-2021. It comprises a Written Statement, which sets out strategic policies (SP policies) and General policies (GN policies), and Proposals Map.

Strategic policies relate to specific land uses and/or specific area-based policies.

Policy SP7 relates to housing land and states that housing land has been allocated for the provision of 7,300 new dwelling with a target set for the delivery of 5,700 dwellings during the plan period. **Policy SP2** specifically relates to the county's two port sites and safeguards port and energy related development.

Larger than Local: Relevant Strategic Policies

Policy SP3 sets out the employment land requirements for the county, stating that 173 hectares of employment land is allocated across strategic and local employment sites. Strategic employment sites allocated within the LDP are shown in the table below:

Table 3: Pembrokeshire LDP Strategic Employment Allocations

Site Name	Area (ha)	Use Class
Blackbridge, Milford Haven	33.45	B1, B2, B8
Pembrokeshire Science and Technology Park, Pembroke Dock	22.38	B1
Withybush Business Park, Haverfordwest	20.61	B1
Trecwn	21.11	B1, B2, B8

Policy SP5 relates to the Visitor Economy and states that development proposals relating to the visitor economy will be supported in sustainable locations if they contribute to the diversity and quality of accommodation and attraction, respect the environment and would benefit local communities.

Policy SP12 sets out the county’s settlement hierarchy which is based on both functional characteristics and the availability of services and facilities. The Settlement Hierarchy is sub-divided into Hub Towns, Rural Settlements, Service Villages, Large Local Villages and Small Local Villages. Hub towns are split between two geographical areas; Haven Hub and North Pembrokeshire Hub which comprise the following settlements:

Table 4: Pembrokeshire LDP Settlement Hierarchy

Haven Hub Towns	North Pembrokeshire Hub Towns
Haverfordwest Milford Haven Pembroke Dock Pembroke Neyland	Fishguard Goodwick

In order to set out where certain types of development are likely to be acceptable within the settlement hierarchy, including employment allocations and employment development, policy SP12 also includes a development matrix which has been reproduced below.

Table 5 Pembrokeshire Settlement Hierarchy

Policy	Haven Hub Towns	North Pembrokeshire Hub Towns	Rural Towns	Service Centres	Service Villages	Large Local Villages	Small Local Villages
Housing Allocations							
Windfall Market Housing							
Local Need Affordable Housing							
Exception Sites for Affordable Housing							
Employment Allocations							
Employment sites through criteria-based policies							
Community Facilities – within or well-related to settlements							

Policy SP14 further relates to Hub Town and sets out that within hub towns development will encourage complementary relationships between hub towns in a sustainable way which includes promoting opportunities for new commercial, retail, tourism, leisure and community facilities.

Larger than Local Study: Relevant General Policies

Policy GN5 relates to non-strategic employment allocations which comprise the following:

Table 6: Pembrokeshire Adopted LDP Non-Strategic Employment Allocations

Site Name	Area (ha)
Merlins Bridge Creamery Extension	5.13
Withybush North of Business Park	6.09
Withybush East of Business Park	15.38

Site Name	Area (ha)
Haven Head Business Park Northern Extension, Milford Haven	3.82
Adjacent to Marble Hall Road, Milford Haven	6.86
Milford Haven Gas Storage Site	0.68
North of Honeyborough Industrial Estate	8.55
Goodwick – Former Diwhurst Factory	0.99
Goodwick- Parrog	0.60
Crymych – adjacent to Riverlea/opposite Llygad-yr-Haul	5.20
Celtic Link Business Park, near Scleddau	13.47
A4115, Templeton	2.88
Old Station Yard, Letterston	1.23
Carew Airfield	5.60
Rushacre Enterprise Park Extension	1.32

Policy GN16 is related specifically to Visitor Attractions and Leisure Facilities and states that they will be permitted where they are accessible, in close proximity to a settlement or compatible with its location.

4.2.2 LDP1: Evidence Base

The LDP and the Pembrokeshire Economy (2010) Background Paper

The LDP Economic Development Background Paper draws together the individual evidence base documents which underpin economic development policies. Alongside responses made to LDP Stakeholder Consultation and comprehensive reviews undertaken by the County Council’s Economy Overview and Scrutiny Committee, the Paper reviews key evidence base documents as including:

- **Economic Overview and Scrutiny Committee Reviews:** These were undertaken of key sectors of the economy to inform the LDP, including Tourism, Business Support, Energy, ICT and Broadband and Marine industry and leisure.
- **Haven Spatial Plan Area Complementarity Study:** Recommends the need to build on:
 1. Haverfordwest’s key role in broadening the economic base of the spatial plan area and building on its strength as an administrative centre, and function as a transport hub;
 2. Exploring opportunities for developing Research and Development / high technology sectors, including drawing on Haverfordwest’s proximity to Pembroke Dock and the energy sector at Milford Haven, including exploring further and higher education links to the University and the hospital;
 3. Commercial Leisure opportunities including at the proposed Martello Quays marina / Waterfront scheme at Pembroke Dock and the existing marina at Milford Haven;

4. Pembroke's role as a specialist retail centre, linked to its leisure and tourism function;
5. Milford Haven's location for housing leisure and employment, recognising the need for contraction of its retail function to focus on serving the convenience needs of the immediate population and regeneration the local centre with improved connections between the retail centre and the Marina / Havens Head and improved role as a niche provider of leisure entertainment and an improved evening economy;
6. The Fishguard / Goodwick Hub's key role as a key gateway to Ireland, as part of the trans-European transport network and as a local tourism and service centre;
7. The promotion of value-added spin off activities such as the agriculture Mart role of Crymych, and speciality retailing in Narberth; and,
8. New development for rural communities directed towards the day to day needs of existing communities.

Within the LDP Background Paper, a number of strategic sites were identified, based on the area's locational advantages of the geography, port infrastructure and high-quality environment. Deepwater access and relative proximity to Midlands markets offer future development potential for containerised transport from southern Europe were also cited as justification behind the strategic sites. These include:

- **Pembroke Dockyard** (21.27ha site), provides support land to the Port of Pembroke and the Irish Ferries Port. The Paper identifies opportunities associated with the site as including ship repairs, renewable energy related, general cargos (marine diversification).
- **Pembroke Power Station** (195.10ha site), occupied by a 2000MW gas-fired power station. The background Paper identified that the development of the power station will release parts of the site for development to utilise surplus heat produced on site.
- **Chevron Oil Refinery**¹³ (215.3ha site), which is occupied as an oil refinery with deep water jetties.
- **Former RNAD: Blackbridge** (5.96ha site and adjoining land to 33ha), which has been the subject of previous developer interest for energy fuel production – it is the Haven's last deep-water development site.
- **Waterston (Dragon LNG)** (177.2ha site), which is fully occupied as an oil storage depot, LNG terminal and 45mw gas fired CHP plant.
- **South Hook LNG** (209.30ha site) which has been recently developed as the South Hook LNG terminal.
- **Milford Haven Refinery**¹⁴ (123.7ha site), which is fully occupied as an oil refinery which is serviced by deep-water jetties near Gelliswick.

¹³ Now Valero Oil Refinery

¹⁴ Now Puma Energy Storage Facility

- **Withybush Business Park** (20.61ha site), which is a brownfield site that has been fully-serviced and recognised as having an opportunity for good quality business use.
- **Cleddau Bridge Pembrokeshire Science and Technology Park** (22.42ha partially brownfield site), which hosts the Pembrokeshire Technium Business Innovation and Growth Centre¹⁵. The site provides opportunities for R&D and high-value manufacturing.
- **Trecwn** (21.11ha site): Former-explosives storage and maintenance facility comprises 25,000 sqm of buildings and storage tunnels. This is a vacant site which has been maintained in a good condition.

Employment Land Study (2011)

The latest employment land study (ELS) for Pembrokeshire was published in 2011 and formed part of the evidence base for LDP1. The key messages from this ELS are summarised below.

The ELS states that apart from schemes in relation to energy and port-related activities the majority of business activity in the area relates to SMEs.

The ELS is split by area and as such the major employment sites within the county can be readily identified. The table below shows the main employment sites over 10ha identified in the ELS by key settlement. It also includes the area of undeveloped land/buildings as of 2011.

Table 7: Summary of site area/undeveloped land by key settlement as per ELS (2011)

Area	Site Name	Total Area (ha)	Area of undeveloped land/buildings in 2011 (ha)
Pembroke and Pembroke Dock	Former Pembroke Power Station	195.10	0.00
	Pembrokeshire Science and Technology Park	22.42	18.19
	Royal Dockyard	21.27	1.81
Haverfordwest (including Merlins Bridge and Withybush)	Withybush Business Park	14.49	14.03
	Withybush East of Business Park	12.28	7.20
	Withybush North of Business Park ¹⁶	6.09	5.34
	Withybush Business Park Extension ¹⁷	1.53	1.47

¹⁵ 'Technium' was a concept for business incubation facilities promoted by the then Welsh Development Agency. The Pembrokeshire Science and Technology Park is still in existence but the term Technium is no longer used.

¹⁶ It is noted that this site is not over 10ha however has been included given that it forms part of a cluster of sites around Withybush Business Park.

¹⁷ As above

Area	Site Name	Total Area (ha)	Area of undeveloped land/buildings in 2011 (ha)
	Withybush Industrial Estate Sites A-E	12.71	1.1
Fishguard and Goodwick (including Scleddau and Trecwn)	Celtic Link Business Park	13.31	5.83
	Former RNAD, Trecwn	21.11	21.11
Milford Haven and Waterston (including South Hook LNG terminal)	South Hook LNG Terminal (former Esso refinery)	209.30	0.00
	Thornton Industrial Estate	22.07	5.46

The ELR indicates that employment land in Pembrokeshire is in highest demand around the Port and the Haven Waterway. In 2011 there was a very high take up of land around Milford Haven and at the former Pembroke Power Station at Pembroke Dock. This suggests that even when large strategic sites become vacant in these areas e.g. former power station site, former Esso refinery, other uses generally look to take over the entire site areas.

Pembrokeshire County Council Local Development Plan Annual Monitoring Report (2017/2018)

The latest Annual Monitoring Report (AMR) for PCC was published in late 2018 for the year 2017/2018, it is the local authority's fifth AMR and monitors plan progress.

