

TUESDAY, 11 JANUARY 2022

TO: ALL MEMBERS OF THE CABINET

I HEREBY SUMMON YOU TO ATTEND A **VIRTUAL MEETING** OF THE **CABINET AT 10.00 AM, ON MONDAY, 17TH JANUARY, 2022** FOR THE TRANSACTION OF THE BUSINESS OUTLINED ON THE ATTACHED AGENDA

Wendy Walters

CHIEF EXECUTIVE

Democratic Officer:	Kevin Thomas
Telephone (direct line):	01267 224027
E-Mail:	kjthomas@carmarthenshire.gov.uk

Wendy Walters Prif Weithredwr, *Chief Executive*,
Neuadd y Sir, Caerfyrddin. SA31 1JP
County Hall, Carmarthen. SA31 1JP

CABINET

MEMBERSHIP - 10 MEMBERS

Councillor	Portfolio
Councillor Emlyn Dole	Leader Corporate Leadership and Strategy; Chair of Cabinet; Represents Council at WLGA; Economic Development Represents the Council on the Swansea Bay City Region; Collaboration; Marketing and Media; Appoints Cabinet Members; Determines Cabinet Portfolios; Liaises with Chief Executive; Public Service Board
Vacancy	Deputy Leader Council Business Manager; Human Resources; Performance Management; Wales Audit; Training; I.C.T.; T.I.C. (Transformation, Innovation and Change); Strategic Planning
Councillor Ann Davies	Communities and Rural Affairs Rural Affairs and Community Engagement; Community Safety; Police; Counter-Terrorism and Security Act 2015; Tackling Poverty; Wellbeing of Future Generations; Third Sector Liaison; Equalities, Climate Change Strategy
Councillor Glynog Davies	Education and Children Schools; Children's Services; Special Education Needs; Safeguarding; Respite Homes; Regional Integrated School; Improvement Service; Adult Community Learning; Youth Services; School Catering Services, Lead Member for Children and Young People; Youth Ambassador
Councillor Hazel Evans	Environment Refuse; Street Cleansing; Highways and Transport Services; Grounds Maintenance; Building Services (excluding housing stock); Emergency Planning; Flooding, Public Rights of Way
Councillor Linda Evans	Housing Housing – Public; Housing – Private, Housing Maintenance and repairs & Ageing Well.
Councillor Peter Hughes Griffiths	Culture, Sport and Tourism Town and Community Councils Ambassador; Development of the Welsh Language; Theatres; Sports; Leisure Centres; Museums; Libraries; Country Parks; Tourism.
Councillor Philip Hughes	Public Protection Trading Standards; Environmental Health. Environmental Enforcement; Planning enforcement; Unlicensed Waste; Parking Services; Bio diversity
Councillor David Jenkins	Resources Finance & Budget; Corporate Efficiencies; Property/Asset Management; Caretaking & Building Cleaning; Procurement; Housing Benefits; Revenues; Statutory Services (Coroners, Registrars, Electoral, Lord Lieutenancy); Armed Forces Champion Contact Centres and Customer Service Centres
Councillor Jane Tremlett	Social Care & Health Adult Social Services; Residential Care; Home Care; Learning Disabilities; Mental Health; NHS Liaison/Collaboration/ Integration; Care Home Catering Services, Carers' Champion; Dementia Care Champion; Disability Ambassador

A G E N D A

1. **APOLOGIES FOR ABSENCE**
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16. **ANY OTHER ITEMS OF BUSINESS THAT BY REASONS OF SPECIAL CIRCUMSTANCES THE CHAIR DECIDES SHOULD BE CONSIDERED AS A MATTER OF URGENCY PURSUANT TO SECTION 100B(4)(B) OF THE LOCAL GOVERNMENT ACT, 1972.**

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CABINET

20 DECEMBER 2021

PRESENT: Councillor E. Dole (Chair)

Councillors:

C.A. Davies, G. Davies, H.A.L. Evans, L.D. Evans, P.M. Hughes, P. Hughes-Griffiths, D.M. Jenkins and J. Tremlett.

Also in attendance:

Councillor D.M. Cundy.

The following Officers were in attendance:

W. Walters, Chief Executive;
C. Moore, Director of Corporate Services;
L.R. Jones, Head of Administration and Law;
P.R. Thomas, Assistant Chief Executive (People Management & Performance);
G. Morgans, Director of Education & Children's Services;
R. Mullen, Director of Environment;
N. Daniel, Head of ICT and Corporate Policy; Interim Head of Planning;
J. Jones, Head of Regeneration;
L. Morris, Senior Press Officer;
L. Jenkins, Executive Board Support Officer;
M.S. Davies, Democratic Services Officer;
E. Evans, Principal Democratic Services Officer;
J. Owen, Democratic Services Officer.

Virtual Meeting:- 10:00am - 10:40am

1. APOLOGIES FOR ABSENCE

An apology for absence was received from Councillor L.M. Stephens.

2. DECLARATIONS OF PERSONAL INTEREST

There were no declarations of personal interests.

3. TO SIGN AS A CORRECT RECORD THE MINUTES OF THE MEETING OF THE CABINET HELD ON THE 6TH DECEMBER 2021

UNANIMOUSLY RESOLVED that the minutes of the meeting of the Cabinet held on the 6th December, 2021 be signed as a correct record.

4. QUESTIONS ON NOTICE BY MEMBERS

The Chair advised that no questions on notice had been submitted by members.

5. PUBLIC QUESTIONS ON NOTICE

The Chair advised that no public questions had been received.

6. MID-YEAR TREASURY MANAGEMENT AND PRUDENTIAL INDICATOR REPORT - 1ST APRIL 2021 TO 30TH SEPTEMBER 2021

The Cabinet considered an update report on the treasury management activities and the prudential indicators for the period 1st April 2021 to 30th September 2021.

UNANIMOUSLY RESOLVED TO RECOMMEND TO COUNCIL that the Mid-Year Treasury Management and Prudential Indicator Report for 1st April 2021 to 30th September 2021 be approved.

7. COUNCIL TAX BASE 2022-23

The Cabinet considered the Council Tax Base 2022-23 report. Cabinet Members were reminded that the Council was required to determine, on an annual basis, its Council Tax Base and the Council Tax Base of each community within its area, for the purpose of calculating the level of Council Tax for the forthcoming financial year and, under the provisions of Section 84 of the Local Government Act 2003 and the Local Authorities Executive Arrangements (Functions and Responsibilities) (Amendment) (Wales) Regulations 2004, the annual calculation had been delegated to the Cabinet.

The calculation of the Tax Base for the County Council for 2022-23 was detailed in Table 1a and summarised in Table 1b, which were appended to the report. The calculation for individual Town and Community Council areas for 2022-23 was summarised in Table 2 and detailed in Appendix A, which were also appended to the report.

Cabinet Members noted that the Tax Base report provided calculations which were Authority-wide as well as broken down into all community and town council areas for their precept purposes and that the Council Tax Base for the financial year 2022-2023 had been calculated at £74,698.57.

UNANIMOUSLY RESOLVED that

- 7.1 the Council Tax Base calculations for the financial year 2022-23 as detailed within Appendix A of the report be approved;**
- 7.2 a Council Tax Base of £74,698.57 as detailed within tables 1a and 1b of the report, be confirmed in respect of the County Council area;**
- 7.3 the relevant tax bases for the individual community and town council areas, as detailed in table 2 of the report be confirmed.**

8. CARMARTHENSHIRE ADMISSIONS FORUM - MEMBERSHIP

The Cabinet received a report on the membership of the Carmarthenshire Admissions Forum which explained that in accordance with the LA appointment policy for Admissions Forum Members, there was a requirement to review core members and school members of the Forum every 4 years and that the last full membership review took place in Autumn 2017.

It was reported that typically, the renewal of membership would fall in sync with the County Council members elections however, due to the Welsh Government elections in 2021, the local Council elections were delayed a year to 2022. Therefore, in order to comply with the Welsh Government School Admissions Code, there was a need to re-elect the core members for the period from November 2021 to the Local Government Elections in May 2022. Cabinet Members noted that receipt of confirmation had been received from the Welsh Government that re-appointment of existing members was acceptable.

The report proposed that all existing core elected members be re-elected for the period November 2021 to May 2022. This approach had been supported by the Carmarthenshire's Admissions Forum at its meeting held on 25th November 2021.

A full review of the Forum members would take place following the County Council elections in May 2022 and every 4th year after that.

UNANIMOUSLY RESOLVED that the current elected member representatives on the Panel, as detailed within the report be re-appointed to the Admissions Forum up to the 9th May 2022.

9. NOTICE OF MOTION REFERRED FROM COUNCIL (15TH SEPTEMBER 2021) - ACOUSTIC CAMERAS

Cabinet Members received a report which detailed a Notice of Motion on the matter of acoustic cameras, which was referred to Cabinet from Council on 15th September 2021.

It was reported that since September 2021, research into the use of acoustic cameras by other local authorities had taken place with a view to understanding how these could be implemented within Carmarthenshire. The research revealed that in the main there were two significant challenges in terms of resourcing and coverage.

Cabinet Members were informed that mobile acoustic cameras had not been developed yet and that they had to be hardwired onto a lamp post. Relocating hardwired acoustic cameras to specific areas of complaint could be resource intensive and costly. In addition, Cabinet Members noted that to purchase and install four acoustic cameras across the County, it would cost the Council an estimated £110,000+ with a significant additional resource cost to maintain. This cost was deemed a financially disproportionate way of dealing with the issue.

It was further reported that at present, only 5% of the Councils complaints were attributed to vehicle noise and that each complaint was investigated accordingly with a local resolution being sought.

In recognising that loud vehicle noise was an issue which affected some residents, Members concurred that currently the most cost-effective method of managing this would be to continue to favour the local approach at present, by continuing with the current proactive approach and liaising with Dyfed Powys Police as and where necessary.

UNANIMOUSLY RESOLVED that

9.1 the Notice of Motion on Acoustic Cameras referred from Council on 15th September 2021 be received;

9.2 the current proactive approach and the number of complaints received on this matter continue to be monitored.

9.3 a report be presented to the Cabinet in 12 months should there be a marked increase in complaints any significant changes in terms of technological developments.

10. NOTICE OF MOTION REFERRED FROM COUNCIL (8TH DECEMBER 2021) - 101 CALL SYSTEM

Cabinet Members received a report which detailed a Notice of Motion on the matter of the 101 call system, which was referred to Cabinet from Council on 8th December 2021.

Cabinet Members were informed that Dyfed Powys Police were currently seeking to procure an Integrated Communication Control System and Contact Management Solution which included the telephony platform for the Force Control Room based at Headquarters, Carmarthen. The Police and Crime Commissioner for Dyfed Powys would shortly be receiving tenders from suitably qualified and experienced organisations for the supply, implementation, support and maintenance of a Contact Management Solution.

In considering that Dyfed Powys Police had committed to procure a new Integrated Communication Control System and Contact Management Solution, it was proposed that the Cabinet write a letter to the Chief Constable to acknowledge and encourage his intention to improve the current 101 call system. The proposal was duly seconded.

UNANIMOUSLY RESOLVED that the Cabinet write a letter to the Dyfed Powys Police Chief Constable to acknowledge and encourage the installation of a new solution as an improvement upon the current 101 call system.

11. ANY OTHER ITEMS OF BUSINESS

The Chair advised that there were no items of urgent business.

12. EXCLUSION OF THE PUBLIC

UNANIMOUSLY RESOLVED, pursuant to the Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007, that the public be excluded from the meeting during consideration of the following items as the reports contained exempt information as defined in paragraph 14 of Part 4 of Schedule 12A to the Act.

13. TRANSFORMING TOWNS PLACEMAKING STRATEGIC ACQUISITIONS

Following the application of the public interest test it was **RESOLVED** pursuant to the Act referred to in minute no. 12 above not to publicise the content of the report as it contained exempt information relating to the financial or business affairs of any particular person (including the Authority holding that information) (Paragraph 14 of Part 4 of Schedule 12A to the Act).

The public interest test in this matter related to the fact that the report contained detailed information about particular business and financial affairs. In this case, the public interest in maintaining the above exemption under the 1972 Act in respect of this report outweighs the public interest in disclosing the information contained therein, as disclosure could undermine the Council's position in subsequent negotiations and adversely impact upon the public purse.

The Cabinet Members considered a report which detailed information in relation to the strategic acquisitions of properties utilising the Transforming Towns Placemaking funding.

UNANIMOUSLY RESOLVED

13.1 that the acquisition of properties utilising Transforming Towns Placemaking funding be approved

13.2 to delegate authority to the Head of Regeneration and Head of Administration and Law, in consultation with Cabinet Members with responsibility for Regeneration and Resources, to finalise and complete the proposed acquisitions;

13.2 to delegate authority to the Head of Regeneration, in consultation with the Director of Corporate Services and the Cabinet Members for Regeneration and Resources, to acquire alternative properties of a strategic nature that would add value to the Council's town centre regeneration proposals, in the event that the properties identified in this report (Table 1) cannot be purchased and to ensure maximum grant spend.

CHAIR

DATE

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Cabinet 17th January 2022

South West Wales Regional Economic Delivery Plan		
Recommendation / key decisions required:		
It is recommended that:		
<ol style="list-style-type: none"> 1. The South West Wales Regional Economic Delivery Plan is referred to Council for adoption as the Council's over-arching economic regeneration policy 		
Reasons:		
To secure adoption of the new Regional Economic Delivery Plan for South West Wales by Council (to replace the 2013 Swansea Bay City Region Economic Regeneration Strategy).		
Relevant scrutiny committee to be consulted No		
Cabinet Decision Required	YES	
Council Decision Required	YES	
CABINET MEMBER PORTFOLIO HOLDER:-		
Cllr. Emlyn Dole - Leader		
Directorate:	Designations:	E Mail Address:
Name of Head of Service:	Head of Regeneration	JaJones@cararthenshire.gov.uk
Jason Jones		
Report Author:		
Jason Jones		

EXECUTIVE SUMMARY

Cabinet
17th January 2022

South West Wales Regional Economic Delivery Plan

1. Introduction

- 1.1 It has been eight years since the publication of the Swansea Bay City Region Economic Regeneration Strategy in 2013, and the economic and policy context has changed considerably at the Welsh and UK level since then, particularly in light of the UK's decision to leave the European Union and the impact of the covid-19 pandemic. In addition, the regional landscape is changing with the advent of the new Corporate Joint Committees, and the preparation of new Regional Economic Frameworks by Welsh Government that set out visions and high level priorities for each region in Wales.
- 1.2 To respond to changing circumstances, the four local authorities in South West Wales, in partnership with Welsh Government, commissioned SQW to produce a new Regional Economic Delivery Plan (REDP). This will replace the previous Swansea Bay City Region Economic Regeneration Strategy.
- 1.3 The REDP commission included:
- A thorough analysis of the evidence base on the region's economy, labour market and infrastructure to determine its strengths, weaknesses, opportunities and threats
 - Interpretation of the strategic policy context at local, regional and national level
 - Development of detailed strategic aims and objectives that respond to the economic opportunities for the region and complement the shared regional vision as articulated in the Regional Economic Framework
 - Preparation of Regional Economic Delivery Plan that includes actions that need to be taken to achieve the vision and objectives
- 1.4 The Regional Economic Delivery Plan is attached at Appendix A
- 1.5 The REDP complements the new Welsh Government Regional Economic Framework (REF) and provides a further layer of detail below the REF, outlining the objectives and actions that will deliver against the high level vision in the REF.
- 1.6 The REDP also complements the Carmarthenshire Economic Recovery & Delivery Plan (April 2021)
- 1.7 The REDP sets out an ambitious 'route map' for the development of the region's economy over the next ten years, identifying priorities for intervention and setting out how business, government, education, voluntary/ community organisations, social enterprises and other partners can work together to bring them forward.