In terms of employment and employment land the latest PCC AMR states that LDP monitoring targets for employment land are generally being met with various sites and buildings having been developed for employment purposes since LDP adoption. In terms of **strategic employment sites** however delivery has been much slower than anticipated according to the AMR which has triggered further investigation at Blackbridge and Trecwn Strategic Employment sites. The most recent application at Blackbridge for a Biomass facility was refused by Welsh Ministers (DNS application) but may be resubmitted at a later date.

4.2.3 Emerging Local Development Plan: LDP2

Pembrokeshire County Council Emerging Local Development Plan – Preferred Strategy

The Pembrokeshire LDP 2 is currently under review in preparation for the updated LDP (2017-2033). A Deposit LDP is expected to be published for consultation in October 2019. In preparation for the LDP2, PCC has published a Pre-Deposit Preferred Strategy and has begun to compile an updated evidence base.

The Preferred Strategy sets out a target for the following levels of growth within the county for the period 2017-2033:

- 6,800 new homes; and
- 2,200 new jobs.

Paragraph 5.6 states that the figure of 2,200 new jobs has been identified through the use of Experian GOAD data. Paragraph 5.7 sets out that the LDP2 will ensure that through varied policies as well as specific land allocations, appropriate opportunities for economic growth are identified, accounting for external uncertainties such as the UK's planned exit from the European Union ('Brexit').

Draft policy SP5 of the preferred strategy relates to the settlement hierarchy which remains the same as policy SP12 of the adopted LDP (see above) with the exception of the 'small local villages' classification being removed.

Strategic Employment Sites to be allocated within the LDP2 have not yet been identified but the Preferred Strategy documents that these are likely to be identified in the following key locations: Trecwn, Milford Haven and Pembroke Dock (including sites related to the waterway) and Haverfordwest.

Strategic policies in relation to port development and the visitor economy have also been taken forward into the Preferred Strategy and remain broadly the same as the respective policies (SP2 and SP5) within the adopted LDP.

4.2.4 LDP2: Emerging Evidence Base

Pembrokeshire County Council LDP2 – Economic Profile of Pembrokeshire (2015)

In support of the evidence base for the LDP2, in 2015 PCC published an 'Economic Profile of Pembrokeshire' report which provides a statistical background and SWOT analysis of the region's economy. The key sectors identified within the report include; tourism, energy and the marine economy, the rural economy and business services.

In terms of recommendations arising from the SWOT analysis, the report concludes that the County should prioritise the development of the following; transport and infrastructure improvements, business development and planning, improvements in training/skills; and engagement and future strategic development.

Pembrokeshire County Council LDP2 – Local Employment Trends Background Paper (2018)

As mentioned above, an evidence base is currently being prepared to support the preparation of PCC's LDP2, which include the Local Employment Trends Background Paper (2018).

The paper utilises Experian Goad data (2018) on employment forecasts to analyse possible trends and future scenarios. The model takes into account industry, regional and local developments and assumes a 'soft' Brexit i.e. a largely business as usual approach to existing trading relationships. The key themes emerging from the analysis carried out are summarised below:

Table 8 Summary of Pembrokeshire Local Employment Trends

Focus	Summary
Employment Trends	<ul style="list-style-type: none"> • Public sector jobs account for the majority of employment in Pembrokeshire which is expected to grow; • The balance within the public sector is expected to change between 2017-2033 with an overall decline in education but an increase in health, residential care and social work-related employment; • The second largest sector in terms of employment in Pembrokeshire is the Accommodation, Food Services and Recreation Sector which according to Experian data is expected to grow in terms of employee numbers and GVA in the 2017-2033 plan period.
GVA	<ul style="list-style-type: none"> • The two most significant sector in terms of Pembrokeshire’s overall GVA are Public Services (worth £445.4 million GVA in 2017) and Professional and Other Private Services (worth £490.6 million in 2017). • Both of the above sectors are expected to grow in the period to 2033 with Public Services being worth £594.1 million in 2033 and Professional and Other Private Services being worth £596.6 million in 2033. • Manufacturing is expected to decline in value between 2017 and 2033 but will remain important in terms of GVA, estimated to be worth £283.4 million in 2033.
Labour Market	<ul style="list-style-type: none"> • Demographic data estimates an ageing population in Pembrokeshire over the LDP2 plan period with younger age demographics (16-64) declining and increasing older population (65+). This is anticipated to have a knock-on effect on the labour market. • Experian data suggests a small decline in the size of the labour force 2017-2033 with demand side projections showing a demand for 2,200 new jobs over the LDP2 plan period. • A disparity was identified between projected residence-based employment and workplace based employment figures which suggests a continued net-out commute for those in work.

4.3 Carmarthenshire Local Development Plan

4.3.1 Current Adopted Plan: LDP 1 (2006-2021)

The Carmarthenshire LDP was adopted in 2014 and has a plan period of 2006-2021. Similar to Pembrokeshire, the LDP comprises a Written Statement and Proposals Map.

Larger than Local: Relevant Strategic Policies

Strategic **Policy SP3** sets out Carmarthenshire’s Settlement Framework. Growth areas are identified in Carmarthen, Llanelli and Ammanford/Cross Hands. Growth Areas are established urban centres which are considered to be sustainable settlements which a high degree of accessibility. The Growth Areas are supplemented by Service Centres and Local Service Centres which are arranged in the Settlement Hierarchy owing to their merits in terms of sustainability and access to services and facilities.

Policy SP4 details strategic site allocations within the County which have been allocated for employment, housing or mixed-use development. The Strategic Sites are as follows:

Table 9 Carmarthenshire Adopted LDP1 Strategic Sites

Strategic Site	Proposed Use	Employment Area (ha)
Site 1 - West Carmarthen	Mixed Use	5.45
Site 2 - Pibwrlwyd, Carmarthen	Mixed Use	15.50
Site 3 - South Llanelli Strategic Zone		
Delta Lakes	Mixed Use	9.78
Machynys	Mixed Use	No employment allocation
The Avenue	Housing	No employment allocation
North Dock	Mixed Use	No employment allocation
Old Castle Works	Mixed Use	No employment allocation
Site 4 – Dafen, Llanelli	Employment	22.80
Site 5 – Cross Hands Strategic Zone		
Cross Hands West	Mixed Use	0.79
Cross Hands East	Employment	9.22
Cross Hands West Food Park	Employment	8.91

Policy SP7 includes all employment allocations including those on strategic sites (as listed in the above table). This is split between allocations located within Growth Areas and smaller allocations located in tier 2-4 settlements.

Policy SP15 is focused on Tourism and the Visitor Economy. It sets out a hierarchy for tourism related development as follows:

- Within the development limits of Growth Areas and Service Centres - major tourism proposals, including high level traffic generators;
- Within the development limits of Local Service Centres and Sustainable Communities – smaller scale proposals which reflect the character of the area which are appropriate in terms of size, scale and impact

- Open Countryside – small scale location specific developments that must satisfy policy TSM3, except where they are subject to the provisions of TSM2 and/or TSM5.

Larger than Local: Relevant Specific Policies

In addition to strategic policies, the LDP also includes specific policies. The specific policies considered to be of most relevance this ‘larger than local’ study have been summarised as:

- **Policy H10** specifically relates to proposals related to home working, evidencing the large proportion of the County’s population that work from home.
- **Policy EMP1** is in relation to the safeguarding of employment sites to ensure that they remain protected from alternative uses.
- **Policy EMP2** is in relation to new employment uses stating that these will be permitted where they are within, adjacent to or directly related to development limits and where certain development criteria can be met.
- **Policy EMP5** relates to mixed use sites, including strategic sites as per policy SP4 (see above). On certain sites e.g. the former DRAKA works, policy EMP5 states that small scale employment uses may be appropriate although this is not what the land has not been specifically allocated for this use.

Inspector’s Report on the LDP 1 (September 2014)

In relation to Employment Land Provision, the Inspector considered the emerging TAN 23 guidance and the Employment Land Study (2010). It was recognised that some areas have large historical allocations, which are in sustainable locations and supported by infrastructure, but which were not in demand for other uses.

Carmarthenshire undertook a review of employment land during the examination, which assessed whether the allocated sites would be in line with market requirements. This resulted in a proposed reduction in the number and scale of employment allocations, or level of employment uses on mixed-use sites, given the lack of certainty regarding the deliverability of these sites during the Plan period.

4.3.2 LDP1: Evidence Base

Carmarthenshire Local Development Plan Annual Monitoring Report (2017/2018)

The AMR states that the revised LDP should consider compatibility with the Swansea Bay City Deal given that the City Deal projects will be a ‘notable informant in any future land use policies or proposals.’

In terms of strategic employment site allocations, the AMR concludes that strong progress has been made in site delivery. The Swansea Bay City Deal being signed provides further certainty and confidence in the delivery of Delta Lakes as the

Llanelli Wellness and Life Sciences Village, a City Deal led project. Planning permission had not been granted at the time of the AMR's publication, but has now been approved.

At the Dafen, Llanelli site 1.87ha of the total allocation has been developed as an Air Ambulance facility with the AMR acknowledging that the rest of the site could benefit from further infrastructure provision and the upgrading of existing access road prior to further development.

An outline planning permission and reserved matters application have been approved at Cross Hands East for the development of business and industrial units across the whole 19ha site. A total of 4.44ha of development has been delivered and is now fully operational at Cross Hands West Food Part with the majority being operated by Castell Howell foods.

In light of the above, AMR monitoring targets for employment land have been met.

4.3.3 Emerging Local Development Plan: LDP2

Carmarthenshire Emerging Local Development Plan – Preferred Strategy (2018-2033)

Carmarthenshire is currently preparing an updated Local Development Plan to cover the period between 2018 and 2033. A Preferred Strategy document was published in February 2019 which is the first formal draft of the emerging LDP and includes a draft updated strategy and draft strategic policies.

The Strategy for the LDP outlined in the Preferred Strategy document sets a target for the provision of a minimum of 5,295 new jobs within the County with the provision of sufficient employment land to support this job creation and economic growth. It details that this employment would be provided through employment site allocations and policy provisions and should be sensitive to the need to both sustain and enhance rural economies. The Growth Zones identified remain the same as the current LDP with growth being focused on the urban centres of Carmarthen, Llanelli and Ammanford/Cross Hands.

The Strategy states that as part of its wider Corporate Strategy, Carmarthenshire County Council has placed a focus on regeneration reflected through the Swansea Bay City Deal and the Carmarthenshire Regeneration Plan. The Preferred Strategy states that it has been developed to reflect this through providing policies related to strategic growth.

Larger than Local: Relevant Strategic Policies

Linked to this is draft strategic **Policy SP1** which states that 'the LDP will provide for the future growth of the economy and housing requirement through the provision of 10,480 new homes to meet the identified housing requirement of 9,887 (and) a minimum of 5,295 new jobs.'

Draft strategic **policy SP5** relates to Strategic Sites which are so defined due to their contribution to delivering the future growth requirements for Carmarthenshire (see policy SP1 above) and due to their relationship with the Swansea bay City Deal. The strategic sites identified are:

- The **Llanelli Life Science and Well-being Village**, for which the focus is on creating a physical village providing facilities and services which promote and improve well-being, integrate business development, education, healthcare, leisure, tourism, wellness support and research in life-sciences in one location and deliver transformational social and economic benefits.
- **Yr Egin Creative Digital Cluster in Carmarthen**, a new digital and creative cluster in Carmarthen, provide start up and development space for creative and digital companies and promote the Welsh Language.

Employment and the Economy is further addressed by draft strategic **policy SP6** which states that ‘sufficient and appropriate land will be allocated for the provision of employment opportunities for the Plan period in accordance with the Plan’s Spatial Strategy/Settlement framework.’ An exact figure for the amount of land to be allocated has not yet be identified.

Larger than Local: Relevant General Policies

Policy in relation to the Visitor Economy has been included within the Preferred Strategy. Draft strategic **policy SP10** states that proposals for tourism related development will be met where they are determined to add value to the visitor economy, preserve the existing social, environmental and economic fabric of the County for future generations and are considered to be sustainably located.

4.3.4 LDP2: Evidence Base

Carmarthenshire Strategic Regeneration Plan (2015)

A Strategic Regeneration Plan for Carmarthenshire was developed in 2015 and has a plan period from 2015-2033. The Plan has been developed within the context of the Swansea Bay City Region.

The Plan is primarily focused on strategic sites and key settlements. The strategic regeneration sites identified by the Plan include the following:

1. **Delta Lakes:** the site of the Llanelli Wellness and Life Science village, the project will bring together healthcare and research uses with sheltered accommodation and public open space.
2. **The Beacon:** described within the Plan as being home to some of the top companies in Carmarthenshire The Beacon is an Enterprise Centre located in Llanelli and within the Plan is identified as having the potential to attract specific business sectors such as Advanced Manufacturing and Life Sciences.
3. **Cross Hands Food Park:** this Site is focused on food technology and is described within the Plan as an ‘employment hotspot’ for the food industry in

South Wales. It is also considered to be a critical part of the wider Cross Hands Growth Zone.

In terms of Primary Towns, as within the LDP, these are identified as Carmarthen, Llanelli and Ammanford/Cross Hands.

Employment Sector Study (November 2017)

The overall focus of the Employment Sector Study was to review employment needs by sector and the implications of this on land requirements. The Employment Sector Study review reviews the key transformational projects within each of the growth areas:

Table 10 Key Transformational Projects identified within the Employment Sector Study

Summary	Key Transformational Projects
Ammanford	Key transformational projects in Ammanford include transport improvements, investment in employment space and gateway sites, and a Taskforce that has an overall ‘action plan in place to focus on key buildings, sites and premises.
Carmarthen	<ul style="list-style-type: none"> • Yr Egin, a new media and culture hub on the University of Wales Trinity Saint David campus, home to S4C. • Carmarthen West, where infrastructure improvements are planned to increase accessibility to Yr Egin, alongside an additional 1,200 new homes. • Pibwrlwyd College Campus, which represents a key area for future employment growth in Carmarthen. The site offers potential for the consolidation and re-development of the existing elements of Carmarthenshire College and a business park.
Carmarthenshire Coastal Belt	The three main longer-term priorities for the Llanelli Waterside Joint Venture are Delta Lakes, North Dock and Burry Port with investments planned in sites for business, commercial, leisure, recreational, retail and residential use.
Cross Hand Growth Zone	<ul style="list-style-type: none"> • Cross Hands Growth Zone is closely linked with both the food and advanced manufacturing sectors. It has been identified that an ‘anchor’ tenant in the Green Sector is essential, as are generous central government subsidies, to ensuring the success of Cross Hands. • The sectors being targeted as part of the marketing campaigns are Energy and Environment, Creative, Advanced Manufacturing, Financial and Professional as well as Agri-Food Technology. • There are five development zones identified in the Cross Hands Growth Zone: • Food Zone (Cross Hands Food Park), enhancing the food park and capitalise on significant investment made to date; • Business Zone (Cross Hands Business Park), which comprises a 38ha of mixed use development, which had space for further retail and commercial growth; • Employment Zone (Cross Hands East Strategic Employment Site), where the site is planned to accommodate businesses in key sectors, such as life sciences, financial and professional, advanced manufacturing, environmental, creative and agri-food technologies.

Summary	Key Transformational Projects
	<ul style="list-style-type: none"> Mixed Use Zone (Cross Hands West), which comprises a 21ha mixed use employment site. Residential and Mixed-Use Zone (Emlyn Brickworks), which comprises a mixed-use redevelopment that includes proposals for 250 homes on a 21 hectare site.
Llanelli	Beyond significant recent investment in the form of the Wellness Village at Delta Lakes, initiatives have recently included the development of a BID area which a £700,000 loan fund made available.
Rural areas	Identified that the rural economy has a significant influence on wider regeneration objectives.

By replicating the methodology used in the 2010 Employment Land Study, the ESS sought to calculate employment growth over two-time horizons (2017 – 2032 and 2017 – 2037) across all nine Government Priority Sectors. The ESS calculated that up to 127ha of employment land would be required to be delivered in Carmarthenshire by 2032 in order to accommodate the forecasted employment need of 18,681 new jobs

Although these growth aspirations have since been tempered by additional work undertaken by CCC on population growth models, the ESS considered that with Carmarthenshire aiming to diversify into several sectors, such as the creative industries and life sciences, provision of land in key areas is a priority. The main recommendations from the Study were as follows:

- It is important to consider employment and separate allocations in traditional sectors and industries, such as the manufacturing industry, which will continue to play a major role in Carmarthenshire’s economy;
- If most of Carmarthenshire’s strategic sites are dedicated to the digital, life sciences and creative industries, there will be restricted supply to meet the demand for traditional industries in some key areas of the county; and
- The growth in the new, high value sectors will also indirectly increase the demand for supporting traditional industries. This therefore adds to the case for more B2 land use allocation and there are clear supply deficits in the main urban areas of Llanelli, Carmarthen and Ammanford and also in the three rural areas of the Tywi, Taf and Teifi valleys.

The review did also consider that an alternative would be to restrict employment land to key areas and to improve transport access to these sites.

Employment Land Review (2018)

The latest Carmarthenshire Employment Land Review (ELR) was published in 2018 and has a survey baseline date from 1st April 2017 – 31st March 2018. The ELR assesses both the take up and availability of employment land across the County since LDP adoption (2014).

The latest Carmarthenshire ELR surveyed 114 sites in total. It reports that the total site area of land identified for employment purposes in 2018 was 445ha. Of this total figure the amount of land specifically for employment services (B1, B2 and

B8 and other) amounted to 107ha. Additionally, it confirms that the adopted LDP allocates 113.13ha of employment land (for B1, B2 and B8 uses).

The LDP monitoring target for employment land in the county is that the 113.13ha of land referenced above should be developed throughout the plan period (2006-2021).

During 2017/2018 the take up on existing employment sites amounted to 3.63ha, on allocated sites take up stood at 2.71ha. Combining the latter figure with sites already with planning permission in previous monitoring years, the total take up on allocated land to 2018 is 30.06ha. This means that the interim LDP monitoring target of 25% of allocated land obtaining planning permission has been met.

In terms of take up by location, the three Growth Areas of Carmarthen, Llanelli, Ammanford/Cross Hands made the biggest contribution to the total site areas, representing a 62% take up during the plan period (to 31st March 2018). The allocated sites which performed the best were located in Cross Hands with the entire allocation at both Cross Hands Business Park and Cross Hands East receiving planning permission during the plan period to 2018. This may be a function of the specialised nature of these sites for manufacturing.

The ELR acknowledges that at the time of adopted LDP's examination, the Inspector did raise concerns that employment sites allocated within the UDP had not been developed. This led to a reduced number of sites being allocated for employment purposes within the adopted LDP and the ELR states that deliverability will remain a 'key driver' in the preparation of the updated LDP

4.4 Pembrokeshire Coast National Park Authority Local Development Plan

4.4.1 PCNPA Adopted Local Development Plan (2010)

The Pembrokeshire Coast National Park Authority (PCNPA) Local Development Plan (LDP) was adopted in 2010 and has plan period of 2010-2021.

Policies 2-5 relate to the settlement hierarchy and the priority locations for growth. Tenby is identified as both a Local Centre and Tourism Centre whilst Newport, Saundersfoot, and St David's are also identified as Local Centres. All Local Centre policies identify the need to provide for employment development to meet the needs of the local area. In both Newport and St David's policy specifically mentions providing live/works unit in the city.

Policy 20 (Scale of Growth) is a Strategy Policy which states that "development which aims to meet the needs of the local population with priority being given to the delivery of affordable housing needs where this is compatible with the National Park designation" will be supported.

Policy 35 specifically relates to the Visitor Economy, and states that the aim of the policy is to attract visitors outside of the peak season whilst ensuring that the National Park environment is conserved and enhanced as a landscape of national importance.

Employment and employment sites are addressed by Strategy Policy 42. It states:

- Employment opportunities will be provided and safeguarded through small scale employment sites identified in St David's;
- Directing small-scale employment proposals to appropriate locations in the Local Development Plan's identified Centres or buildings suitable for conversion in the Countryside;
- Combining business uses with other uses such as community facilities or housing including live/work units; and,
- Protecting existing employment sites for employment use; and protecting and enhancing existing working harbours.