2. South West Wales Regional Economic Delivery Plan

- 2.1 The REDP identifies that South West Wales has a diverse economy and a unique set of natural and cultural assets, underpinned by the quality of its coastal and rural environment, industrial heritage and university presence.
- 2.2 The economic analysis shows:
- In the years leading up to the Covid-19 pandemic, the South West Wales economy performed strongly in generating new jobs: by 2019, there were 322,000 jobs in the region, an impressive increase of 20,000 on the 2013 figure.
 - The productivity gap with the rest of the UK has narrowed slightly over time but is still substantial, with regional productivity (GVA per filled job) standing at 80% of the UK level in 2018.
 - Economic activity rates in South West Wales have improved at a faster pace than the rest of the UK over the past 15 years, but the rate continues to fall behind the UK average: the economic activity rate in South West Wales was 73.8% in 2018, compared with 78.9% across the UK.
 - There has been a steady improvement in qualification levels with 35% of the working age population qualified to NVQ level 4+ (degree level) compared to 22% in 2004, and the proportion with no qualifications has halved over the same period, but in relative terms there is still a gap with the rest of the UK
 - The business base grew in the years leading up to the pandemic but the number of enterprises relative to the working age population (enterprise density) and start up rates remain lower than the rest of the UK.
 - There is a widely recognised gap between demand and supply for industrial premises, with low rental levels affecting the viability of private sector led developments.
 - Across the region concentrations of disadvantage are significant, principally in the urban centres of Swansea, Llanelli, Neath, Port Talbot, Pembroke Dock and upper Western Valleys.
- 2.4 Overall, the review of economic performance suggests good progress over recent years, especially in terms of job creation, but there is a persistent gap in outcomes between the region and the rest of the UK. This reflects the ‘structural’ nature of many of the region’s challenges linked to the long-term processes of industrial change (which in some respects are still ongoing), and are shared with other regions in Wales and the UK.
- 2.5 The review has also identified a series of distinctive strengths and opportunities in South West Wales, especially linked with the region’s energy potential (particularly green energy and the net zero opportunity), university-industrial links, strong cultural identity, environmental assets and quality of life offer. The REDP aims to build on these distinctive regional strengths and opportunities to develop a more prosperous and resilient South West Wales economy.
- 2.6 Unlike the previous Economic Regeneration Strategy, which was predominantly focused on improving productivity, the REDP recognises that ‘Transformational’ growth opportunities need to be balanced with the conditions for incremental improvements in resilience, capacity and capability across the whole of the economy. This was a key theme that emerged from consultation with regional partners during the preparation of the Plan. While there are distinctive opportunities to pursue at the ‘leading edge’, long-term employment resilience and wage growth is going to depend on the sustainability, productivity and expansion of the wider stock of regional businesses.

- 2.7 To help plan for the future, the REDP sets out three ‘Ambitions’ which set out the nature of the South West Wales economy that we want to work towards. These are:
- Resilient and sustainable
 - Enterprising and ambitious
 - Balanced and inclusive
- 2.8 The ambitions are supported by three complementary Missions, which will guide activity over the next ten years:
- Mission 1 – Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy: Taking forward the region’s major energy related projects and driving the benefits through the region (via industrial decarbonisation, supply chain opportunities, university-linked innovation, etc.).
 - Mission 2 – Building a strong, resilient and embedded business base: Understanding and growing the business stock, supporting widespread social and commercial entrepreneurship, creating stronger supply chain and innovation networks, making public sector support sustainable; driving forward technology adoption and diffusion.
 - Mission 3 – Growing and sustaining the ‘experience’ offer: Linking environmental quality, quality of life and community character to create a region that retains and attracts talent and investment, and to promote this consistently and powerfully to the outside world
- 2.9 The REDP sets out some initial key action areas to deliver against the ambitions and missions. These actions will form the basis of a ‘living’ action plan document that will be regularly reviewed by regional partners and will evolve to embrace new investment proposals as they emerge.
- 2.10 The new Regional Economic Delivery Plan will be owned and overseen by the new South West Wales Corporate Joint Committee (CJC). Once the CJC is formally constituted, it is proposed that the REDP will be presented for adoption as the regional strategy for economic wellbeing. Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC’s behalf.

3. Recommendation

- 3.1 It is recommended that the South West Wales Regional Economic Delivery Plan is adopted as the Council’s over-arching economic regeneration policy.

DETAILED REPORT ATTACHED?

Yes - South West Wales Regional Economic Delivery Plan (September 2021)

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Head of Regeneration

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	NONE	NONE	NONE	NONE	NONE	NONE

Policy

The Well-being of Future Generations Act 2015 requires public bodies in Wales to consider the long-term impact of their decisions across all aspects of wellbeing. The Act outlines seven ‘wellbeing goals’ – and public policy should contribute to all of them, not just one or two. Delivering on the ambitions of the regional economic delivery plan and delivering “a prosperous region”, means that we should also contribute to a region that is more resilient, equal, healthy, cohesive and globally responsible, and which enjoys a vibrant culture and Welsh language.

One of the plans 3 strategic missions is to establish South West Wales as a UK leader in renewable energy and the development of a net zero economy, which will support this Council’s ambition of becoming net zero carbon by 2030 and the UK and Welsh Government commitments to decarbonisation and the achievement of ‘net zero’ by 2050.

The plan complements the Carmarthenshire Economic Recovery & Delivery Plan (April 2021), providing the platform for future growth opportunities beyond our recovery horizon.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Jason Jones

Head of Regeneration

(Please specify the outcomes of consultations undertaken where they arise against the following headings)

1. Scrutiny Committee

N/A

2. Local Member(s)

N/A

3. Community / Town Council

N/A

4. Relevant Partners

Proposals have been developed in partnership with Neath Port Talbot County Council, Swansea City Council, Pembrokeshire County Council and Welsh Government.

5. Staff Side Representatives and other Organisations

N/A

**CABINET PORTFOLIO HOLDER(S)
AWARE/CONSULTED**

YES

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

South West Wales Regional Economic Delivery Plan



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Executive Summary

Background

1. South West Wales has a diverse economy and a unique set of natural and cultural assets, underpinned by the quality of its coastal and rural environment, industrial heritage and capacity and university presence. In 2014, partners in South West Wales jointly published an Economic Regeneration Strategy, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.
2. Seven years on, much has been achieved. However, there is more to be done to unlock the region's potential and to ensure that growth is resilient, sustainable and inclusive. In December 2020, the South West Wales local authorities, working closely with the Welsh Government, commissioned a new **Regional Economic Delivery Plan**. Looking ahead to the next ten years, this sets out an ambitious 'route map' for the development of the region's economy, identifying priorities for intervention and articulating how business, government, education, voluntary, community and social enterprise organisations and other partners should work together to bring them forward.

The economic and policy context

3. In the years leading up to the Covid-19 pandemic, the South West Wales economy performed strongly in generating new jobs: By 2019, there were some 322,000 jobs in the region, an impressive increase of 20,000 on the 2013 figure. However, there is still a large and persistent productivity gap with the rest of the UK.
4. Analysis of the region's economy highlights that:
 - **The region's economic weaknesses are largely structural**, linked with long-term processes of industrial change (which in some respects are still ongoing), and are shared with other regions in Wales and the UK.
 - **However, the region has a series of distinctive strengths and opportunities.** These are especially linked with the region's energy potential, university-industrial links, strong cultural identity, environmental assets and quality of life offer..
 - **There is a 'window of opportunity' to build on and capture some of these**, especially in relation to the green energy and net zero opportunity, where the region has specific advantages, but where other parts of the UK (and beyond) also have ambitious plans and technology and the dynamics of investment are changing rapidly. **Having the capacity to exploit these opportunities will be important and the timing of this matters greatly.**
 - **The region contains much diversity**, especially within the rural/ urban dimension. Despite diversity across the region, there is substantial commonality, and some of the big opportunities have a region-wide footprint. However, some of them extend beyond the

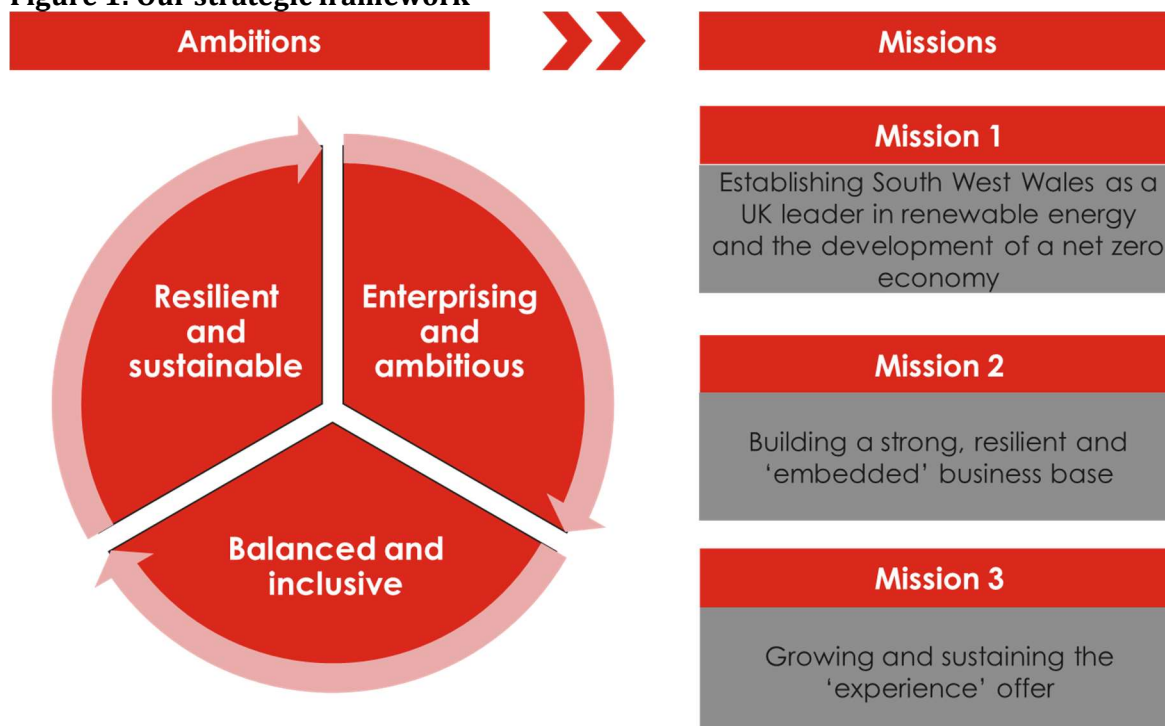
region itself, and 'out-of-region' links (for example, the South Wales Industrial Cluster and the links through to Cardiff Capital Region) will be of relevance.

- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in resilience, capacity and capability across the economy.** This was a key theme emerging from consultation as part of this Plan. There are distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs.
5. The Plan has also been developed against the backdrop of a rapidly evolving policy context, as the region recovers from the Covid-19 pandemic and adjusts to a new trading and funding landscape following Brexit. However, looking to the next ten years, the climate emergency, the pace of (and adaption to) technology change and the need to ensure that the benefits are captured locally and are widely distributed will be central to economic strategy.

Our Ambitions and Missions for the next ten years

6. Over the next ten years, we will build on our distinctive strengths and opportunities summarised above to develop a more prosperous and resilient South West Wales economy.
7. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three complementary **Missions**:

Figure 1: Our strategic framework



Source: SQW 2021

8. Our three ‘Missions’ will guide future activity over the next ten years and beyond. They are designed to give a clear direction of travel, while remaining sufficiently broad to accommodate a wide range of potential investments that will come forward over time. The three high-level Missions are as follows:
- **Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy:** Taking forward the region’s major energy related projects and driving the benefits through the region (via industrial decarbonisation, supply chain opportunities, university-linked innovation, etc.).
 - **Building a strong, resilient and embedded business base:** Understanding and growing the business stock, supporting widespread social and commercial entrepreneurship, creating stronger supply chain and innovation networks, making public sector support sustainable; driving forward technology adoption and diffusion.
 - **Growing and sustaining the ‘experience’ offer:** Linking environmental quality, quality of life and community character to create a region that retains and attracts talent and investment, and to promote this consistently and powerfully to the outside world.

Delivering the Plan

9. To translate our Missions into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept ‘live’: it will regularly be reviewed by regional partners and will evolve to embrace new investment proposals as they emerge.
10. Currently, the projects within the pipeline have a combined value of around £3 billion. While some are at an early stage of development, and costs will be determined through the business case process, this gives an indication of the scale of the opportunity ahead. Building on the success of the current Swansea Bay City Deal, we will pursue the creation of a further, flexible **Investment Fund** to co-invest alongside the private sector in projects that will deliver our Missions, where business cases are robust.
11. To oversee the strategic direction of the Plan, a new **South West Wales Corporate Joint Committee (CJC)** has been established, enabling the four local authorities to work closely together alongside the Welsh Government and to share resources. Building on our recent success, and alive to the immediacy of our current challenges and opportunities, the CJC will drive forward our Delivery Plan – building a South West Wales that is *“resilient and sustainable; enterprising and ambitious; and balanced and inclusive”*.