This policy is strengthened by policy 43 which relates to the protection of employment sites and sets out that permission will be only be granted to redevelop employment sites where certain criteria can be met.

There is one allocated employment site within the PCNPA LDP, this is the site known as 'South of St David's Assemblies', St David's where 0.93 hectares of employment land has been allocated.

4.4.2 Emerging LDP: Pembrokeshire Coast National Park Authority Deposit Local Development Plan (2018)

The PCNPA LDP (2010) has been reviewed and revised. The Deposit Local Development Plan is currently being examined by the Planning Inspectorate. The

formally adopted LDP, currently known as LDP2 is due for publication in late 2019 and once adopted it will have a plan period from 2018-2033.

The Deposit LDP is arranged under the same seven headings as the currently adopted LDP (see above). Policy 1, National Park Purposes and Duty is the overarching Strategy Policy. This is followed by the settlement hierarchy which remains the same as the adopted LDP with Tenby identified as a Local and Centre and Tourism Centre and Newport, Saundersfoot and St David's as Local Centres. Policy references to live/work units have been removed in the Deposit LDP which instead states that it will be a priority in Local Centres 'to permit proposals for small scale employment development to meet the needs of the local area (see Policy 44).'

Policy 21 (Scale of Growth Strategy Policy) has been expanded to state:

“Where compatible with the National Park designation: a) The development of shore-based facilities within the developed areas of the coast will be permitted. Marina development is not considered appropriate on this sensitive coast, b) Provide for and or permit small scale employment proposals, c) Provide for and or permit housing, to facilitate the delivery of affordable housing needs. In addition, priority will be given to the delivery of affordable housing needs over other uses in certain circumstances, d) Permit waste facilities which predominantly serve the National Park, e) Consider small scale renewable energy.”

The criteria under policy 39 (The Visitor Economy) has been altered within the Pre-Deposit LDP however the policy introduction remains the same as the adopted LDP.

Policy in relation to Employment Sites remains the same as the currently adopted LDP with a new criterion added to the existing policy, to include 'allowing extensions to established businesses and giving favourable consideration to new businesses aiming to join existing clusters in the countryside.'

There are no specific employment site allocations included within the PCNPA Deposit LDP.

4.5 Brecon Beacons National Park Authority Local Development Plan

4.5.1 BBNPA Adopted Local Development Plan (2013)

The Brecon Beacons National Park Authority (BBNPA) LDP was adopted in 2013 and has a plan period from 2007-2022.

Policy SP2 relates to major development within the National Park and sets out that this should only take place in exceptional circumstances.

Policy SP12 Economic Wellbeing sets out that development proposals which are aimed at improving the economic social well-being of the National Park's communities will be permitted where certain criteria are met including, being located in areas which minimise the need to travel, providing employment opportunities within the Primary and Key Settlements, supporting sustainable tourism, town centres. Farm shops, rural enterprise and the agricultural sector and where they provide employment opportunities with green services.

This policy is followed by general economic policies including policies related to employment land requirements and employment sites. There are five allocated employment sites within the Brecon Beacons LDP which are as follows:

Table 11: Brecon Beacons National Park Employment Allocations

Site Name	Settlement	Size (ha)
Land at Brecon Enterprise Park	Brecon	0.8
Land Opposite High School, North of Hospital (Mixed Use Site)	Brecon	0.5 allocated for employment uses
Land adjacent to Hay Road	Talgarth	0.6
Former Mid Wales Hospital	Allocated brownfield site	0.35
Former Army Camp, Cwrt-y-Gollen (Mixed Use)	Allocated brownfield site	1.4 allocated for employment uses

The policy also includes detail of a committed site at land adjacent to 5th Avenue, Hirwaun Industrial Estate which is located at the boundary of BBNPA and Rhondda Cynon Taf local authorities and comprises 5ha of employment land within the National Park.

Policy SP10 relates to the sustainable distribution of development and sets out that this will be achieved through the detailed policies which relate to each level of the Settlement Hierarchy. Within the settlement hierarchy Brecon is defined as a primary key settlement with other key settlements being defined as Crickhowell, Hay-on-Wye, Sennybridge and Defynnog and Talgarth.

4.6 Brecon Beacons National Park LDP2

4.6.1 Preferred Strategy (2019)

The Brecon Beacons National Park LDP is currently under review and once adopted, will have a plan period of 2018-2033. The National Park Authority has published a Preferred Strategy which is currently out to consultation (closing 29th August 2019).

The Preferred Strategy document currently includes draft policies centred around four key themes which reflect those contained within PPW10: Strategic and Spatial Choices, A Distinctive and Natural National Park, An Active and Social National Park, A Productive and Enterprising National Park. Under the heading of ‘a productive and enterprising national park’ draft policies have been developed in relation to economic well-being, sustainable tourism, employment land requirement and safeguarding existing employment sites which are all relevant to this ‘larger than local’ economic study.

Under economic well-being the Preferred Strategy echoes the adopted LDP by stating that employment opportunities should be focused in the key settlements of Brecon, Crickhowell, Hay-on-Wye and Talgarth. It also provides an indication of those sectors which are considered to be of particular importance within the national park by confirming that proposals for sustainable tourism, rural enterprise and renewable energy generation/carbon minimisation schemes would be supported.

The Preferred Strategy sets out that sustainable tourism proposals would be supported where they ‘promote opportunities for the enjoyment and understanding of the National Park whilst ensuring their contribution to the conservation of the Park’s natural beauty, wildlife and cultural heritage.

The Preferred Strategy does not propose specific employment allocations and instead states that the eventual LDP2 will provide a ‘range and choice’ of economic development land to facilitate sustainable development whilst also safeguarding land for employment uses at existing sites such as Brecon Enterprise Park and Gilwern Park Industrial Estate.

4.6.2 LDP2 Evidence Base

Brecon Beacons National Park Employment Land Review (2019)

The BBNPA Employment Land Review (ELR) was published in 2019 and is intended to inform the economic policies and land allocations for the LDP2.

The ELR contains a wealth of background information in relation to market data and land uses within the National Park. For example it reports that in the 16 years since 2001, there have only been 95 planning approvals for B uses whilst there has been 245 planning approvals in relation to agricultural and tourism uses perhaps reflecting the economic make-up of the area.

The ELR sets up a Site Assessment Criteria matrix which was used to score both existing and allocated employment sites (nine existing sites and five allocated).

The sites were scored on basis of location, access, quality, market factors and local context.

The sites which scored the highest in the matrix developed were Land within Ffrwgrech Industrial Estate (0.28ha) and Land adjacent to the Cattle Market, Brecon both of which are in Brecon (0.83ha).

The ELR concluded on the basis of the matrix prepared that no current employment sites should be re-allocated or de-allocated for non-B class uses however the undeveloped existing employment allocations should be reviewed by the National Park Authority for the LDP2.

In terms of the quantum of employment land which should be allocated the ELR concludes that the LDP2 should allow for the provision of between 1.5ha to 3ha of employment land for B Class employment purposes which accounts for the fact that there is currently a surplus of employment land available within the National Park.

4.7 Conclusions

In terms of locally significant economic development initiatives and objectives, alongside the definition of Strategic Sites, the following can be concluded.

Table 12 Strategic Sites and Employment Sectors

	Pembrokeshire	Carmarthenshire
Existing Strategic Sites	<p>LDP and Pembrokeshire Economy Background Paper identified that allocated strategic sites are those based on the access to the area's locational advantages, including the port and defence infrastructure, high quality environment, Deepwater access to the Port and relative proximity to midlands markets and European trade routes. These are larger than 20 hectares and focus on the sectors of energy and oil refinery, and marine industries.</p> <p>Although sites are allocated for other uses (i.e. Withybush Business Park for good quality business use, and Blackbridge and Trecwn for their rare locational characteristics), these have not been developed. The AMR concludes that employment site delivery should be a key area for the LDP review to consider, given strategic employment site delivery has been much slower than anticipated.</p>	<p>Aside from a smaller allocation at West Carmarthen and a smaller allocation at Cross Hands West, existing 'strategic site' allocations are approximately 9-10ha or above.</p> <p>The AMR concludes that monitoring targets for employment land has been broadly met.</p>
Emerging Strategic Sites	<p>Strategic Employment Sites to be allocated within the LDP2 have not yet been identified but the Preferred Strategy documents that these are likely to be identified in the following key locations: Trecwn, Milford Haven and Pembroke</p>	<p>Draft strategic policy SP5 relates to Strategic Sites which are so defined due to their contribution to delivering the future growth requirements for Carmarthenshire (see policy SP1 above) and due to</p>

	Pembrokeshire	Carmarthenshire
	Dock (including sites related to the waterway) and Haverfordwest.	their relationship with the Swansea bay City Deal. These will relate to the Lanelli Life Science and Well-being Village, and Yr Egin Creative Digital Cluster in Carmarthen, however the exact amount of land to be allocated has not been identified.
Emerging Employment Sectors	<p>The key sectors identified within the report include; tourism, energy and the marine economy, the rural economy and business services.</p> <p>Challenges to growth include an expected decline in manufacturing, a reliance on public sector employment and an ageing population with an out-commuting population.</p>	The Employment Sector Study (November 2017) seeks to review employment needs against all Welsh Government Priority Sectors.

For the Brecon Beacons and Pembrokeshire Coast National Park Authorities, employment growth is managed through very small allocations (sub-1.4ha) or through criteria-based policies which seek to promote rural enterprise, sustainable tourism, opportunities in town centres and employment opportunities with green services.

5 Other Relevant Strategy Documents

5.1 Overview

Throughout the production of the Larger than Local evidence base, and through the collation of materials raised during engagement with key businesses and stakeholders within the Councils, a number of additional documents have been identified as being relevant to the Study. This reflects the Practice Guidance emphasis on identifying strategy drivers of change at a Larger than Local level.

5.2 Other Relevant National Strategy Documents

Welsh Government Strategy for Tourism (2013- 2020)

The role of the Strategy is to establish a vision and ambition for growth of tourism earnings by 10% or more by 2020. This will mean focussing on promoting the brand, product development, people development, profitable performance and place-building.