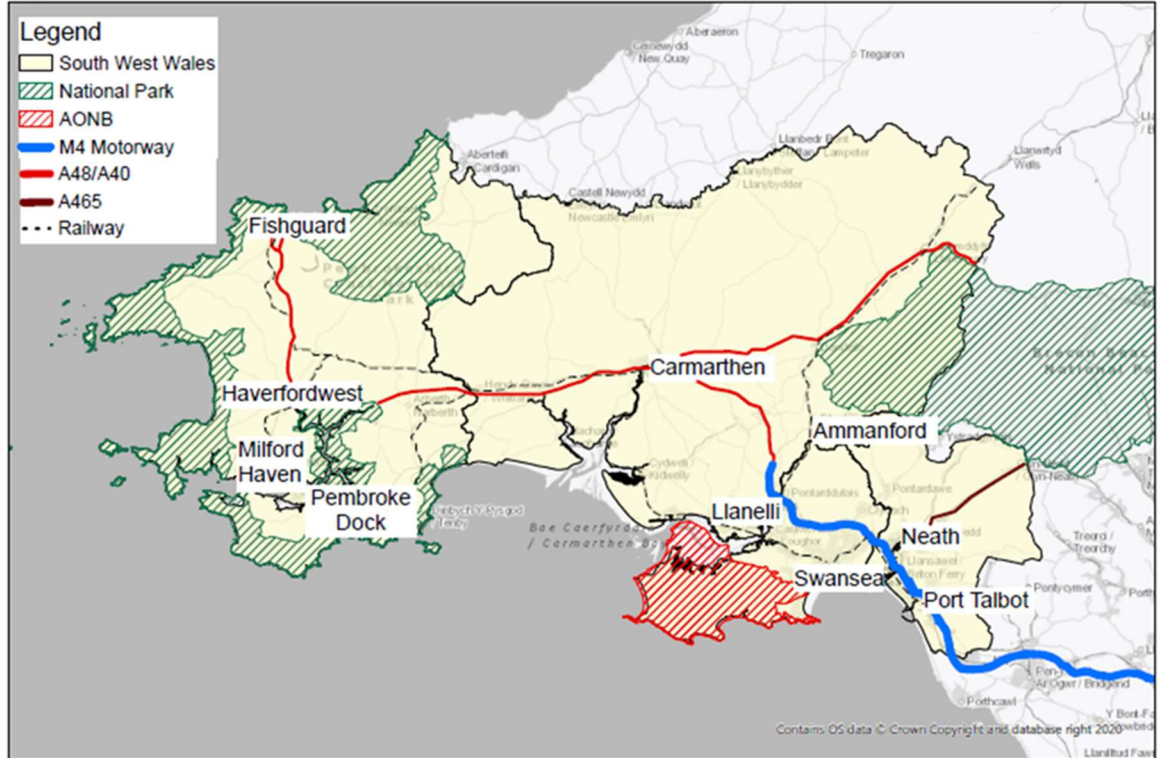
1. Introduction

*Welcome to the **Regional Economic Delivery Plan** for South West Wales. Looking ahead to 2030, this Plan sets out our ambitions for a resilient, broad-based and sustainable economy – and outlines where we will focus our efforts in the next few years to realise them.*

Introducing South West Wales

- 1.1 Extending from Neath Port Talbot in the east to Pembrokeshire in the west, via Swansea and Carmarthenshire, South West Wales has a diverse economy and a unique set of natural and cultural assets.
- 1.2 Economically, our industrial heritage combines with some of the UK’s most significant marine energy potential, driving major opportunities for decarbonisation and the growth of the UK’s Green Economy. Environmentally, the coastline and countryside – including the Pembrokeshire Coast and Brecon Beacons National Parks and the Gower Area of Outstanding Natural Beauty – contribute to a superb visitor offer and quality of life. Culturally, the region encompasses the dynamic, growing university city of Swansea, a diverse and distinctive network of rural towns and an increasingly vibrant Welsh language.

Figure 1-1: South West Wales in context



Source: Produced by SQW 2021. Licence 100030994. Contains OS data © Crown copyright [and database right] (2020)

A bold and inclusive new economic delivery plan

- 1.3** In 2014, partners in South West Wales jointly published an **Economic Regeneration Strategy**, setting the strategic groundwork for the Swansea Bay City Deal, a £1.3 billion investment package supported by the UK and Welsh Governments.
- 1.4** Seven years on, much has been achieved. The region’s knowledge and research capacity has been supported through the delivery of major facilities such as the Swansea Bay Campus and continued investment in industry-academic links. The economic opportunities associated with the growth of the health economy have been reinforced through the development of the new Institute of Life Sciences and the start of work on the Pentre Awel health and wellbeing campus in Llanelli. S4C’s new headquarters has opened in Carmarthen, accompanied by a concentration of creative media businesses; substantial investment has continued to flow into Pembrokeshire’s offshore renewable opportunities; and Swansea city centre’s ambitious regeneration programme is well underway. There has been major investment in our digital connectivity, with exciting plans for a more sustainable regional transport system through Swansea Bay and South West Wales Metro.
- 1.5** This provides a strong platform for future growth. However, as the analysis in Chapter 2 makes clear, there is more to be done to unlock the region’s potential and to ensure that growth is resilient, sustainable and inclusive. Looking to the next ten years and beyond, the South West Wales local authorities, working closely with the Welsh Government, have prepared this **Regional Economic Delivery Plan** to ensure that we make the most of the exciting growth opportunities that are ahead of us.

Combining strategic clarity with delivery flexibility

- 1.6** In developing the Plan, we have followed a sequential approach. First, we started with a fresh view of the **evidence**, considering the ‘state of the region’ and the outlook for the future. This informed our high-level **objectives**, setting out “*what we want our economy to be (more) like*”. These provided a framework for a series of clearly-defined **missions**: key areas of focus for the next ten years, and the **interventions**, or project activities, needed to achieve them:

Figure 1-2: Regional Economic Delivery Plan logic sequence



Source: SQW

- 1.7** However, we live in an uncertain and dynamic world, and over the lifetime of this Plan, we will need to respond to new challenges and opportunities (and new ideas and investments that are yet unforeseen). **A resilient plan is a flexible and agile plan:** while this document

provides strategic clarity and focus on our priorities, we anticipate that project actions and investments will evolve over time.

Navigating the changing strategic context

1.8 This Plan is developed in the context of (and contributes to) a range of plans and strategies developed at local, national and UK level. Looking across the strategic landscape, a number of themes are especially relevant to this Plan:

- First, the **Well-being of Future Generations Act 2015** requires public bodies in Wales to consider the long-term impact of their decisions across all aspects of wellbeing. The Act outlines seven ‘wellbeing goals’ – and public policy should contribute to all of them, not just one or two. For an economic plan, that means that in delivering “a prosperous region”, we should also contribute to a region that is more resilient, equal, healthy, cohesive and globally responsible, and which enjoys a vibrant culture and Welsh language¹. The principles of the Act are explicitly embedded in the Welsh Government’s *Economic Resilience and Reconstruction Mission*² (and its principles of “Prosperous, Green and Equal”) and are central to this Delivery Plan.
- Second, there is an overarching and firm **commitment to decarbonisation and the achievement of ‘net zero’ by 2050**. The UK and Welsh Government is legally committed to net zero carbon emissions (over a 1990 baseline) by 2050, a process that will involve far-reaching changes in industrial processes, transport networks and heating systems. The Welsh Government’s *Programme for Government* commits to “acting decisively to tackle the nature and climate emergency”³, and this is reinforced in the establishment of the Minister of Climate Change portfolio and (for example) in the clear prioritisation of sustainable and active travel within *Llwybr Newydd*, the new transport strategy. From an economic strategy perspective, the decarbonisation imperative creates opportunities for innovation and technology development, as well as an urgent need for adaptation to support industrial resilience.
- Third, a broader policy focus on the **opportunities and challenges presented by technological and demographic change** featured in the UK Government’s former *Industrial Strategy* and remains prominent in its successor, the *Plan for Growth*. A series of reports to the Welsh Government have also set out approaches to digitalisation⁴ and the adoption of an innovation strategy focused around meeting societal need⁵.
- Fourth, **the response to the UK’s exit from the European Union**. Over the coming years, we will need to adapt to changing patterns of trade. The impact of this is not yet fully

¹ Future Generations Commissioner for Wales, [Well-being of Future Generations Act \(Wales\) 2015](#)

² Welsh Government (February 2021), *Our Economic Resilience and Reconstruction Mission*

³ Welsh Government (June 2021), [Programme for Government](#), p.3

⁴ Welsh Government (September 2019), [Wales 4.0: Delivering economic transformation for a better future of work](#)

⁵ Rick Delbridge, Dylan Henderson and Kevin Morgan (May 2021), [Scoping the future of innovation policy in Wales](#)

apparent, although for some sectors will be far-reaching (for example, the adaption of agriculture to the new Environmental Land Management system). Brexit also means a significant change for South West Wales in terms of the public investment available for economic development: historically, the region has been one of the UK's largest beneficiaries from EU funding. Looking to the future, it is likely that we will need a new, perhaps more 'investment and return' based approach.

- Finally, this Plan is developed in the context of a wider approach to **regional economic development** in Wales, with South West Wales forming one of the regional 'building blocks' of *Future Wales*, the new national spatial development plan⁶. Plans have also been advanced for new approaches to regional governance and delivery (described in Chapter 5), as well as the Regional Economic Framework, which has been developed by the Welsh Government in conjunction with the local authorities alongside this Plan.

Plan structure

1.9 The remainder of this Plan is structured in six chapters:

- Chapter 2 sets out the **economic landscape** within which the Plan has been developed, outlining the strengths, weaknesses, opportunities and threats facing the regional economy and the key issues that need to be addressed.
- Chapter 3 introduces our **strategic framework**, setting out our ambitions for the future and the type of economy that we want to help develop.
- Building on this, Chapters 4-6 explain our three **key 'missions'**: the specific goals that we want to achieve over the next decade.
- Finally, Chapter 7 sets out **how we will deliver the Plan**, including the role of the Corporate Joint Committee and options for future implementation arrangements.

1.10 In addition, **Annex A** provides a summary SWOT analysis. **Annex B** provides an assessment of this Plan against the Wellbeing of Future Generations Act (Wales) 2015. **Annex C** explains the process of developing the Plan, and how partners were engaged and priorities identified.

1.11 Two supplementary documents support the Plan:

- First, an **Evidence and Policy Landscape Review** provides further detail in support of the narrative in Chapter 2

Second, while this Plan takes a long-term view, specific actions will evolve over time as business cases are progressed and new investment opportunities come forward. Alongside the Plan, we have prepared a **supplementary Project Pipeline document**, setting out known and emerging interventions and the next steps involved in taking them forward.

⁶ Welsh Government (February 2021), [Future Wales: The National Plan 2040](#)

2. South West Wales: The economic landscape

South West Wales has performed strongly in recent years in generating new jobs and driving forward priority investments. Despite continuing productivity challenges, there are major opportunities ahead for sustainable growth, linked with our energy, innovation, business and community assets. This chapter sketches a picture of the region's economy, outlining recent economic performance, key strengths and assets, and the major 'transformational' trends that will impact on future growth.

Places and connections: The region's economic geography

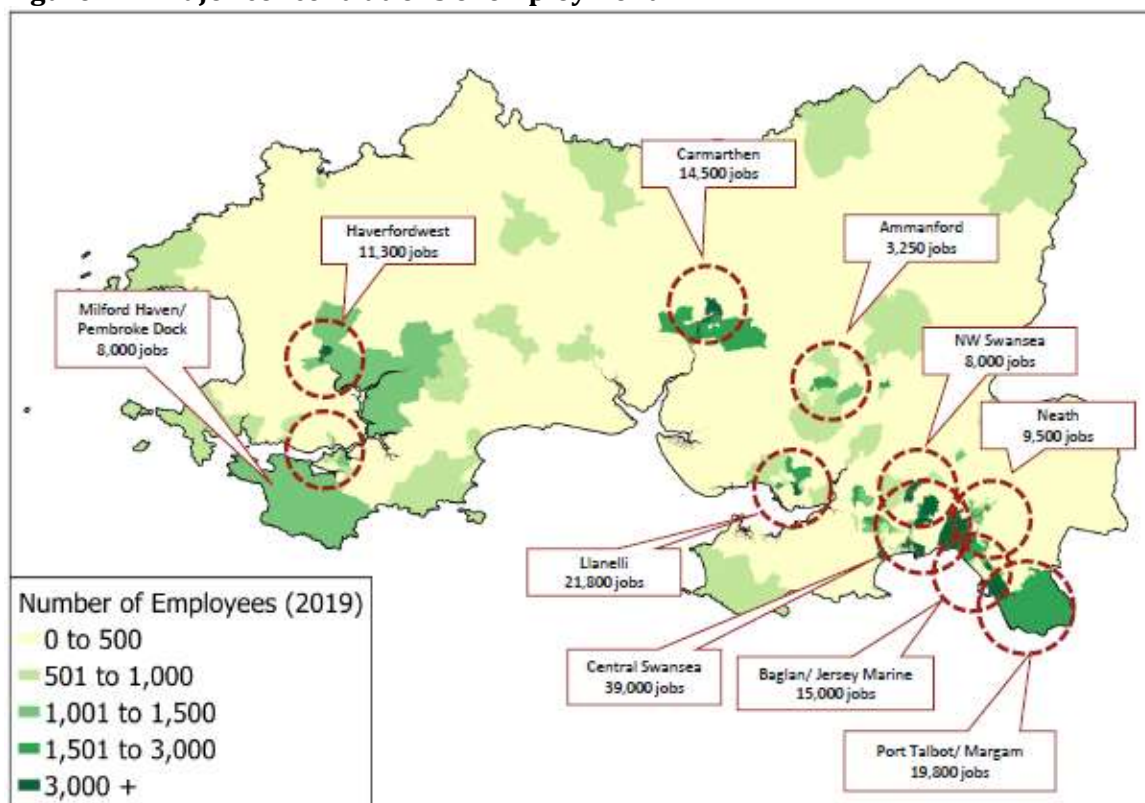
A distinctive heritage and a diverse economy...

- 2.1** With a population of around 705,000 across four counties, South West Wales is a diverse region. Historically, much of the area was an industrial pioneer, driven initially by the coal and metals industries and later by petrochemicals and manufacturing. Over the past 40 years, economic change has meant a challenging period of readjustment, which is to some extent still underway. But our industrial heritage has bequeathed an important legacy, including some of our leading research and innovation capabilities, our large advanced manufacturing sector and the character and form of our towns and cities.
- 2.2** Reflecting the region's population distribution and historic industrial development, the largest concentrations of employment are in the east, around Swansea Bay, as Figure 2-1 illustrates. Swansea itself accounts for around 40% of jobs in South West Wales (and is its main commuter destination), and the area around Swansea Bay and Llanelli is defined in *Future Wales* as a 'National Growth Area' for new jobs and housing⁷. The east of the region also contains a distinctive and extensive concentration of manufacturing activity at Port Talbot, including the UK's largest steel plant and the Port Talbot Waterway Enterprise Zone.
- 2.3** Further west, around 20% of national energy supplies enter Britain via Pembrokeshire, with the Haven Waterway a major centre for existing energy infrastructure and the exploitation of new opportunities. More broadly, Carmarthen and Haverfordwest have important roles as regional centres, supporting an extensive rural economy and food production industry. Reflecting the environmental quality highlighted in Chapter 1, the region enjoys extensive environmental designations, including the two National Parks and AONB and special protections along much of the coast. This environmental quality supports a large, important

⁷ Welsh Government (February 2021), [Future Wales: The National Plan 2040](#), Policy 28. Policy 29 defines Carmarthen and the Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock) as 'Regional Growth Areas'

and growing visitor economy as well as delivering significant wellbeing benefits to our local residents.

Figure 2-1: Major concentrations of employment



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2.4 Across the region, around 208,000 people speak Welsh – about 31% of the total population, and an increase of around 23% in the decade to 2020⁸. The Welsh Government’s *Cymraeg 2050* strategy sets out a positive strategy to develop “a thriving, sustainable economy in rural areas” and to promote the Welsh language through the media and the growth of the cultural sector – a goal recently reinforced by investment in S4C’s headquarters presence in Carmarthen.

... with important links beyond the region

2.5 Connections beyond the region are important too. The ports at Fishguard and Pembroke Dock provide the main gateway between the south of the UK and Ireland. Looking east, there are strong links (and important commuter flows) between the manufacturing clusters at Port Talbot and neighbouring Bridgend; shared issues across the Western and Central Valleys and the South Wales industrial base; and relatively easy access to opportunities in Cardiff and beyond. While our Plan focuses on what is needed *for* the region and *within* the region,

⁸ Reflecting the region’s diversity, the proportion of Welsh speakers is substantially higher in Carmarthenshire, at over 50% of the population.

economic boundaries are fluid: the key point is that South West Wales is not self-contained and homogeneous; it is outward facing and diverse, and it makes sense to work together.

The medium-term economic outlook

- 2.6** This Plan has been developed following the substantial economic shock precipitated by the Covid-19 pandemic. The UK economy contracted by 9.9% in 2020 – an unprecedented fall in annual output in modern times – as public health restrictions effectively closed some sectors (notably hospitality, a key industry in South West Wales). Across the region, the claimant count was 74% higher in December 2020 than it had been at the start of the year, with the full employment impact mitigated by the furlough scheme and the extensive series of business grant, loan and rates relief measures brought in by the Welsh and UK Governments.
- 2.7** At the time of writing, **the outlook for economic recovery from the pandemic is positive.** In July 2021, independent forecasters anticipated UK GDP growth of 6.9% in 2021 and 5.5% in 2022, sufficient to restore the economy to its pre-pandemic size⁹. In South West Wales, the percentage of employments furloughed fell from 12.5% in December 2020 to around 5% in June 2021¹⁰, the claimant count had started to fall, and many employers were reporting staff shortages.
- 2.8** However, the pandemic has accelerated disruptive trends that are likely to have longer-term impacts. Structural changes in the retail sector have impacted on town and city centre uses. Remote working has expanded and is likely to become more permanent – presenting opportunities for people to access a wider range of jobs, but also potentially creating additional housing and service delivery pressures in rural and coastal areas. At the time of writing, the Covid crisis has not come to a conclusion and its consequences are still not yet fully known – but they are likely to have a longer-term influence over the period of this Plan.

The state of the region: Recent economic performance

- 2.9** Looking back over a longer period, the regional economy has grown since the previous Economic Regeneration Strategy was prepared. But on many indicators, there is still a significant gap between outcomes in South West Wales and the rest of the UK. The *Economic and Strategic Landscape Review* which accompanies this Plan explores our recent economic performance in more detail: the following paragraphs provide a snapshot of the ‘state of the region’.

We have seen growth in jobs and economic activity, but there is capacity for more

- 2.10** The 2014 Strategy anticipated a relatively slow recovery in employment terms from the recession following the 2008/09 financial crisis. However, **performance has been much**

⁹ HM Treasury (July 2021), *Forecasts for the UK Economy: A comparison of independent forecasts*

¹⁰ Slightly below the Wales and UK averages, and accounting for around 14,400 employments furloughed.

stronger than anticipated. By 2019, there were some 322,000 jobs in the region, an increase of 20,000 on the 2013 figure. Despite some net job losses in 2016, growth until the start of the pandemic was stronger than in the rest of Wales.

2.11 However, there is still ‘spare capacity’ in the labour market. Although the ‘jobs density’ (the number of jobs per working age resident) has grown steadily, it is still lower than the UK and Wales averages¹¹. Notably, despite Swansea’s importance as a regional centre and inbound commuter destination, the city’s jobs density is low relative to Cardiff and Newport¹².

2.12 There have been steady improvements in the economic activity rate over the past 15 years – at a faster pace than in the rest of the UK. However, **South West Wales’ economic activity rate continues to fall behind the UK average** (and slightly behind the Wales average). If the gap between the 2019 regional economic activity rate (73.8%) and the UK rate (78.9%) could be bridged, it would bring an additional 21,000 people back into the labour market.

Economic output has grown, within the context of structural change

2.13 Economic output (measured in gross value added) was around £13 billion in 2018 – equivalent to 21% of total Welsh output. The region’s GVA increased by around £630 million in 2013-18 (representing growth of about 5% over the period). Within this overall expansion, some sectors grew strongly: combined, wholesale and retail; warehousing; real estate; information and communications; and health and care contributed an additional £689 million to GVA. But some sectors contracted over the period, with the metals, electrical products and machinery sector reducing its output by around £322 million.

2.14 This suggests a continuing process of adjustment within the economy, which is also reflected in employment growth (and a strengthening share of employment) in hospitality, health, distribution and administrative activities. Nevertheless, manufacturing is of fundamental importance to the regional economy, accounting for 13.6% of total output (and over 25% of output in Neath Port Talbot).

There is still a large productivity gap, which impacts on local prosperity

2.15 Productivity (the amount of GVA generated for every filled job) was around £45,100 in South West Wales in 2018. The gap with the rest of the UK has narrowed slightly over time. But it is still substantial: in 2018, productivity was around 80% of the UK level.

2.16 Our analysis of productivity in South West Wales leads to three observations, which are critical to the strategy advanced within this Plan:

- **Productivity growth isn’t ‘everything’ But it is *necessary* for long-term economic wellbeing, even if it isn’t *sufficient*.** More ‘productive’ activities ought to lead to higher

¹¹ 0.75 jobs per resident aged 16-64 in South West Wales in 2019 (compared with 0.77 in Wales overall and 0.86 in the UK).

¹² Swansea’s jobs density was 0.8 in 2019, compared with 0.98 in Cardiff and 0.91 in Newport.

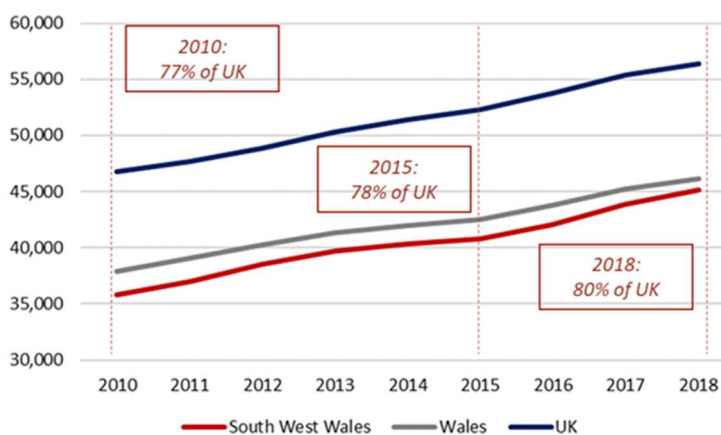
average pay¹³ and more opportunities for people to build careers and businesses in the region. But productivity can be seen as a somewhat abstract measure: a highly 'productive' economy might not necessarily be a sustainable or equitable one, and not everything that society values generates high levels of monetised output. So, as well as generating higher output per worker, **the key challenge is ensuring that the productivity gain is captured locally in pay, conditions and business opportunities.**

- **Productivity growth is not just about growing 'more productive' sectors, or those firms at the leading edge.** The structural shift in South West Wales from relatively high value-added manufacturing to lower value services has presented a long-term challenge. Part of the gap is also explained by the type of activities that take place in different locations within the same industry –

with headquarters activities, research and development and so on typically contributing to higher value output per worker¹⁴. But recent research also highlights the gains that can be made in all sectors (including those within the 'foundational economy' as well as within 'export'-like industries) through investment in management capacity, technology adoption, supply chain capabilities, skills development and so on¹⁵. This is likely to be especially important in South West Wales: in a region with relatively few large firms, **a broad-based approach that supports SME growth and entrepreneurship across the board and increases the local 'stickiness' of investment is likely to be important.**

- **Productivity growth is likely to be gradual over time.** It may be accelerated by major transformational investments – but 'narrowing the gap', and ensuring the gain is captured regionally in higher pay and local business growth, is a long-term endeavour, demanding sustained investment across the economy¹⁶.

Figure 2-2: Productivity: GVA per filled job (£), 2010-18



ONS, Subregional productivity: labour productivity by local authority district and labour productivity by UK NUTS2 and NUTS3 subregions, 2010-18

¹³ Currently, gross median pay in the South West Wales local authority areas ranges between 86% and 92% of the UK average.

¹⁴ Welsh Government (2018), *Welsh Budget 2018: Chief Economist's Report*, p.12

¹⁵ Jurgen Maier (2017), *Made Smarter Review: Report to the UK Government*; Institute for Government (2021), [Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector](#)

¹⁶ Note also the challenges in 'narrowing the gap': other regions will also grow at the same time, and some (principally London and the Greater South East) will have more favourable starting-points.

The evidence reveals mixed progress against wider drivers of productivity

2.17 Linked with the region's overall productivity performance, there has been mixed progress in relation to wider 'drivers of productivity':

In relation to skills...

2.18 Recent years have seen a strong emphasis on strengthening links between providers and employers, with the Regional Learning and Skills Partnership playing an increasingly important role in brokering relationships, identifying employer need and providing better labour market intelligence¹⁷.

2.19 **Over time, there has been a steady improvement in qualification levels:** in 2019, 35% of the working age population was qualified to NVQ4+, compared with 22% in 2004, and the proportion with no qualifications halved over the same period (partly as new entrants to the labour market gradually replace those who leave). But in *relative* terms, there is still a gap with the rest of the UK¹⁸, and substantial variation across the region¹⁹.

In relation to connectivity...

2.20 **There has been transformational progress in the delivery of digital connectivity** since the 2014 Regeneration Strategy. Commercial investment and public support through Superfast Cymru and successor programmes have increased access to superfast broadband to over 90% of premises. However, beyond superfast, there is still a significant rural/urban digital divide, with ultrafast penetration in Pembrokeshire among the lowest in the UK²⁰. The Digital Infrastructure programme across South West Wales aims to address this – but applications for new technology continue to advance rapidly: staying ahead of the curve will be important as digital technology transforms working practices and business models.

2.21 The picture is perhaps less positive in relation to **transport connectivity**. There has been some disappointment in the scaling back of plans to electrify the South Wales Mainline to Swansea. However, proposals are being advanced to take forward the **Swansea Bay and South Wales Metro** as the core of a better-integrated regional transport system (highlighted further in Chapter 4); Transport for Wales plans to increase services between Swansea and Manchester from 2022; and work progresses in taking forward active travel measures across the region. While the future policy presumption is against new strategic road schemes, investment has started on much-needed improvements to the A40 in Pembrokeshire and

¹⁷ See South West Wales RLSP (2019), [Regional Employment and Skills Plan 2019](#)

¹⁸ Between 2004 and 2019, the gap between South West Wales and the UK actually widened, from 3.6pp to 4.8pp.,

¹⁹ For example, in 2019, only 29% of the Neath Port Talbot 16-64 population was qualified to NVQ4+, compared with 37% in Swansea.

²⁰ In September 2020, around 77% and 58% of premises in Swansea and Neath Port Talbot respectively were able to access 'ultrafast' download speeds of up to 300 Mbps, although this is largely confined to urban areas where it is commercially viable.

beyond the region, major improvements on the A465 Heads of the Valleys road are improving connectivity with the English Midlands.

In relation to the business stock...

2.22 The size of the region's business base grew in the years leading up to the start of the pandemic. In 2020, there were around 23,800 active enterprises in South West Wales, a number that had steadily increased over the preceding five years – and survival rates keep pace with the rest of Wales and the UK. But the region's 'enterprise density' (the number of enterprises relative to the working age population) and the start-up rate remain lower than in the rest of the UK²¹. Recent research has highlighted that while overall entrepreneurial activity in Wales is broadly in line with the rest of the UK, there is a shortfall in perceptions of the availability of good start-up opportunities²².

In relation to sites and premises for business growth...

2.23 South West Wales benefits from some substantial sites for industrial expansion, including the large strategic site at Baglan Energy Park, future phases of the Cross Hands development in Carmarthenshire, and key sites at Felindre and Fabian Way in Swansea and the Haven Waterway. However, **there is a widely-recognised gap between demand and supply for industrial sites and premises**, as low rents (and in some cases high remediation and infrastructure costs on ex-industrial land) make viability challenging, especially west of Swansea. The evidence is that this acts as a brake on business expansion, both to new investors and to existing local businesses seeking 'grow-on' space²³.

Inequalities remain significant

2.24 Despite jobs growth over time and improvements in economic activity, recent research highlights the extent to which rising living costs (especially housing costs) have impacted on the real incomes of the lowest paid, a situation which has accelerated during the pandemic²⁴.

2.25 Across the region, concentrations of disadvantage are significant, principally in the main urban centres of Swansea, Llanelli, Neath, Port Talbot and Pembroke Dock, and in the upper Western Valleys. Many of these concentrations are persistent over time and reflect the long-term impact of industrial change: while they highlight the importance of 'supply-side' measures to reduce economic inactivity and bring people back into the labour market, most

²¹ In 2020, there were 11 business starts to every 100 active enterprises, compared with 14 in the UK overall.

²² Karen Bonner *et al* (2018), [Global Entrepreneurship Monitor UK: Wales report 2018](#)

²³ SQW/ Welsh Government (March 2020), [Commercial Property: Market analysis and potential interventions](#)

²⁴ Bevan Foundation (June 2021), [A snapshot of poverty in spring 2021](#)

households on low incomes are already in work²⁵. For a regional economic strategy, **driving demand and creating “better jobs, closer to home” is a key goal and challenge**²⁶.

Building on strengths: Key assets

2.26 Overall, the review of economic performance over recent years suggests good progress, especially in terms of job creation. But there is a persistent gap in outcomes between the region and the rest of the UK. This is partly because most change is incremental: the investment secured through City Deal (for example) will not yet have translated into improvements in the economic data. It also reflects the ‘structural’ nature of many of the region’s challenges, some of which (including the productivity deficit) are shared with other parts of Wales and the North of England.

2.27 However, South West Wales contains some **distinctive economic strengths and opportunities** which provide a good platform for future growth. Realising each of these presents a challenge for future strategy, which we have set out below.

We have nationally and internationally significant university research assets

2.28 There is a strong higher education presence in the region, anchored by Swansea University and University of Wales Trinity St David’s campuses in Carmarthen and Swansea²⁷. Both universities have expanded in recent years, have made an important contribution to the region’s physical regeneration (e.g., through the Swansea Bay campus and the SA1 development in Swansea city centre) and are key economic ‘drivers’ in their own right.

2.29 Beyond this, Swansea University’s research is ranked as ‘world leading’ in several (mostly STEM-related) subjects²⁸. Across both universities, key research capabilities relate to:

- **Advanced data science**, where Swansea’s assets include the Computational Foundry (bringing together computer science and mathematical expertise, and working with industry) and the CHERISH-DE Digital Economy Centre.
- **Health and medicine**, with a strong focus on the application of data science in health, linked with wider computer science expertise, and including one of six Health Data Research UK (HDR-UK) sites nationally.
- **Engineering and manufacturing**, especially in materials research, and with relevance to the energy and decarbonisation opportunities discussed further below.