Tourism investment will focus on:

- Providing better product quality and range, to ensure that there is investment in better quality visitor facilities and all-weather visitor attractions, provide high-end and reputation changing hotels;
- There is scope to enhance the experiences of visitors to heritage attractions, museums and cultural venues to sustain their long-term viability;
- Increasing a successful season of festivals, where a range of options exist to cater for every adventurer;
- Increasing the reputation of the food and drink sector, including increasing the number of world-class food destinations and to promote and deliver quality Welsh food and drink as part of the overall visitor experience;
- Selectively support events that can enhance the reputation of Wales and exploring the meetings, conferences and events market of business travel which is relatively non-seasonal; and,
- Improving accessibility and travel of visitors without unnecessary restriction.

5.3 Other Relevant CCC documents

Carmarthenshire Destination Management Plan (2015 – 2020)¹⁸

The purpose of the Destination Management Plan is to provide a coordinated approach to visitor experience, growing visitor numbers and overnight stays and

¹⁸ <https://www.carmarthenshire.gov.wales/media/1212064/carmarthenshire-destination-management-plan-2015-2020.pdf>

spend within Carmarthenshire as part of a wider regeneration strategy for the County.

The Destination Management Plan identifies that Carmarthenshire lacks a clearly defined Brand identity, with a lack of wet weather facilities or compelling reasons to visit. A lack of well-established destination icons, sign-posting or coordinated approaches to both outdoor markets, cultural and heritage assets were also identified as key challenges.

Alongside promoting the brand, people development and profitable performance, priorities are focussed on place-building and product development which broadly include:

- Facilitating at least one new large-scale family attraction or facility to the County and encouraging existing attractions and activities to invest, expand and make improvements to their visitor experiences;
- Growing and maximising the County's reputation as a high-quality food and drink destination and increase the number, range and quality of events which have the potential to attract visitors in Carmarthenshire;
- Maximise the opportunities for outdoor activities throughout Carmarthenshire;
- Focus on key geographical places, using existing research undertaken by partners and key stakeholders;
- Finding ways to spread the benefits of tourism more widely in the local visitor economy, whilst adding depth to the sense of place by improving supply chain links; and,
- Supporting and maximising the potential of those community-level events which can enhance the visitor experience.

5.4 Other Relevant Pembrokeshire Documents

Strategic Regeneration Frameworks

BE Group, BDP and CBO Transport has prepared five Strategic Regeneration Framework documents on behalf of Pembrokeshire County Council to guide the regeneration of five town centres; Tenby, Pembroke, Pembroke Dock, Milford Haven, Fishguard and Goodwick:

- **Strategic Regeneration Framework for Fishguard and Goodwick (April 2019):** Key sites included the Chimney Link (creation of a site for residential, health and land use), New Town Square improvements and Goodwick Waterfront (this will focus on wildlife tourism, boat tourism, visitor accommodation, restaurant development and heritage attractions, alongside the Port of Fishguard).
- **Strategic Regeneration Framework for Milford Haven (July 2018)¹⁹:** Despite being a popular shopping destination for both local residents and tourists, the out-of-centre Haven Retail Park and Marina developments are the

¹⁹ https://www.pembrokeshire.gov.uk/objview.asp?object_id=6411&language=

greatest draws and the town centre is struggling. Alongside three priority sites at New Town Square, Milford Waterfront Development (which includes a masterplan for a 150-bed hotel) and Hamilton Terrace Gardens Enhancement, regeneration initiatives are likely to include: encouraging residential uses in town centres, utilising spaces for 'Made in Milford' branding and enhancing the quality / independent retail offer.

- **Strategic Regeneration Framework for Pembroke (February 2018)²⁰:** Flagship projects were identified as 6-10 Main Street (formerly occupied by Co-op), Castle Terrace / South Quay (a series of vacant buildings owned by Pembrokeshire County Council) and 1 Westgate Hill and Haven Church. These are considered to be projects which will increase activity levels in Pembroke, and to entice and lengthen visitor stays. The SRF requires the provision of small-managed work space which would provide the opportunity for local entrepreneurs to establish in the town.

Pembrokeshire Destination Management Plan (2013-2018)²¹

The Pembrokeshire Destination Management Plan focusses around five key objectives, which are:

- **Working together closely:** This includes establishing a core group of stakeholders to develop and engage with the Destination Pembrokeshire Partnership, continuing to develop communication links with and between tourism businesses and continuing to develop the monitoring of visitor satisfaction, enterprise and performance impact.
- **Refocusing marketing:** This will ensure a coordinated approach to marketing to the primary holiday markets, developing a strong image of Pembrokeshire that appeals to key market segments and continuing to develop consortia marketing activity. One aspect of this will be to exploit digital marketing opportunities through a digital marketing strategy.
- **Create a year-round high-quality experience:** This will be through developing the availability of good quality serviced accommodation (such as 3* and 4* establishments) and supporting the continual improvement and upgrading of self-catering accommodation, caravanning and camping. Alongside this, focus will be on the provision of year-round appeal and accessibility of places to visit, the development of better facilities for people with disabilities, developing a sustainable events programme and aiming to becoming a market leader in high quality land and water-based activity holidays.
- **Developing and sustaining infrastructure, environmental and cultural resources:** The fourth objective seeks to encourage sound environmental management at all levels, working with local groups who want to improve their communities and develop local distinctiveness, support sustainable land management and to improve and promote countryside access where

²⁰ https://www.pembrokeshire.gov.uk/objview.asp?object_id=6409&language=

²¹ <https://businesswales.gov.wales/dmwales/sites/dmwales/files/documents/pembrokeshire-dm-plan.pdf>

appropriate. This will also include developing a more coordinated approach to managing facilities and services used by visitors.

- **Improve business practice, profitability and performance:** The quality of the experience visitors encounter is significantly affected by the people they encounter in tourism businesses. Objectives will include tackling seasonality, developing business skills shortages and improving the appeal of jobs in local tourism and improving the co-ordination of provision and signposting of training.

5.5 Other Relevant Initiatives/ Sources of Funding

Table 13: Overview of existing funding sources within the Larger than Local study area.

Name of Initiative	Duration and Type of Funding	Organisation	Eligibility	Summary	Source of Funding
Targeted Regeneration Investment Fund ²²	2018-2021 Grant Funding	Welsh Government	Local Authorities working with partner organisations.	£100 million fund across 4 regions of Wales (including south west Wales) to support regionally significant regeneration investment proposals. E.g. The Property Enhancement Development Grant ²³	Welsh Government
Building for the Future Programme ²⁴	2017-2022 Grant Funding	Welsh Government	Local Authorities (who can work with partner organisations)	A £54 million fund for individual project proposals to improve town centres.	Welsh Government and ERDF
Coastal Communities Fund ²⁵	Ongoing Grant Funding	Big Lottery Fund	Local authority/public sector/private sector/ voluntary organisations/social enterprises and development agencies.	Funding for projects which create jobs in coastal areas.	Big Lottery Fund
Stalled Sites Fund ²⁶	Ongoing Loan funding	Development Bank of Wales	Residential developers	A £40 million fund to unlock development on stalled sites for residential development which cannot be progressed without traditional development funding.	Welsh Government

²² Welsh Government (2019) - https://gov.wales/sites/default/files/publications/2019-01/targeted-regeneration-investment-guidance_0.pdf

²³ <https://www.swansea.gov.uk/article/48531/South-West-Wales-to-benefit-from-27m-funding-boost>

²⁴

²⁵ Welsh Government (2019) - <https://gov.wales/coastal-communities-fund>

²⁶ Development Bank of Wales (2019) <https://developmentbank.wales/about-us/funds-we-manage>

Name of Initiative	Duration and Type of Funding	Organisation	Eligibility	Summary	Source of Funding
Wales Commercial Property Fund ²⁷	Ongoing Loan funding	Development Bank of Wales	SME developers in Wales	A £55m fund providing loans for developers looking at building new office/industrial property in Wales (including speculative builds)	Welsh Government
Wales Tourism Investment Funding ²⁸	Ongoing Loan Funding	Development Bank of Wales		A £50m fund designed to support individuals/developers creating stand out tourism projects which align with the priorities of the Economic Action Plan	Welsh Government
South West Wales Property Development Fund ²⁹	2009-2015 Grant funding	Carmarthenshire County Council	Developers	The SWW Property Development Fund was a fund for all SWW local authorities administered by CCC. It provided grant aid to developments to bridge the gap between costs of developing/refurbishing commercial property and its subsequent market value.	Local Authority and ERDF.
Carmarthenshire Property Development Fund ³⁰			Developers/Investors/Landowners and Owner occupiers for industrial commercial, community business, secondary food processing and B2B businesses.	Funding to bridge the financial costs between construction of commercial property and the finished market value.	

²⁷ Development Bank of Wales (2019) <https://developmentbank.wales/about-us/funds-we-manage>

²⁸ Business Wales (2019) <https://businesswales.gov.wales/tourism/finance#guides-tabs--1>

²⁹ National Assembly for Wales (2013) <http://www.assembly.wales/Research%20Documents/Funding%20and%20Information%20Small%20businesses%20-%20Constituent%20factsheets-13032013-208085/faq11-003-English.pdf>

³⁰ <https://www.carmarthenshire.gov.wales/home/business/funding/property-development-fund/#.XYEALShKhaQ>

6 Implications of the Literature Review

6.1 Overview

Based on the review of existing objectives and initiatives, it is necessary to understand the analysis of key definitions of strategic sites and sectoral opportunities which will be applicable within the Study Area.

6.2 Key Definitions

6.2.1 Study Area

The Technical Advice Note 23 Economic Development indicates that as market forces do not respect Local Authority boundaries, local planning authorities should work together jointly in regional groups to prepare economic evidence bases. The Practice Guidance *Building an Economic Development Evidence Base to Support a Local Development Plan (2016)* states that economic and property market profiles will need to be sub-divided geographically, as larger-than local areas can often be split into two or more local economies, property markets or Travel to Work areas.

Following a review of the background literature, there are several functional areas operating across the Study Area which are mapped in Appendix 3, including:

1. County boundaries and NPA boundary features;
2. NDF Region, Mid and South-east Wales;
3. Five Travel to Work areas³¹, including Cardigan; Haverfordwest and Milford Haven; Pembroke and Tenby; Swansea; and Llanelli;
4. Local affordable housing sub-market areas in Carmarthenshire; and,
5. Local objectives and initiatives, such as boundaries associated with the City Deal, Enterprise Zone or the regeneration priorities within the South West Wales Regional Plan for Regeneration (2018).