²⁵ Joseph Rowntree Foundation (November 2020), [Briefing: Poverty in Wales 2020](#) (Annex A)

²⁶ “Better jobs, closer to home” is a stated Welsh Government objective, as set out in the *Economic Action Plan* and the Valleys Task Force strategy *Our Valleys, Our Future*.

²⁷ In addition to a smaller University of South Wales presence at the Hydrogen Centre in Baglan.

²⁸ Swansea University is assessed as ‘world-leading’ in 14 units of assessment within the 2014 Research Excellence Framework.

2.30 There is a long history of collaboration between both universities and local industry, especially in the manufacturing sector. Examples of recent programmes include ASTUTE 2020, supporting industrial research, development and innovation in manufacturing businesses; and UWTSD’s Manufacturing for Advanced Design Engineering (MADE) programme, designed to support collaboration with SMEs. Many industrial collaboration initiatives have been supported with European funding: as this draws to a close, **it will be important to maintain the momentum and capacity that has been built up in recent years, while expanding opportunities for collaboration across the wider regional SME base.**

2.31 The commercial research base is somewhat smaller. But there has been investment in recent years (for example, TWI’s Technology Centre Wales and Advanced Engineering Materials Research Institute at Baglan), adding value to the university-based presence.

Our energy infrastructure is extensive, and we have some of the UK’s greatest low carbon energy generation potential

2.32 South West Wales has long had an important energy sector, especially associated with Pembrokeshire’s oil and gas industry. The infrastructure and skills associated with this will be important in taking advantage of the region’s vast potential in renewable energy. Several opportunities are currently being developed through the emerging South West Wales Regional Energy Strategy. These include:

- **Wave and marine energy off the Pembrokeshire coast**, with a series of commercial and pre-commercial projects underway and in the pipeline
- **The proposed Dragon Energy Island** scheme in Swansea Bay, offering scope for tidal, wave and potentially solar energy generation
- **Onshore capacity**, including the UK’s largest onshore wind farm at Pen-y-Cymoedd and a range of opportunities in wind, biomass and waste-to-energy.

2.33 There is also substantial research and development capacity to support the region’s renewable energy potential. The Offshore Renewable Energy (ORE) Catapult has a presence at Pembroke Dock and, with several other universities, is engaged in progressing new opportunities off the Pembrokeshire Coast. Swansea University’s SPECIFIC Innovation and Knowledge Centre has expertise in the capture and storage of solar energy, while the University of South Wales’ Hydrogen Centre at Baglan is supporting the experimental production of hydrogen energy storage systems.

2.34 Our energy potential is therefore a key asset to exploit – both for South West Wales and indeed the rest of Wales and the UK. **The challenge over the next few years will be in realising the opportunity, recognising that some technologies remain relatively nascent – and in ensuring that the benefits can be captured locally.** A long-term perspective will also be important in developing business cases for some of the region’s major energy projects –

recognising that while they have the potential to be transformational, the full benefits may take several years to be realised

Our business community offers scope for growth

- 2.35** We noted earlier the region's relatively low levels of enterprise density and its relatively low start-up rate. But **business is central to future economic strategy** – put simply, employment is either created by existing businesses expanding, new businesses starting up, or businesses from elsewhere deciding to locate in the region.
- 2.36** Recent years have seen the loss of some larger, externally-based firms (note, for example, recent job losses in some of the region's automotive supply chain). We retain relative strengths in manufacturing, food production and hospitality, with evidence of start-up and inward investment activity linked with the data science strengths highlighted above²⁹. However, the region's business stock is broadly-based: 'high growth' SMEs are quite widely distributed across sectors (and across the region)³⁰; ownership models are diverse³¹; and there are opportunities for productivity growth across the sectoral landscape³². Following our analysis of the 'productivity deficit' above, **the challenge is to strengthen the 'breadth and depth' of the business base, recognising scope for growth across the economy, including (but not just) in those activities at the 'leading edge' of technology and innovation.**

Environmental quality and 'sense of place' are key assets

- 2.37** South West Wales' combination of 'place-based' assets is distinctive and rich, including the National Parks, the coastline, the sport and leisure offer and a university city offering both 'compactness' and a wide range of metropolitan amenities.
- 2.38** Beyond this range of functions and amenities, **the region's distinctive identity forms an important part of the offer.** There are two aspects to this:
- First, **'quality of life' offer clearly forms part of the proposition to visitors, investors and potential new residents**, and one which plays a key economic role. There is an important balance to be struck between environmental quality and community and environmental sustainability.
- Second, **the region's identity relates to the importance of 'community', the associations that businesses and other institutions have with the places in which they are based**, and the stake that they have locally. This is harder to pin down in conventional economic terms, but relates to the extent to which value and ownership can

²⁹ See the *Evidence and Strategic Landscape Review* for further examples.

³⁰ SQW analysis of regional distribution of [FastGrowth 50](#) award winners, 2009-20; Beauhurst records of 'fast growth' firms in South West Wales

³¹ Consultation as part of the development of this Plan. See also [Co-operatives Wales](#)

³² Institute for Government (2021), [Productivity: Firing on all cylinders – why restoring growth is a matter for every UK sector](#)

be captured or embedded locally and the challenges in growing the business and employment base highlighted above³³.

Looking to the future: Key transformational trends

2.39 Future strategy will also be influenced by wider ‘transformational’ factors that will impact all aspects of economic life. While these apply to all advanced economies, the way in which they are addressed and how they interact with our existing economic structure and strengths will be fundamental. Three ‘macro trends’ are especially important, relating to **decarbonisation**, **digitalisation** and **demographic change**. We consider each in turn below.

Decarbonising South West Wales

2.40 As we highlighted in the earlier overview of the policy context, the UK and Welsh Governments’ commitment to net zero by 2050 will have an impact on all aspects of policy.

2.41 In headline terms, Wales has been successful in reducing carbon emissions while maintaining economic growth: between 1990 and 2018, total CO₂ emissions fell by 20%, and the country was on track to meet its 2020 carbon reduction targets³⁴. However, around 85% of the cut in emissions came from the power sector³⁵. While most other sectors also achieved reductions (especially manufacturing), these were substantially smaller, and the surface transport sector actually generated a net increase. Looking to the future and the net zero commitment, the Climate Change Committee recommended a “*leadership driven pathway*” requiring far-reaching action over the next thirty years³⁶.



The actions required to achieve the targets – including full decarbonisation of the power sector, full switchover to electric vehicle sales, installation of low-carbon heating, and decarbonisation of manufacturing – go beyond those required from the world on average, in line with Wales’ responsibility as a richer nation with larger historical emissions.



Climate Change Committee

2.42 This presents South West Wales with some distinct challenges. Currently, **regional carbon emissions are much higher than the Wales and UK average**. These mostly reflect the role of the huge Tata works at Port Talbot, an industrial installation of national significance that remains reliant on coal inputs. **The challenge for future strategy is enabling the transition of the region’s industrial base, while ensuring wider action to decarbonise the transport, housing and manufacturing systems** – and making sure that South West Wales

³³ This is also at the centre of discussions about the concept and role of the foundational economy. See Joe Earle *et al* (2017), [What Wales Can Do: Asset-based policies and the foundational economy](#) (CREW/ Foundational Economy)

³⁴ Climate Change Committee (December 2020), [Progress Report: Reducing emissions in Wales](#)

³⁵ Principally through the decommissioning of the Aberthaw coal-fired power station

³⁶ Climate Change Committee (December 2020), [Advice Report: The path to a net zero Wales](#)

remains competitive with other regions. Our renewable energy potential will play an important role in this, which we explain further in Chapter 4.

Digital transformation

2.43 **'Digitalisation'** refers to the transformation of the economy through massively increased use of data and the development of digital technologies such as artificial intelligence, machine learning and robotics. Digitalisation isn't about change within a single industry; rather, it is about the use of 'general purpose' technologies with a wide range of applications across industries.

2.44 Digital transformation is not new: the period since the publication of the last Swansea Bay Economic Regeneration Strategy has seen a transformation in the everyday use of new digital technologies, and it has been recognised as a key driver of economic strategy for some time. Three aspects of the transformational impacts of digitalisation are especially relevant:

- **Disruptive effects on industry:** Use of digital technology leads to greater efficiency, with firms that have the capacity and capability to invest and adopt more likely to benefit from productivity gains and improved competitiveness. But its 'transformative' power is in the convergence of technologies to drive entirely new industries (wearable devices or gaming, for example), which in turn drive applications elsewhere. A consequence is the breakdown of traditional industry sectors and markets, leading to a recognition of digitalisation as the 'fourth industrial revolution'.
- **Impacts on the labour market:** Estimates of the potential impact of automation on jobs vary greatly, although most studies suggest that while new technologies will substitute for labour in some sectors, this is likely to be more than offset by job creation³⁷. However, technology is changing the way in which work is done, with the potential for positive and negative impacts on working conditions; the need and opportunity for job changes over the course of the working life; changing demand for skills; and the ability to work remotely.
- **Impacts on services,** potentially helping to overcome relative remoteness, and including the development of new ways of accessing health and care, which in turn impact on the development of new goods and services and demand for jobs.

2.45 Across all of these, the message for future strategy is that responding to digitalisation is not just about ensuring the 'supply' of new technology and connectivity (although that is important). It is also about **driving economic demand for new skills and technologies** – both at the 'leading edge' of innovation and throughout the economy.

³⁷ Welsh Government (September 2019), [Wales 4.0: Delivering economic transformation for a better future of work](#) (Professor Philip Brown's review of digital innovation for the economy and the future of work in Wales), pp.22-26

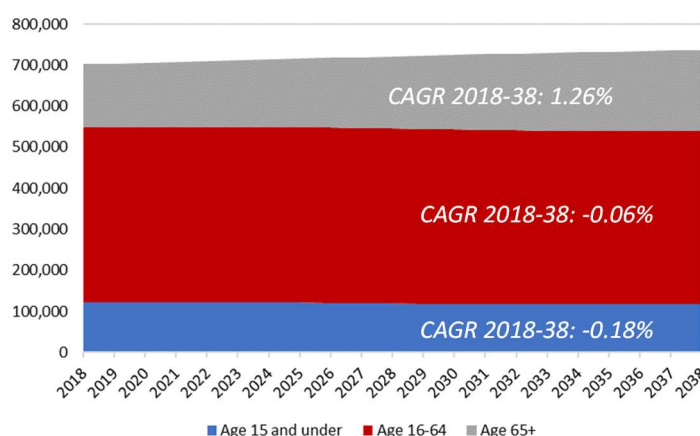
Responding to demographic change

2.46 South West Wales has a growing population. However, the ‘working age’ population has fallen slightly over the past decade. Over the next 20 years, the ‘working age’ population is expected to fall by around 1%, representing a net loss of around 4,700 people aged 16-64 over the period³⁸.

2.47 The gradual ageing of the population is a long-term trend. Key implications for future economic strategy include:

- Changing working lives:** The concept of ‘working age’ is becoming increasingly fluid, as people work for longer, and more flexibly (although individuals’ ability to work for longer will depend on job type and conditions and the ability to adapt to new roles and technologies over time).
- Changes in service demand:** As the analysis of recent economic performance demonstrates, there has been strong growth in employment and output associated with health and social care, as demand increases from an ageing population. Changing demographics will support changes in wider demand for goods and services as well.
- Rising dependency ratios:** While changing demographics are driven by life expectancies and birth rates, they also partly reflect the balance of migration, with gradually falling populations in some post-industrial and rural communities, and in-migration, especially from older people, along parts of the coast³⁹. This is a gradual process – but retaining and attracting younger people also helps to support community resilience and sustainability, and itself depends on generating local economic activity and demand.

Figure 2-3: Population change (compound annual growth rates) by age group, 2018-38



Source: StatsWales, 2018-based population projections

Bringing it together: key issues for the Delivery Plan

2.48 Summarising the ‘state of the region’, our key assets and the long-term ‘macro’ trends that will impact across the economy, we can see that:

³⁸ Although note that the picture varies across the region, with a sharp projected fall in the working age population in Pembrokeshire, but continued growth in Swansea.

³⁹ Gerald Holtham (June 2021)), [Rejuvenating Wales](#) (Hodge Foundation/ CLEC)

- **The region's weaknesses are largely 'structural'**. They are linked with processes of long-term industrial change, are shared with many other parts of the UK, and map onto the region's relatively low productivity.
- Set against this, **there has been strong progress in recent years**, especially in creating new jobs and in driving forward transformational projects. This provides a strong foundation on which to build.
- **South West Wales enjoys some distinctive strengths and opportunities** – especially linked with the region's renewable energy potential, university - industrial links and its quality of life offer. These also have the potential to make a positive impact in relation to the long-term environmental, technological and demographic trends.
- **There is a 'window of opportunity' to build on and capture some of these strengths.** Some are still at a relatively early stage (for example, elements of the renewable energy opportunity and the potential for industrial decarbonisation), but the technology is developing fast, and some other regions will offer fierce competition for investment.
- **We are a very diverse region**, with a distinctive balance of urban, rural, national park, coastal and industrial assets. But there is substantial commonality across South West Wales, and some of our big opportunities have a region-wide footprint. Some also extend beyond the region itself, and outward-facing links will be important.
- **'Transformational' growth opportunities need to be balanced with the conditions for incremental improvements in business resilience and capacity** across the regional economy. There are some distinctive opportunities at the 'leading edge' – but long-term employment resilience and wage growth will depend on the sustainability, productivity and expansion of the wider stock of regional SMEs – not just the 'pioneer' firms.

2.49 Based on this understanding of our economy and its potential, the next chapter introduces our strategic framework, to guide our actions over the next decade.

3. Our ambitions to 2030

Building on the evidence base, this chapter introduces our ambitions for the South West Wales economy. It explains the changes that we want to see over the next decade and introduces the three 'Missions' that will guide our shared activity.

From the evidence to a strategic framework...

- 3.1** Over the next ten years, we seek to build on the distinctive strengths and opportunities identified in the previous chapter to develop a more prosperous and resilient economy. To help plan for the future, we have identified three **Ambitions** (statements about the nature of the South West Wales economy that we want to work towards), supporting three **Missions** (priority areas on which our shared **Delivery Plan actions** will be focused):

Figure 3-1: Our Ambitions and Missions



Source: SQW 2021

Unpacking our Ambitions

- 3.2** Our three Ambitions are broadly cast. They recognise that achieving sustainable, long-term prosperity and the “South West Wales we want” is about more than the pursuit of economic growth as a goal for its own sake – and that prosperity will itself be enabled by progress across a number of fronts.
- 3.3** Our Ambitions seek an economy that is, over the long term, more resilient and sustainable; enterprising and ambitious; and balanced and inclusive.

Table 3-1: Unpacking our Ambitions: The economy we want**Resilient and sustainable**

- **Resilient to technology change and the impacts of digitalisation:**
 - Supporting firms in adopting and adapting to new technology
 - Building labour market resilience through the skills system from schools through to adult learning
- **Resilient to climate change and decarbonisation:**
 - Increasing the resilience of the region's manufacturing base (including in its (currently) relatively carbon-intensive foundation industries)
 - Supporting adaptation and adoption throughout the economy (across sectors and through the building stock and transport system)
 - Delivering robust digital connectivity to support changing working practices and better access to employment.
- **Supporting resilient and more 'embedded' firms and supply chains**
 - Developing the local business base through access to support, finance, networks and procurement
 - Embedding best practice and resilience throughout the supply chain
 - Continuously building management capacity and capability.

Enterprising and ambitious**Enterprising and ambitious**

- **Ambitious in relation to our long-term energy opportunity**
 - Ensuring capacity to drive forward our potential
 - Integrating our natural renewable energy advantages with our university and industrial strengths
- **Enterprising in relation to changing market conditions, technology and opportunities**
 - Investing in the skills system across the economy and driving demand for higher level and technical skills, as well as influencing supply
 - Investing in the commercial property stock – for local businesses scaling up as well as new investors
- **Driving new investment, innovation and funding models**
 - Developing sustainable alternatives to European funding
 - Promoting the region as a location to invest, work and visit

Balanced and inclusive**Balanced and inclusive**

- **Balanced between innovation at the leading edge and sustainable growth across the economy**
 - Developing opportunities for 'new to the firm' innovation, as well as R&D and new technology and product development
 - Recognising the opportunity for a diverse range of business and ownership models
- **Balanced spatially, across the region**
 - Celebrating regional diversity and a wide distribution of opportunity
- **Creating long-term growth, while sustaining and enhancing core environmental and community assets**
 - Recognising and enhancing the inherent value of the environment to the quality of life and quality of place proposition
 - Supporting community ownership of economic assets, where this can support local opportunity and generate a sustainable return.

Realising our Ambitions

- 3.4** The Ambitions set out above are extensive, and are consistent with the Wellbeing of Future Generations Act. They are also all interlinked: they are not so much ‘themes’ as a vision of how we want the economy to evolve. Over the next ten years, **all the actions that the South West Wales local authorities take in support of regeneration and economic development will contribute to achieving them** – whether they are delivered at regional scale, or are more locally focused.
- 3.5** But to deliver our overall goal of a more “resilient and sustainable; enterprising and ambitious; and balanced and inclusive” economy, there are clear actions on which we will need to focus over the next decade. We have called these our three **Missions**, which we will use to guide delivery. These are:
- Establishing South West Wales as a UK leader in renewable energy and the development of a net zero economy
 - Building a strong, resilient and ‘embedded’ business base
 - Growing and sustaining the experience offer.
- 3.6** The following chapters explain each Mission, setting out what we seek to achieve, the opportunities, challenges and risks that we need to address, and the solutions and projects that we aim to progress. Although we explain each Mission in turn, they should be seen as integrated: establishing South West Wales as a UK leader in renewable energy and a net zero economy is, for example, a key aspect of the other two Missions.

4. Mission 1: A UK leader in renewable energy and the net zero economy

Looking to 2030, we aim to make South West Wales a UK leader in renewable energy. That means taking advantage of our natural assets and our industrial and R&D capabilities to build an internationally-significant presence in future fuel technologies and to drive the decarbonisation of our industrial base and the wider economy.

Figure 4-1: Summary of assets, opportunities, challenges and actions

Current assets	Next opportunities	Key challenges	Key actions
Concentration of onshore and offshore opportunities at different stages of market readiness Emerging Regional Energy Strategy and Welsh Government support University R&D assets and growing corporate capacity for industrial decarbonisation	Linking energy generation with industrial decarbonisation Making the most of opportunities presented by the existing knowledge/research base Translating early stage projects into investable propositions	Countervailing pressure of existing high carbon intensity industry Securing/ maintaining capacity to drive the strategic agenda, and major projects forward Competition from (and establishing collaborations with) other regions Securing Government support	Additional capacity to drive forward the agenda Progressing the region's major renewable energy generation projects Attracting and driving forward new industrial investment Decarbonising transport and the housing stock

Understanding the case for the Mission: the core rationale

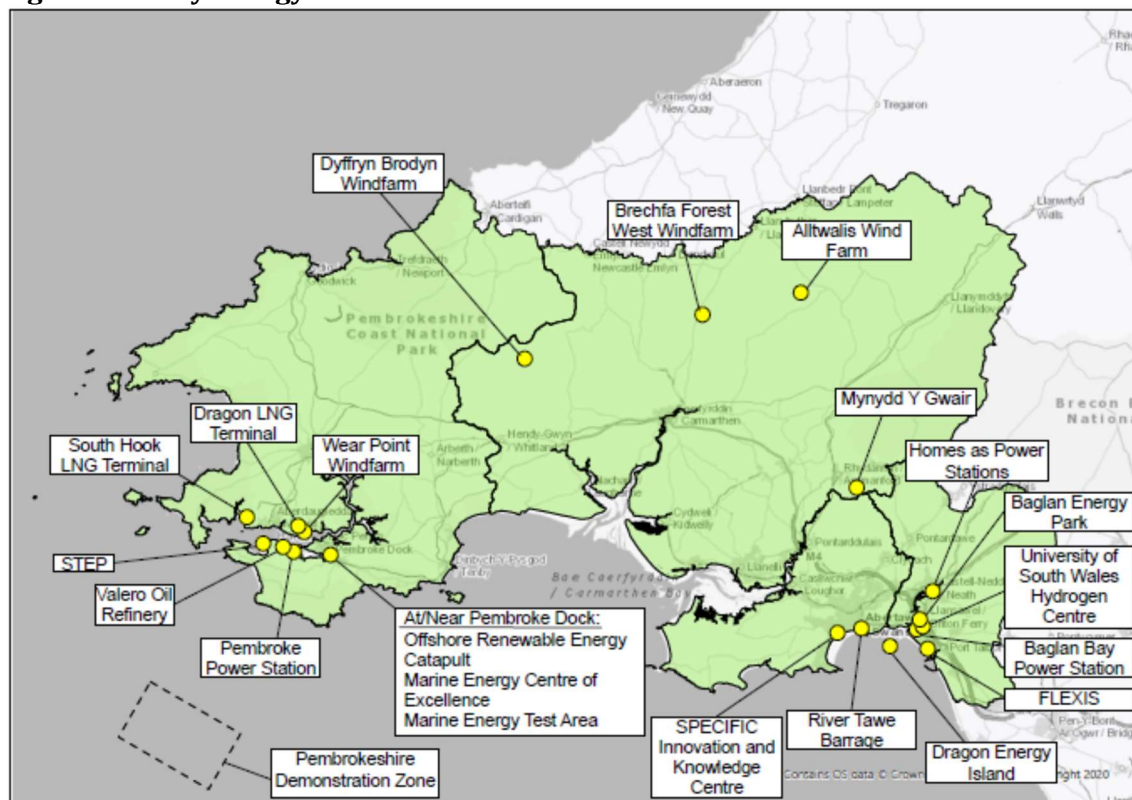
- 4.1** As set out in the evidence base the decarbonisation imperative is global, and in Wales is mandated by the UK and Welsh Governments' net zero commitments and the need to take urgent action now. There is a clear overall policy direction, which has been reinforced by the emerging suite of strategies at UK Government level ahead of COP26 in autumn 2021⁴⁰ and by the renewed and re-emphasised climate change focus of the Welsh Government. With a clear and compelling direction of travel, there is an opportunity for South West Wales to capitalise on its renewable energy assets and ensure that it is on the 'front foot' in adapting to change.

Delivering the region's low-carbon energy projects at scale

- 4.2** In South West Wales, our potential is clearly articulated, and is linked with both our natural environmental assets and infrastructure and skills base resulting from our long history in energy-related activity. The range of existing and emerging projects and assets is extensive, as illustrated in Figure 4-2:

⁴⁰ For example, the new [UK Hydrogen Strategy](#) (August 2021)

Figure 4-2: Key energy assets



Source: Produced by SQW 2021. Licence 100030994 Contains OS data © Crown copyright [and database right] [2020]

4.3 Key renewable energy assets include the combination of marine energy activity associated with **Pembroke Dock Marine** and the proposed tidal, wind and potentially solar energy scheme at **Dragon Energy Island** in Swansea Bay. They also include a range of onshore wind and waste-from-energy schemes across the region, and a potential nuclear fusion prototype scheme in Pembrokeshire. The **Hydrogen Centre** at Baglan focuses on experimental development of renewable hydrogen production and storage, as well as R&D in hydrogen vehicles, fuel cell applications and energy systems. The **Flexible Integrated Energy Systems (FLEXIS)** project is delivering a smart energy demonstration zone in Port Talbot, focused on local energy systems, heat recovery and the adoption of low emission vehicles.

4.4 However, while the scale of activity is substantial, there is a risk that the potential may not be fully realised, for three reasons:

- **Technologies are, in some cases, at a relatively early stage.** They are also complex, and in many cases will require long-term funding, commercially or from Government. Some of this will need to come forward in conditions of some uncertainty: for example, the Welsh Government's *Hydrogen Pathway* notes that *"there is uncertainty regarding the exact role hydrogen will have in supporting decarbonisation in Wales.... [but despite this], there is still an urgent need to take the first steps to develop the skills, expertise and supply chain for hydrogen scale-up in Wales"*⁴¹.

⁴¹ Welsh Government (January 2021), [Hydrogen in Wales: A pathway and next steps for developing the hydrogen energy sector in Wales](#). (consultation document), p,11

- **Competing areas and technologies may move faster** within this dynamic technology environment. South West Wales has distinctive assets – but if additional capacity and investment is directed elsewhere, some of these advantages could diminish.
- **Local benefits are not *automatically* captured through the energy generation process.** The good news is that there is a solid R&D base in South West Wales to capitalise on the opportunity (see, for example, the Hydrogen Centre referred to above; Swansea University’s SPECIFIC Centre), as well as schemes (such as the Marine Energy Engineering Centre for Excellence project at Pembroke Dock) to build supply chain opportunities with SMEs. It will be important that these are driven hard, to ensure that the region benefits from the added value of renewable energy investment.

4.5 Delivering the region’s renewable energy opportunities at scale – and ensuring that they are integrated with wider policy and maximise local benefits for local businesses and communities will be central to regional strategy over the coming years:

Key action areas

- **We will build capacity and expertise to maximise South West Wales’ renewable energy and net zero potential.**

There are several public bodies with knowledge and expertise, including (for example) the Welsh Government Energy Service and Marine Energy Wales, as well as UK Government agencies such as the ORE Catapult. But the agenda is complex: establishing a regional ‘decarbonisation system’ could help to address region-wide goals (including in relation to skills and infrastructure) and coordinate investment priorities beyond the delivery of specific initiatives.

- **We will seek to secure new investment in renewable energy infrastructure**

Linked with the capacity building described above, we will work with the Welsh and UK Governments and with the private sector to make the case for investment in ‘nationally significant’ schemes such as Dragon Energy Island and the Pembrokeshire marine proposition, as well as smaller-scale schemes, including on public land.

- **We will work to deliver the Regional Energy Strategy**

The Regional Energy Strategy has been developed in parallel with this Plan and will be published in 2021. We will work to take forward pilot and successor Local Energy System projects (such as the pilot currently underway at Milford Haven Energy Kingdom), and we will seek to link the energy system objectives of the Energy Strategy with opportunities for local business engagement and supply chain development.

Decarbonising our industrial base

- 4.6** The high carbon intensity of some of South West Wales' industrial activity is a vulnerability: while the region's relatively high carbon emissions in the data is largely caused by the steel industry, oil and gas are also important to the region, as well as our large manufacturing base.
- 4.7** Work is currently underway to develop a programme for industrial decarbonisation through the **South Wales Industrial Cluster (SWIC)** initiative, funded by UK Research and Innovation and including several energy and heavy industrial firms in South West Wales (including Tata, Valero and RWE, the operator of the Pembroke refinery)⁴². The focus of the programme is on the production and use of hydrogen and on mechanisms to secure large-scale industrial decarbonisation through 'fuel switching': as with some of the initiatives discussed above, the proposition is in its relatively early days, although achieving large-scale change will be important for the region's future competitiveness. More broadly, there is an opportunity to attract additional investment into the region, beyond the decarbonisation of the existing stock: 'transformational' projects such as the forthcoming **Global Centre for Rail Excellence** provide examples of investments supported with public funds, but the existing combination of energy-related activity will be an important factor in attracting new business locations.
- 4.8** Building on the region's growing presence in renewable energy and the current focus on industrial decarbonisation:

Key action areas

- **We will progress the opportunity presented by SWIC and seek to secure future investment to support the region's future industrial competitiveness**

As with other aspects of the low carbon agenda, technology is developing rapidly and the scale of investment in demonstration projects and initiatives such as SWIC is substantial. Through our increased capacity to drive forward the decarbonisation agenda, we will seek to secure sequential investment, working with the UK and Welsh Governments as appropriate.

- **We will grow the wider low carbon industrial base and promote the region's potential to new investors**

Linked with actions to promote the region as an investment destination, we will highlight our potential to new investors (including our university presence, skills base and access to sites and premises) and will press forward major proposed investments such as the GCRE.

⁴² <https://www.swic.cymru/news>

Decarbonising the wider economy

4.9 Decarbonisation will extend beyond the industrial base, and will impact on housing and domestic heating, non-domestic properties and the transport network. Much is already underway:

- In relation to the **housing stock**, Pobl Housing is leading one of the UK's largest community-based retrofit, energy generation and smart energy management projects at Penderry, Swansea, the outcomes of which will inform the larger, City Deal-funded Homes as Power Stations scheme.
- In relation to **transport**, all the local authorities are engaged in programmes of fleet decarbonisation, and the **Swansea Bay and South West Wales Metro** will be at the core of the region's lower carbon, more sustainable transport system.
- In relation to **re-using and preventing waste**, Wales already has some of the world's highest municipal recycling rates – with all South West Wales authorities (and Wales as a whole) experiencing a rapid increase in recycling rates over the past twenty years⁴³.

4.10 Linked with the Regional Energy Strategy, over the coming years:

Key action areas

- **Building on existing schemes, we will progress the decarbonisation of the housing and business stock**

From an economic development perspective – and our wider ambitions to secure a more 'embedded and resilient' business base, this should provide opportunities for local supply chain development and community-based employment solutions (as well as, in some cases, local community ownership).

- **We will press forward the development of Swansea Bay and South West Wales Metro**

As well as the Metro itself, this will lead to a better integrated and more sustainable transport network through the incorporation of bus and active travel services and the development of opportunities to work and access services closer to home.

- **We will work to achieve a circular economy**

Building on our performance in reducing waste and transforming recycling rates, there are opportunities to increase re-use of goods and materials offering potential for community-based solutions to increase repair and the use of technology to increase the scope for re-use of materials and reduced food waste.

⁴³ Welsh Government (2019), [Beyond Recycling: A strategy to make the circular economy in Wales a reality](#); StatsWales (2021), [Combined municipal re-use, recycling and composting rates](#)

5. Mission 2: Building a strong, resilient and embedded business base

Business is at the centre of our strategy to 2030: it will be through the expansion of existing firms and the start up and attraction of new ones that new employment will be generated and productivity growth secured. That means supporting sustainable business growth– both at the ‘leading edge’ of technology and innovation and across the economy.