It is clear that there is no single boundary feature which is correct for undertaking the Larger than Local assessment. As Pembrokeshire do not have defined Affordable Housing Market areas, the Travel to Work areas do provide a consistent spatial container for assessment. In addition, as the objectives and initiatives and the NDF region cover areas much larger than the 'two counties', reference will only be made to these features where relevant.

The focus for the Study Area will therefore be the Travel to Work areas identified through the Census 2011.

³¹ ONS (2011) Travel to Work Areas December 2011 Boundaries (Ultra-generalised) based on Census 2011 information.

6.2.2 Definition of Strategic Sites

The definition of Strategic Sites is set out within existing literature as follows:

Table 14 Definition of Strategic Sites

	Adopted Local Development Plan Allocations	Emerging Local Development Plan Definition
National Development Framework		10ha and above
Pembrokeshire	20ha and above	Not defined, but Preferred Strategy identified that these would likely be in the following key locations: Trecwn, Milford Haven and Pembroke Dock (including sites related to the waterway) and Haverfordwest.
Carmarthenshire	9-10ha or above	Not defined, however the Planning Strategy identified these would be based on their contribution to delivering the future growth requirements for Carmarthenshire (see policy SP1 above) and due to their relationship with the Swansea Bay City Deal.
Pembrokeshire Coast	0.93 ha	Criteria-based policies
Brecon Beacons	0.35 – 1.4ha	Not defined.

Based on the review of background literature, ‘Strategic Sites’ therefore broadly include those which are larger than approximately 10ha.

However, although not over 10ha in size, there are a number of areas and sites which are linked to sector priorities and initiatives. These include spatially-clustered sites within areas identified by:

- The Swansea Bay City Deal (including the Pembroke Dock Marine, Llanelli Life Sciences and Well-being Village, or the Creative Digital Cluster at Carmarthen);
- Target areas for regeneration funding with the South West Wales Regional Plan for Regeneration (2018) (including Ammanford, Llanelli, Haverfordwest, Pembroke), City Deal or Enterprise Zone; or,
- The South West Wales Regional Plan for Regeneration (2018) Strategic Aims of supporting the growth of local businesses, increasing sustainable living, building vibrant communities or maximising the impact of regeneration investment.

6.2.3 Sectoral Focus

Appendix 2 reviews the spatial objectives and initiatives within the Study Area. In summary, these include:

- NDF Sectors, focus on advanced materials and manufacturing; construction; creative industries; energy and environment; financial and professional

services; information and communication technology; life sciences; and, tourism sector.

- Regional focus on energy and environment sectors, including the Enterprise Zone at Haven Waterway and Pembroke Dock Marine; well-being and life science at Llanelli; smart manufacturing and tourism. Alongside these key sectors, there is a need to support local employment in traditional industries, such as agriculture and manufacturing.
- Local focus in Pembrokeshire for energy sector at Milford Haven, and research and development opportunities at Haverfordwest, whilst supporting Fishguard / Goodwick Hub as a key gateway to Ireland and tourism centre. Pembroke also has a sectoral strength as a tourism location, with the rural areas being a focus for high-value spin off activities in agriculture and speciality retailing.
- Local focus in Carmarthenshire for digital and creative industries at Carmarthen, food technology and manufacturing at Cross Hands and life sciences and wellbeing at Llanelli.

6.3 Areas for Further Consideration

- Existing overlapping initiatives within the region, with multi-layer priorities (including Enterprise Zone, City Deal sites, Regional Plan for Regeneration target areas and proposed and existing allocations);
- Whilst there is a Welsh Government mandate to support regional specialisation and a need to focus on the NDF region as a whole, there are notably different sectoral focusses across Pembrokeshire and Carmarthenshire;
- Markedly different take-up rates on strategic sites between the two-counties (with Pembrokeshire delivering at a slower rate than Carmarthenshire) and a lack of clarity around available land on existing and proposed allocations across the Study Area – this has presented challenges at the last iteration of the Local Development Plan examination; and,
- Aside from Pembrokeshire Coast where there is no clear demand for specific employment sites, each of the LPAs are at a comparable stage in Plan-making where there is an opportunity to influence the size of proposed sites.

Appendix A1 'Strategic Site' Overview

Table 15 'Strategic Site' Review

Adopted Local Plan	Pembrokeshire			Carmarthenshire				Pembrokeshire Coast				Brecon Beacons												
	Site Name	Size	Use Class	Site Name	Sub-Area	Size	Use Class	Site Name	Sub-Area	Size	Use Class	Site Name	Sub-Area	Size	Use Class									
Strategic Employment Locations (SP3)	Blackbridge, Milford Haven	33.45	B1, B2, B8	Site 1 - West Carmarthen		5.45		No Strategic Sites				No Strategic Sites												
	Pembrokeshire Science and Technology Park, Pembroke Dock	22.38	B1	Site 2 - Pibwrlwyd, Carmarthen		15.5																		
	Withybush Business Park, Haverfordwest Trecwn	20.61	B1	Site 3 - South Llanelli Strategic Zone	Delta Lakes	9.78																		
		21.11	B1, B2, B8		Machynys	No employment allocation																		
	The Avenue				No employment allocation																			
	North Dock				No employment allocation																			
	Old Castle Works				No employment allocation																			
	Site 4 – Dafen, Llanelli				Employment	22.8																		
	Site 5 – Cross Hands Strategic Zone	Cross Hands West	0.79																					
		Cross Hands East	9.22																					
		Cross Hands West Food Park	8.91																					
	Non-Strategic Allocations (GN5)	Merlins Bridge Creamery Extension	5.13	B1, B2, B8	No sites currently identified.											South of St David's Assemblies	St Davids	0.93 hectares		Land at Brecon Enterprise Park	Brecon	0.8		
		Withybush North of Business Park	6.09	B1, B2, B8																Land Opposite High School, North of Hospital (Mixed Use Site)	Brecon	0.5	allocated for employment uses	
																				Land adjacent to Hay Road	Talgarth	0.6		
		Haven Head Business Park Northern Extension, Milford Haven	3.82	B1, B8																Former Mid Wales Hospital	Allocated brownfield site	0.35		
		Adjacent to Marble Hall Road, Milford Haven	6.86	B1, B8																Former Army Camp, Cwrt-y-Gollen (Mixed Use)	Allocated brownfield site	1.4	allocated for employment uses	
																				Milford Haven Gas Storage Site	0.68	B1, B8		
North of Honeyborough Industrial Estate									8.55	B1, B8														
Goodwick – Former Diwhurst Factory									0.99	B1, B8														
Goodwick- Parrog									0.6	B1, B8														

	Crymch – adjacent to Riverlea/opposite Llygad-yr-Haul	5.2	B1, B8																
	Celtic Link Business Park, near Scleddau	13.47	B1, B2, B8																
	A4115, Templeton	2.88	B1, B8																
	Old Station Yard, Letterston	1.23	B1, B8																
	Carew Airfield	5.6	B1, B8																
	Rushacre Enterprise Park Extension	1.32	B1, B8																
Emerging Local Plan	Haverfordwest	No site sizes identified.		Lanelli Life Sciences and Well-being Village		No site sizes identified.		No specific employment site allocations identified				No sites currently identified							
	Pembroke Dock			Yr Egin															
	Milford Haven																		
	Trecwn																		

Appendix A2: Spatial Objectives and Initiatives Review

Table 16 Appendix 2 Spatial Objectives and Initiatives Review

	Pembrokeshire						Carmarthenshire			Pembrokeshire National Park	Mid-Wales Partnership		
	Haven Hub Towns				North Pembrokeshire Hub Town		Rural Areas	Carmarthen	Ammanford / Crosshands		Llanelli	Brecon Beacons	Areas outside the study
	Haverfordwest	Milford Haven	Pembroke Dock	Pembroke	Neyland	Fishguard							
National Development Framework	<p>The National Development Framework is due to be published in 2020 and will likely cover the following sectors:</p> <ul style="list-style-type: none"> • Advanced materials and manufacturing; • Construction sector; • Creative Industries; • Energy and environment; • Financial and Professional Services; • Information and Communication Technology; • Life sciences sector; and, • Tourism sector. 												
Enterprise Zone: Haven Waterway	<p>The only Enterprise Zone within the study area is Haven Waterway. This Enterprise Zone comprises of nine primary sites and has a focus on the energy and environment sector. Known as a ‘Tier 1 Area’, investors to this zone have potential access to the highest level of grant aid available in the UK. Key industry figures/infrastructure already established in this Enterprise Zone include, ExxonMobil, RWE, Valero Oil Refinery, Wales’ first commercial Solar Farm at Rhosygilwen and the largest Combined Cycle Gas Turbine (CCGT) power station in Europe.</p>												
Swansea City Deal	<p>The City Deal is focused around four key themes, all connected to the provision of enhanced digital infrastructure which are as follows:</p> <ul style="list-style-type: none"> • The Internet of Economic Acceleration: targets the delivery of an integrated, regional economic development strategy with a focus on identifying and delivering digital infrastructure. • The Internet of Life Science & Well-being: targets the expansion of research and innovation infrastructure and digitally integrate healthcare. • The Internet of Energy: focuses on energy innovation including marine energy and sustainable house building. • Smart Manufacturing: supports the regional manufacturing economy and sets a target to align digital assets and R&D provision including introducing capability to specifically support R&D within the steel industry in Wales. <p>The City Deal specifically outline plans for eleven projects which have been designed to deliver on the above objectives.</p>												
Swansea Bay City Deal Regional Plan	<p>The Plan has four strategic aims:</p> <ul style="list-style-type: none"> • Support the growth of local businesses: The region suffers from a small business base, there are too few businesses and those we have are not growing quickly enough. It is important that our start-up and growing businesses are able to find suitable accommodation that fully meets their requirements. • Increasing sustainable living: There is a need to increase the number, and quality, of homes in target areas. This will meet the demand for additional housing, and improve vibrancy of these communities, increasing footfall and expenditure in the local economy, which will help to sustain local businesses. • Building vibrant communities: The target areas provide important local service functions with access to employment, leisure, community and cultural facilities at their core. This mix of activities brings vibrancy to these communities and enhances their viability by helping to differentiate the offer from competing centres (including out of town developments). • Maximising the impact of regeneration investment: The region suffers with issues of worklessness, low skill levels and business growth. Generating social benefits through Targeted Regeneration Investment Programme funded activities would help create employment and training opportunities for workless individuals and support local businesses by encouraging local sourcing. 												
	Target Regeneration Area in Haverfordwest			Target Regeneration Area in Pembroke.					Target Regeneration Area in Ammanford	Target Regeneration Area in Llanelli			