Figure 5-1: Summary of assets, opportunities, challenges and actions

Current assets	Next opportunities	Key challenges	Key actions
<p>Strong university-industrial links</p> <p>Local business networks, emerging clusters and some anchor businesses</p> <p>Growing policy interest in encouraging locally ‘embedded’ businesses and local supply chains</p> <p>Wales-wide institutions (e.g., Development Bank)</p>	<p>Supporting dynamism (through entrepreneurship and early-stage expansion)</p> <p>Supporting resilience (through technology adoption, management capacity and succession)</p> <p>Supporting local supply chain development</p> <p>Building an effective (and broad) innovation ‘ecosystem’</p>	<p>Weak ‘infrastructure’ offer (e.g., commercial property, impeding start-up and expansion)</p> <p>Skills and capacity challenges</p> <p>Limited private sector support base</p> <p>Access to growth finance</p> <p>Barriers to commercialisation</p> <p>Limited business density and ‘leakage’ out of region</p>	<p>Accelerated adoption and innovation support (linked with recommendations of Wales 4.0 in relation to business, skills and innovation support)</p> <p>‘Progressive procurement’ within a local business and supply chain development system</p>

Understanding the case for the Mission: the core rationale

- 5.1** The review of the evidence in Chapter 2 highlighted positive employment outcomes in recent years, growth in the business stock, and a strong record in translational research activities between the university knowledge base and industry.
- 5.2** However, the economy remains to some extent in a process of ‘restructuring’, away from traditional strengths in parts of the manufacturing sector and towards growth in areas such as information and communications and health care (as well as in activities linked with the growing energy sector highlighted in Mission 1). Changing trading relationships also present challenges (notably, but not only, in agriculture and food production), some of which have yet to fully work through)⁴⁴.
- 5.3** This transition will bring opportunities within those sectors that are growing – and as highlighted earlier, opportunities for growth and productivity gain are cross-sectoral. However:

⁴⁴ Janet Dwyer (2018), [The implications of Brexit for agriculture, land use and rural areas in Wales](#) (Wales Centre for Public Policy)

- Even where job losses in one industry are replaced with jobs in another, there is the risk that they may not generate the same level of output (and therefore command the same pay).
- The wider economy of South West Wales has a *relatively* narrow business base: business density is relatively low, and there are few indigenous large or larger medium-sized businesses. However, the prospect of inward investment at scale has reduced over the past twenty years. The risk is that as the economy evolves, losses may not be fully offset by gains, and the ‘productivity gap’ remains or widens.

5.4 In response, our Mission to create a “**strong, resilient and embedded business base**” seeks to encourage a continued focus on innovation and the growth of capabilities at the ‘leading edge’, balanced with an approach aimed at achieving greater resilience, growth potential and capacity for sustained employment across the region’s wider business base, linked with the decarbonisation imperative in Mission 1.

Growing the innovative edge and accelerating diffusion

5.5 Innovation policy in Wales is at a point of transition, as the European funding that has sustained several major programmes (including the ‘core’ SMART programmes delivered via the Welsh Government⁴⁵ and the wide range of sector or thematic schemes (such as, in South West Wales, ASTUTE and RICE⁴⁶) come to an end; and the range of actors involved in innovation policy (including, potentially, a more active role for UK Government), increases.

5.6 At the same time, there is a consensus, highlighted in a recent review for the Welsh Government, that the role of innovation policy has evolved, to be less narrowly focused on technology, and more embracing of actions focused on addressing social challenges (perhaps especially important given the growth of the health and care sector and the long-term demographic challenges highlighted in Chapter 2) and the impact of climate change⁴⁷. The review also emphasises a need to further develop translational research activities and to link innovation support activity more clearly with the range of finance, advisory, networking and other programmes that contribute to a successful innovation ‘ecosystem’.



Today, innovation is about so much more than science and technology



Future of Innovation Policy report

⁴⁵ SMART Innovation (advice and support to business); SMART Cymru (financial assistance to business); and SMART Expertise (financial support to higher education).

⁴⁶ Reducing Industrial Carbon Emissions (RICE) is led by University of South Wales and Swansea University and works with Welsh supply chain companies to test how CO2 produced from heavy industrial processes can be used to make high value products and industrial chemicals.

⁴⁷ See Kevin Morgan, Dylan Henderson and Rick Delbridge (May 2021), [Scoping the future of innovation policy in Wales](#) (Cardiff University, Centre for Innovation Policy Research)

- 5.7** It will be important that regional activity in South West Wales adds value to and aligns with evolving Welsh national policy (and the wide range of programmes and institutions at UK level). Over the next few years:

Key action areas

- **We will explore a better-integrated regional innovation offer, in the form of a ‘virtual Research and Technology Organisation’ for South West Wales**

The universities are key regional assets and have a strong history of translational research with industry. However, the wider landscape is somewhat fragmented, and may become increasingly so as current programmes come to an end. We aim to achieve a model where there is “no wrong door”, making the most of our university capabilities and enabling them to meet industry need. This could extend across a range of sectors and technologies, linked with (for example) future plans for the development of the research and development offer linked with Pentre Awel at Llanelli, and the close involvement of University of Wales Trinity St David and the development of Yr Egin and its associated creative cluster. It may also embrace wider innovation capabilities, including support in management skills and capacity and (linked with our wider approach to regional skills development) access to talent to enable innovative SMEs to reach their potential.

There may be several options in taking this proposal forward – but the key point is that we maximise the value of our shared assets to deliver a joined-up service across government, higher education and the private sector.

Growing productivity and resilience across the economy

- 5.8** Across the wider business stock, there have been changes in the support landscape since the last Regeneration Strategy was produced. Nationally, Business Wales provides a central gateway to a range of support products, and since 2017, the Development Bank of Wales has consolidated publicly-backed loan and equity support into an ‘arms-length’ and widely-recognised vehicle. In addition, the Welsh Government provides some direct investment (generally in relation to larger, often manufacturing firms), and all the South West Wales local authorities offer support services (in addition to the often university-linked innovation services highlighted above).
- 5.9** A recent review of the Welsh business support landscape highlighted three challenges, which are relevant to the strategy set out in this Plan⁴⁸:
- First, Wales’ **relative vulnerability to economic shocks**: a function of the continuing process of restructuring highlighted in the evidence base. This has contributed to the

⁴⁸ Jack Watkin (February 2021), [A Better Balance: Business support policy for the foundational economy](#) (CREW/ Institute of Welsh Affairs)

more recent policy focus on indigenous business growth. However, while economic ‘shocks’ are often seen through large ‘one-off’ events (plant closures, redundancy programmes, and so on), economy-wide technology-driven transformation is larger in its overall impact, and the ability to adapt and respond will be important across firm sizes and sectors.

- Second, the **scale** of the support offer, and the relatively small number of firms that it reaches (the inference being that there is a much wider range of SMEs that could benefit from interaction with the support system, were the reach to be greater).
- Third, **dissemination of benefits**, in particular the extent to which gains in business performance are captured in wages and tax and in which benefits to the supply chain accrue regionally. The Welsh Government has placed a greater emphasis on this in recent years, through the development of the ‘economic contract’ proposed in the *Economic Action Plan*

5.10 Over the coming years, we want to create a better integrated system across local and national government, within which a strengthened ‘support’ offer is linked with the supply of skills and premises, the role of the public sector as a purchaser and commissioner within the local economy and in ensuring that there is widespread access to fair and sustainable work:

Key action areas

- **We will seek a better co-ordinated support package for business**

The scope of this, and the interaction between delivery at different geographical levels, will need to be explored. But the proposition is that there is a need to drive business density, start-up rates and entrepreneurship, and resilience and ‘adaptability’ to change across the SME base – recognising that ‘enterprise’ embraces a range of organisational types and ownership models⁴⁹.

- **We will link this with public sector purchasing power**

Recently, there has been a focus on the role that public procurement can play in supporting local economic growth. This has been reflected in the Welsh Government’s review of procurement, which has explored the concepts of ‘community wealth-building and the ‘anchor institutions’ in the procurement process⁵⁰, and the South West Wales local authorities are all committed to the proactive and progressive use of procurement. The aim here is to ensure that local SMEs are able to successfully tender for work (linked with the business support offer above), and to use this as a springboard for future growth.

⁴⁹ Including social enterprises, employee-owned businesses, and so on.

⁵⁰ Welsh Government (2020), [Progress towards the development of a new procurement landscape in Wales](#)

Key action areas

- **We will invest in bringing forward access to sites and premises**

The evidence shows that there is a persistent market failure in the delivery of commercial property. This has the effect of blocking the expansion of local SMEs (as well as presenting a barrier to attracting larger investors). Across the local authorities and Welsh Government, we will seek to bring forward development on the region's key strategic sites at Baglan, Port Talbot Waterfront, Fabian Way, Felindre, Cross Hands and the Haven Waterway, as well as within the wide range of smaller sites that will help to support distributed growth across the region, consistent with our wider decarbonisation objectives. We will also work to bring forward new city centre office accommodation in Swansea city centre, building on recent investment and continuing the city's transformation.

- **We will actively promote South West Wales as an investment location**

While the focus of this Mission is on growing our locally-based business stock, inward investment has historically been important in South West Wales, and it remains a key driver of skills and employment and a source of demand for local suppliers. We welcome new investment: we will actively promote the region's assets (linked with its quality of life and visitor economy offer described in Mission 3) and we will work with investors to ensure access to skills and supply chain links, embedding them further in the local economy.

- **We will continue to invest in the region's skills capacity**

Recent years have seen an improvement in the region's skills profile, and we have a strong track record in building an understanding of employer demand and linking it clearly with provision. Alongside the measures within this Plan to increase skills demand and employer engagement, we will continue to invest in strengthening supply at all levels, through specialist infrastructure, investment in access to employment and a continued focus (building on the region's Skills and Talent Programme) on responding to local economic demand and opportunity.

- **Across all our actions, we will improve access to fair and secure employment**

Despite the region's success in creating jobs, economic inactivity remains higher than in the rest of the UK. While in-work poverty is a significant issue - and one which our focus on productivity and resilience across all sectors seeks to tackle - there is strong evidence that being in work supports positive outcomes across a range of measures⁵¹. Building on our experience of successful programmes such as Workways+, we will ensure a range of support to enable people to enter and progress in the labour market.

⁵¹ Welsh Government (2019), [Employability Plan](#), p,9

6. Mission 3: Growing and sustaining the South West Wales ‘experience’ offer

South West Wales enjoys a superb environment and a unique ‘quality of life’ offer. This is a key asset for the region, and one which we must protect and enhance. We will make South West Wales known for the quality and breadth of its ‘experience offer’, bringing together urban and rural environmental quality, ‘quality of life’ and culture. This will support a high-value visitor economy – but it will also be locally owned and a central part of our investment proposition.

Figure 6-1: Summary of assets, opportunities, challenges and actions



Understanding the case for the Mission: the core rationale

- 6.1** South West Wales’ ‘experience offer’ is a key strength. It is also multifaceted and interlinked: while it includes the region’s substantial visitor economy, it recognises that the visitor economy is itself dependent on the quality of the region’s cultural and environmental offer. At a national level, this is reflected with the statement of ‘Wales’ core offer’ within the Welsh Government’s *Priorities for the Visitor economy* (set out in Figure 6-2). This highlights the importance of ‘sense of place’ within the Welsh offer, with the visitor economy helping to act as a showcase for local food and drink and celebrating the Welsh language as a central part of local and national identity⁵².
- 6.2** In South West Wales, the range of experiences the region has to offer is diverse and impressive. It is this diversity that provides much of the region’s distinctiveness: the proximity of the university city of Swansea to the beaches of the Gower for instance, or the region’s range of landscape types (including the Pembrokeshire Coast and Brecon Beacons National Parks) and network of smaller rural towns. This also makes the region attractive as a place to live, and ought to be a central part of the region’s investment proposition. This

⁵² Welsh Government (January 2020), *Welcome to Wales: Priorities for the visitor economy, 2020-25*, p.9.

Mission focuses on **investment** in the ‘experience economy’ and how we can **promote** it to new and diverse audiences.

Figure 6-2: The Welsh ‘core offer’ to visitors



Source: Welsh Government (2020), *Welcome to Wales: Priorities for the visitor economy, 2020-25*

Investing in our experience economy

- 6.3** The ‘good news’ is that several visitor economy trends coincide with some of South West Wales’ inherent strengths: in particular, the increased interest in sustainability, green tourism and nature and a desire for ‘authentic’ experiences. These, and the inherent value of local communities and identity, form part of the wellbeing ‘offer’ to residents as well. However, with the exception of Swansea, all parts of the region are forecast to see falling working age populations over the next twenty years. New employment opportunities should help to reverse this – but there is also an opportunity through the acceleration of remote working and increasing flexibility to retain more of our young people and university graduates, and to attract a wider demographic to the region.
- 6.4** Over the next decade, this will mean investment focused both on the quality of the visitor offer and the appeal of South West Wales as a place to live and work – recognising that these are inherently interconnected:

Key action areas

- **We will invest in the region’s ‘experience infrastructure’**

We will seek to broaden the range of attractions and opportunities across the region, especially where they contribute to an increasingly sustainable offer, linked with the region’s heritage (including in relation to local food and drink produce), culture and natural environment. This will include ensuring that the delivery of key national

Key action areas

initiatives (such as the proposed National Forest) contribute to our wider economic ambitions.

- **We will invest in our city, town and community centres**

Our towns and cities are the gateways to our region, and the focal points for community, commercial and civic life. Much investment has taken place and much is underway – with (for example) the Swansea Arena and its bridge link to the city centre opening in 2021, creating a further milestone in the city’s regeneration. However, there is more to do: across the region, many of our town and community centres have been impacted by structural change in the retail sector – with the process of repurposing requiring complex action on a number of fronts.

Building on our experience of working together across the region, and in the spirit of the Welsh Government’s Transforming Towns initiative, we will prioritise further investment in our town and city centres, ensuring that they are sustainable focal points for the long term.

- **We will make the ‘experience economy’ work for everyone**

Not all parts of the region benefit from the excellent quality of life that the region has to offer – and in some places, our ability to retain and attract younger people is impacted by deteriorating housing affordability (an issue which has the potential to worsen further in an economy increasingly characterised by remote working). Linked with our decarbonisation and net zero objectives, we will continue to invest in affordable housing solutions and long-term community renewal.

Promoting the region

- 6.5** The quality of South West Wales’ assets present an opportunity to better promote the region – to visitors and investors and to raise the region’s profile on the wider stage. This should extend to encompass the renewable energy potential and industrial opportunities highlighted earlier: the region’s future in a greener economy (and the opportunities that presents) combining with its cultural and environmental quality:

Key action areas

- **We will take a more coordinated approach to promoting the South West Wales opportunity**

Recognising that each part of the region has a distinct identity and ‘brand’, we will work to ensure coordination across the visitor, education, local produce and investor

Key action areas

marketing channels to ensure that South West Wales has a clearer 'external' profile and a complementary offer.