	Pembrokeshire						Carmarthenshire			Pembrokeshire National Park	Mid-Wales Partnership		
	Haven Hub Towns				North Pembrokeshire Hub Town		Rural Areas	Carmarthen	Ammanford / Crosshands		Llanelli	Brecon Beacons	Areas outside the study
	Haverfordwest	Milford Haven	Pembroke Dock	Pembroke	Neyland	Fishguard	Goodwick						
Swansea Bay City Region Economic Regeneration Strategy (2013-2030)	<p>The Strategy sets out five strategic aims including the following:</p> <ul style="list-style-type: none"> • Business Growth, Retention & Specialisation: Supporting key organisations (Tata Steel, Valero, DVLA) as well as attracting developing and retaining higher value productive businesses and SMEs. Developing an increasingly specialised business base focusing on a small number of key sectors. • Skilled & Ambitious for long-term success: Creating an integrated skills landscape, up-skilling the existing workforce as well as raising aspiration ambition and educational attainment. • Maximising job creation for all: Increasing the availability and accessibility of employment opportunities and maximising job creation. • Knowledge Economy and Innovation: Significantly improving skill levels, boosting the economic impact of research, technology transfer and commercialisation, and focusing on the critical conditions needed for 'smart growth' by focusing on certain areas. • Distinctive Places and Competitive Infrastructures: Delivering high quality, personalised public services, ensuring a dynamic commercial land and property market, delivering high quality housing and Next Generation Access Broadband. 												
Growing Mid Wales Partnership (GMWP)	<p>The Growing Mid Wales Partnership (GMWP) is a partnership and engagement initiative between Ceredigion and Powys County Councils, the Welsh Government and other public and private sectors groups with an interest in the Mid Wales region</p> <p>There are no Local Growth Zones within the Larger than Local Study Area.</p>												
Local Growth Zones													
Joint Transport Plan for South West Wales	<p>Blackbridge Access Improvements: Aims to provide access route and seaborne access to facilitate development</p>						<p>Carmarthen West Link Road: to facilitate better access to new S4C headquarters.</p>			<p>Cross Hands Economic Link Road: New highway of single carriageway from Black Lion Road to A476 NE of Gorslas</p>			
Pembrokeshire Adopted Plan LDP1 (2013)	<p>The Pembrokeshire Local Development Plan (LDP) was adopted in 2013 and has Plan Period of 2013-2021. Strategic policies relate to specific land uses and/or specific area-based policies. Policy SP7 relates to housing land and states that housing land has been allocated for the provision of 7,300 new dwelling with a target set for the delivery of 5,700 dwellings during the plan period.</p>												
	<p>Strategic Employment Allocation: Withybush Business Park, Haverfordwest</p>		<p>Strategic Employment Allocation: Blackbridge, Milford Haven</p>		<p>Strategic Employment Allocation: Pembrokeshire Science and Technology Park, Pembroke Dock</p>		<p>Strategic Employment Allocation: RNAD Trecwn.</p>						
Pembrokeshire Adopted Plan LDP1, Evidence Base: Haven Spatial Plan Area Complementarity Study	<p>Haverfordwest's key role in broadening the economic base of the spatial plan area and building on its strength as an administrative centre, and function as a transport hub</p>		<p>Exploring opportunities for developing Research and Development / high technology sectors, including drawing on Haverfordwest's proximity to Pembroke Dock and the energy sector at Milford Haven, including exploring further and higher education links to the University and the hospital</p>		<p>Commercial Leisure opportunities including at the proposed Martello Quays marina / Waterfront scheme at Pembroke Dock and the existing marina at Milford Haven.</p>		<p>Pembroke's role as a specialist retail centre, linked to its leisure and</p>		<p>The Fishguard / Goodwick Hub's key role as a key gateway to Ireland, as part of the trans-European transport network and as a local tourism and service centre</p>			<p>The promotion of value-added spin off activities such as the agriculture Mart role of Crymych, and speciality retailing in Narberth</p>	

	Pembrokeshire							Carmarthenshire			Pembrokeshire National Park	Mid-Wales Partnership		
	Haven Hub Towns					North Pembrokeshire Hub Town		Rural Areas	Carmarthen	Ammanford / Crosshands		Llanelli	Brecon Beacons	Areas outside the study
	Haverfordwest	Milford Haven	Pembroke Dock	Pembroke	Neyland	Fishguard	Goodwick							
				tourism function.										
		Milford Haven's location for housing leisure and employment.						New development for rural communities directed towards the day to day needs of existing communities						
Pembrokeshire County Council Emerging Local Development Plan LDP2 – Preferred Strategy (2017)	The Pembrokeshire LDP 2 is currently under review in preparation for the updated LDP (2017-2033).													
	Likely location for Strategic Employment Site: Haverfordwest.	Likely location for Strategic Employment Site: Milford Haven.		Likely location for Strategic Employment Site: Pembroke Dock.			Likely location for Strategic Employment Site: Trecwn.							
Pembrokeshire Adopted Plan LDP2, Evidence Base: Economic Profile of Pembrokeshire	The key sectors identified within the report include; tourism, energy and the marine economy, the rural economy and business services.													
Carmarthenshire Adopted Local Plan, LDP1 (2014)									Allocated Strategic Policy SP4 Strategic Site Allocations: West Carmarthen and Pibwrlwyd, Carmarthen	Allocated Strategic Policy SP4 Strategic Site Allocation: Cross Hands Strategic Zone	Allocated Strategic Policy SP4 Strategic Site Allocation: South Llanelli Strategic Zone and Dafen			
Carmarthenshire Emerging LDP2 – Preferred Strategy (2018-2033)									Draft Strategic Policy SP5, Yr Egin Creative Digital Cluster in Carmarthen, a new digital and creative cluster in Carmarthen, provide start up and development space for creative and digital companies and promote the Welsh Language.		Draft Strategic Policy SP5: The Llanelli Life Science and Well-being Village , for which the focus is on creating a physical village providing facilities and services which promote and improve well-being, integrate business development, education, healthcare, leisure, tourism, wellness support and research in life-sciences in one location and deliver transformational social and economic benefits.			
Carmarthenshire Emerging LDP2 – Carmarthenshire Strategic Regeneration Plan (2015)									Regeneration Plan Priorities, Cross Hands Food Park: this Site is focused on food technology and is described within the Plan as an 'employment hotspot' for the food industry in South		Regeneration Plan Priorities, Delta Lakes: The site of the Llanelli Wellness and Life Science village, the project will bring together healthcare and research uses with sheltered accommodation and			

	Pembrokeshire						Carmarthenshire			Pembrokeshire National Park	Mid-Wales Partnership	
	Haven Hub Towns				North Pembrokeshire Hub Town		Rural Areas	Carmarthen	Ammanford / Crosshands		Llanelli	Brecon Beacons
	Haverfordwest	Milford Haven	Pembroke Dock	Pembroke	Neyland	Fishguard				Goodwick		
							Wales. It is also considered to be a critical part of the wider Cross Hands Growth Zone.			public open space. Regeneration Plan Priorities, The Beacon: described within the Plan as being home to some of the top companies in Carmarthenshire The Beacon is an Enterprise Centre located in Llanelli and within the Plan is identified as having the potential to attract specific business sectors such as Advanced Manufacturing and Life Sciences.		
PCNPA Adopted Local Development Plan (2010)											Employment and employment sites are addressed by Strategy Policy 42. There is one allocated employment site within the PCNPA LDP, this is the site known as 'South of St David's Assemblies, St David's where 0.93 hectares of employment land has been allocated.	
Emerging LDP: Pembrokeshire Coast National Park Authority Deposit Local Development Plan (2018)											Policy in relation to Employment Sites remains the same as the currently adopted LDP with a new criterion added to the existing policy, to include 'allowing extensions to established businesses and giving favourable consideration to new businesses aiming to join existing clusters in the countryside.' There are no specific employment site allocations included within the PCNPA Deposit LDP.	
BBNPA Adopted Local Development Plan (2013)												
Review of the Brecon Beacons National Park Local Development Plan (2007-2022)												

Appendix A3 Defining the Study Area

Figure 4 Larger than Local Study Area

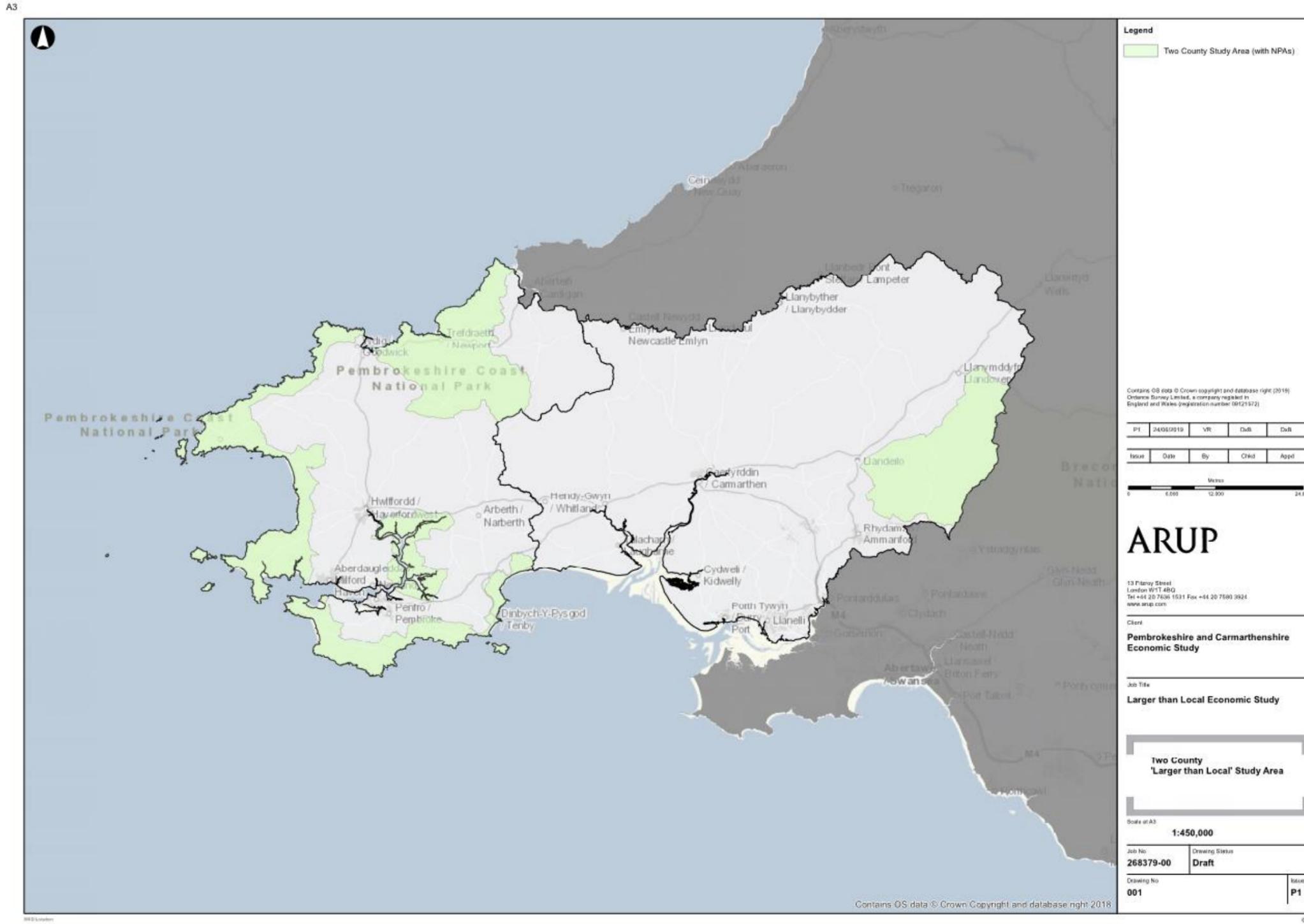


Figure 5 Travel to Work Areas

A3

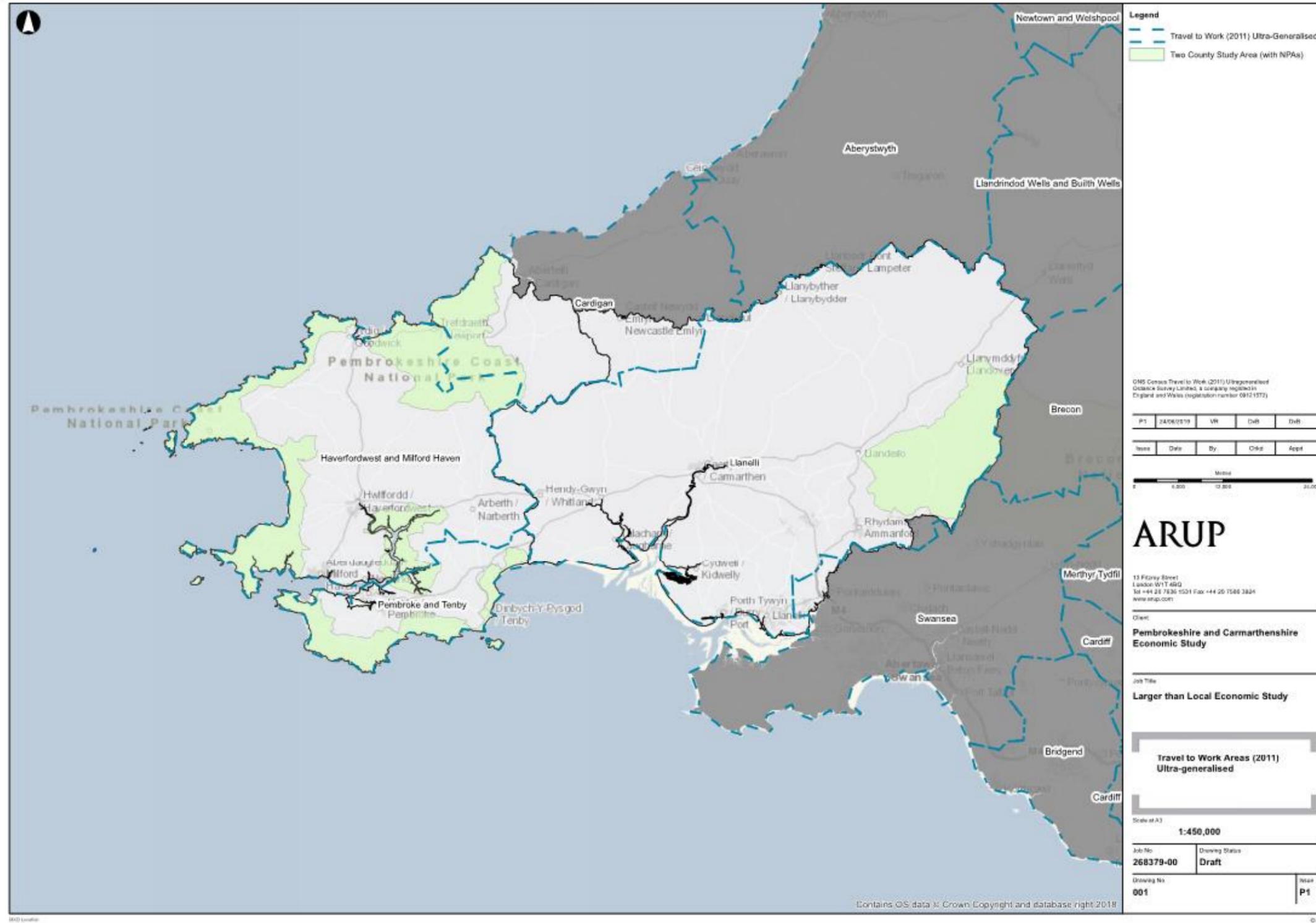


Figure 6 Community Network Areas (Carmarthenshire)

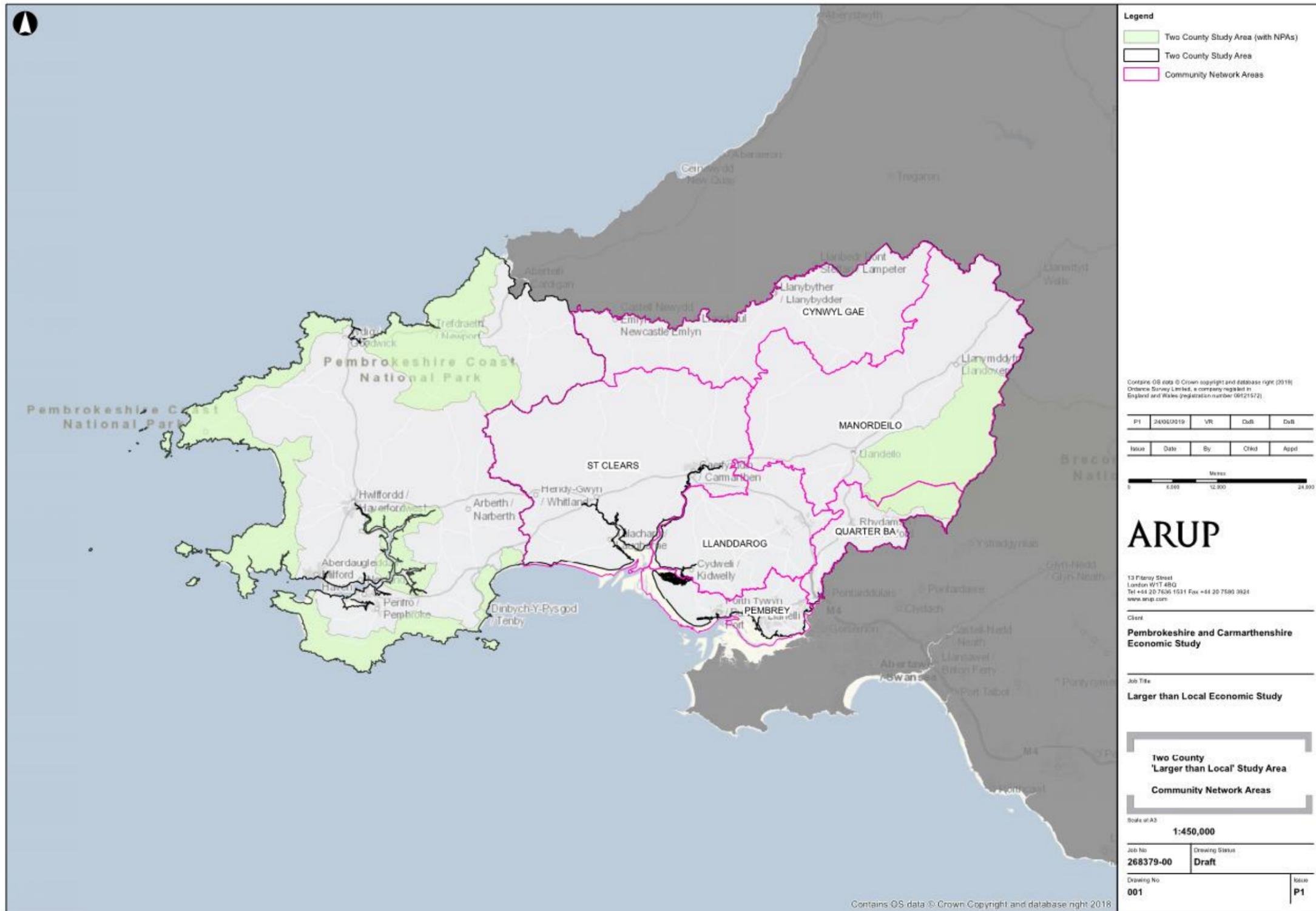


Figure 7 Affordable Housing Sub-Market Areas (Carmarthenshire)