- **We will invest in quality**

Welcome to Wales, the Welsh Government's strategy for the visitor economy, places a strong emphasis on *quality* of the whole experience offer – accommodation, food and drink, the public realm, environment, and so on – as the route to a higher-value, more sustainable economic base. Across all of the actions above, we will invest – with business – in quality and excellence.

7. Moving forward: Delivering the Plan

This Plan provides a framework for taking forward the priorities that we have identified in our Ambitions and Missions over the long term. Delivery will depend on a range of investment sources and the coordination over time of specific projects which combine to deliver our objectives. This chapter explains our approach to funding and delivery, and how we will prioritise and monitor our progress.

From a framework to a pipeline of complementary projects...

- 7.1** This Plan takes a long-term view. Recognising that new opportunities will emerge over time, it is intended to be flexible, with specific actions described at a relatively high level.
- 7.2** To convert these into practical interventions, we have prepared a **project pipeline**. This sets out a schedule of interventions, describing how they contribute to our Ambitions and Missions, their current development status and the actions that need to be taken to bring them forward. This will be kept 'live' and will be regularly reviewed by regional partners. This will enable new interventions to come forward where opportunities arise (for example, commercial proposals may lead to propositions that have not yet been identified), and for project information to be updated as schemes progress.
- 7.3** The projects within the pipeline are at different stages of development. Consistent with the approach used by HM Treasury and the Welsh Government (and adopted by the City Deal), projects will be brought forward through the business case process set out in the 'Green Book' appraisal guide. In summary, this means that projects will be considered against the following headings:

Table 7-1: Project business case considerations

Consideration	Description
Strategic fit	<ul style="list-style-type: none"> How strong is the evidence of economic demand or need? Does the project add 'net regional value' (i.e., is it additional to activity already taking place in the region, and if there is any duplication, is this mitigated?) Does the project contribute to the overall strategic framework (i.e., will it support delivery of an economy that is "resilient and sustainable; balanced and inclusive; and enterprising and ambitious"?)
Options appraisal	<ul style="list-style-type: none"> Have a range of options been considered, and is there a clear case for the preferred option?
Value for money	<ul style="list-style-type: none"> Does the project represent good value, in terms of the outputs and outcomes it will achieve, relative to anticipated public costs?

Consideration	Description
Affordability	<ul style="list-style-type: none"> Does funding for the project exist, and/ or is there a clear route to funding? Is the funding model compliant with Subsidy Control and other regulations?
Deliverability	<ul style="list-style-type: none"> Have procurement options been considered and is there a clear route to successful procurement? Are governance and management arrangements in place, and is there sufficient delivery capacity?

Source: SQW

It will be important that the action plan is seen as a dynamic document and that it is regularly updated by partners. In broad terms, projects include:

- Region-wide initiatives to build capacity to take advantage of the opportunities identified in the Plan.** These are highlighted within each Mission, and include:
 - Building capacity and expertise to maximise South West Wales' 'net zero' potential
 - The creation of a 'virtual innovation agency' to coordinate and galvanise links between industry and the knowledge base, especially as European funding comes to an end
 - Support at scale for enterprise and entrepreneurship
 - Public investment in the commercial property offer, to enable investment, business growth and greater environmental sustainability
 - Delivering a coordinated approach to investment marketing and support, linked with the 'experience' economy.
- High profile strategic capital investments**, such as the Swansea Bay and South West Metro

7.4 Major local projects contributing to the overall objectives and Missions. Not all will *directly* benefit all parts of the region. However, in aggregate they will offer substantial regional benefit.

Funding the Plan: A longer-term investment fund

7.5 Funding to take forward the Regional Economic Delivery Plan and its component projects will come from multiple sources, and some individual funding packages are likely to be complex. At the time of writing, there is some uncertainty regarding future funding, as European sources (historically an important part of the funding mix in South West Wales) draw to a close. However, potential sources may include:

- Private investment, especially in bringing forward some of the energy related investments set out in relation to Mission 1, and in respect of major regeneration and development schemes

- The proposed Shared Prosperity Fund (or alternative successors to the European Structural Funds)
- Joint investment across the local authorities, or between the local authorities and the Welsh Government
- UK Government funds (such as the Strength in Places Fund and the Levelling Up Fund).

Key action areas

- **We will seek to secure a devolved regional Investment Fund**

The nature of the funding sources identified above will change over time. However, given the scale of the opportunity (and the regional challenge) in South West Wales, we will seek to secure a devolved **regional investment fund**, which would offer the region the ability to lever in additional funding and bring projects forward on a flexible basis. Such a fund could be structured to give a partial financial return on investment, as well as an economic and social return, depending on the nature of the project. This would require investment expertise and capacity, but could lead to the development of a regional portfolio of projects, derived from the emerging project pipeline and building on the successful implementation of the existing City Deal. Currently, the projects within the pipeline have a total value of around £3 billion over the coming decade: while costs will be determined through the business case process, this provides an indication of the scale of the challenge and opportunity ahead.

Monitoring progress

- 7.6** Our proposed projects are all currently at different stages of development. Through the business case process, we will set out a series of performance indicators against which progress can be monitored. These are likely to include:

Table 7-2: Indicative performance measures

Indicator	Description
Private investment	Additional private investment secured in the region as a result of public support through the REDP
Gross value added	Estimated additional GVA generated as a result of investment
Firm creation and survival	New business starts as a result of REDP-backed activity and survival rates over time
Jobs	Jobs created and safeguarded as a result of investment. The REDP emphasises the quality of jobs (in line with the Economic Contract) and this should be reflected in the performance measure (e.g., employment at or above Real Living Wage and sustained over time).

Indicator	Description
Access to employment	People entering employment (or increasing hours) as a result of intervention
Innovation	Research and development into new products, goods and services as a result of intervention. Adoption of 'new to the firm' products or processes as a result of intervention
Carbon reductions	CO2 savings as a result of investment
Modal shift	Increased journeys on public transport/ increased use of active travel as a result of investment.
Visitor spend	Increased visitor spend as a result of investment

Source: SQW

Governance

- 7.7** The Regional Economic Delivery Plan will be 'owned' and overseen by the **South West Wales Corporate Joint Committee (CJC)**. This will be one of four CJCs established in Wales under new legislation, enabling the constituent local authorities to exercise joint functions relating to strategic planning, transport and measures that will improve the economic wellbeing of their regions.
- 7.8** Supporting the CJC, the Regional Regeneration Directors will keep track of progress and will be responsible for developing business cases, securing investment and ensuring delivery on the CJC's behalf. It will be important to secure sufficient capacity – within individual partner authorities and jointly – to do this, given the scale of the opportunities and challenges. The CJC will also establish mechanisms for a strong non-government voice (e.g., from business and the third sector) in influencing priorities and maintaining oversight.

Annex A: Summary SWOT analysis

A.1 The Evidence and Strategic Landscape Review prepared to inform this Plan contained an analysis of the region's strengths, weaknesses, opportunities and threats. This formed the basis for the analysis within Chapter 2 of the Plan, and is summarised below:

Table A-1: Summary SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Nationally and internationally significant university research assets, with a strong record of industrial collaboration in the region and recent and planned investment in new university facilities • Outstanding natural environment, supporting quality of life and a distinctive location proposition for visitors and investors • Relatively strong record in job generation and in increasing economic activity • Some established sectoral strengths (e.g., engineering and advanced manufacturing; food production) • Some major site development opportunities • Growing and diverse SME base • Community strengths and capacity and strong sense of identity 	<ul style="list-style-type: none"> • Projected decline in working age population and rising dependency ratio • Relatively low productivity, reflected in relatively low wages • Relative peripherality, leading to weak transport and digital connections in some places, and viability constraints on physical developments • Few large firms and company headquarters • Some constraints on firm expansion, linked with workforce skills shortfalls (although qualifications levels are rising) and limited commercial property options • Market change impacting on viability and vitality of town and city centres • Persistent concentrations of disadvantage
Opportunities	Threats
<ul style="list-style-type: none"> • Talent pool generated by the region's universities and further education system; opportunity to retain and grow the skilled workforce and business stock • Opportunities for growth in areas of activity relevant to the region's historic strengths (e.g., advanced manufacturing) and in current research and technology capabilities • Opportunity for location-specific growth in the energy sector and in decarbonisation more broadly • Distance might become less important as remote working becomes 'normal' (potentially increasing the appeal of SW Wales' quality of life offer and helping to change perceptions • Closeness to the natural environment and ability to offer unique sporting, cultural and environmental offer – helping to retain and attract young and talented people 	<ul style="list-style-type: none"> • High carbon intensity of part of the industrial base • Risk of loss of major employers, with potentially significant labour and spatial impacts • Risk of outflow of talent and of younger workers, if there are insufficient opportunities locally • Wider Brexit-related uncertainties relating to export markets, port-related activity and future farm payments • Impacts of the Covid-19 pandemic, including higher unemployment as mitigation measures wind down and accelerate changes in the role of High Street/ town centre functions • Risk that existing inequalities could be exacerbated.

Strengths	Weaknesses
<ul style="list-style-type: none">• Opportunities to build on a track record of collaboration between the public sector, academia and industry• Potentially significant infrastructure investments (e.g., Swansea Bay Metro)• Economic policy innovation in Welsh policy context• Major site opportunities (e.g., Baglan Energy Park) and ambitious plans for investment and development, including as part of Swansea Bay City Deal• Opportunities for business innovation	

Source: SQW

Annex B: Well-being of Future Generations Act assessment

Contribution to the Well-being Goals

- B.1** The Wellbeing of Future Generations (Wales) Act 2015 (WFGA) identifies seven Well-being Goals: a Prosperous Wales; a Resilient Wales; a Healthier Wales; a More Equal Wales; a Wales of Cohesive Communities; a Wales of vibrant culture and thriving Welsh language; and a Globally Responsible Wales. Guidance on the application of the WFGA states that policy should seek to contribute to all seven Well-being Goals, not just the one that most closely approximates to the central purpose of the initiative.
- B.2** The table below summaries how this Plan contributes to the Well-being Goals:

Table B-1: Contribution of the REDP to the Well-being Goals

Goal	Contribution
A Prosperous Wales	Direct contribution The Plan contributes to increasing productivity and economic growth, to support the creation and safeguarding of more, better paid jobs, opportunities for business starts and growth, and further links between the knowledge base and industry.
A Resilient Wales	Direct contribution The Plan places an increased emphasis on economic sustainability through focus on the need to decarbonise the economy; resilience to future technology change through emphasis on responding to and harnessing digitalisation
A Healthier Wales	Indirect contribution The Plan is not directly concerned with health matters. However, greater prosperity (especially where more equally distributed) leads to better health outcomes. The Plan also notes the importance of the health and care sector and the opportunity to link it with economic growth.
A More Equal Wales	Direct contribution The Plan recognises the need to build an 'inclusive growth' model into the strategy, via efforts to support skills outcomes, resilience to automation, or mechanisms to support greater wealth retention within the community
A Wales of Cohesive Communities	Indirect contribution Better economic inclusion outcomes should improve cohesion, where linked with programmes and mechanisms that focus on local community involvement and engagement.
A Wales of Vibrant Culture and Thriving Welsh Language	Indirect contribution Measures to support the growth of the creative economy (including associated with the Welsh language) should directly support, and could be an important part of the SW Wales investment proposition. More

Goal	Contribution
	broadly, the Plan seeks to support the economic vibrancy of the region, including principally Welsh-speaking communities.
A Globally Responsible Wales	Indirect contribution Achieving over time a decarbonised growth model will contribute to this The Plan also highlights openness to new ideas (and investment) from elsewhere

Delivering against the National Well-being Indicators

B.3 The Welsh Government has adopted 46 **National Indicators**, against which progress against the goals of the Well-being of Future Generations Act can be measured. As set out in the core of the REDP, while increasing productivity (gross value added per filled job, or hour worked) is an important measure, success will be measured against a number of other indicators as well. The key relevant indicators are listed below (with the number against each one corresponding to the indicator number published in the Welsh Government list), along with a description of how the Ambitions and Missions in the Plan are likely to contribute to their achievement:

Table B-2: Assessment of contribution to meeting the National Well-being Indicators

Indicator	Route to impact: Enabled through...
04. Levels of nitrogen dioxide pollution in the air	Large scale decarbonisation (Mission 1)
08. Percentage with adults with qualifications at different levels of the National Qualifications Framework	Measures to raise the supply of workforce skills, and improved engagement with employers, over time (across all Missions) Measures to raise demand for skills (across all Missions, but especially relevant to Missions 2 and 1)
09. Gross value added per hour worked relative to UK average	All Missions. This is a measure of productivity, which the Plan overall seeks to address. Note however that 'success' in achieving a relative measure in respect of the rest of the UK depends on the pace of growth elsewhere in the UK (hence the challenges in 'closing the gap' without very large-scale investment)
10. Gross disposable household income per head	All Missions. Note however that this data is not available at the South West Wales geography (it is published at ITL 1 and 2)
11. Percentage of businesses which are innovation active	Measures to increase interaction between business and the knowledge base, and to strengthen the innovation ecosystem (principally Mission 2)
12. Capacity (MW) of renewable energy equipment installed	Developing our renewable energy potential (Mission 1)
16. Percentage of people in employment who are on permanent	Measures to increase economic activity and the supply of higher paid employment. Delivered across all Missions.

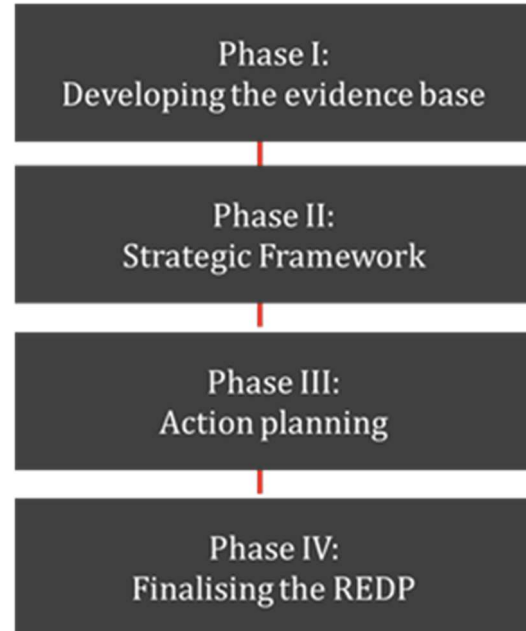
Indicator	Route to impact: Enabled through...
contracts (or on temporary contracts and not seeking permanent employment) and who earn more than 2/3 of the UK median wage)	
18. Percentage of people living in households in income poverty relative to the UK median	Measures to increase access to employment, especially at higher rates of pay. Across all Missions
21. Percentage of people in employment	Key measure of economic success; relevant to all Missions
22. Percentage of people in education, employment or training measured for different age groups	Measures to improve access to, and demand for, education and training (across all Measures)
26. Percentage of people satisfied with their area as a place to live	Consequential measure arising from the success of measures to improve 'quality of place' (especially relevant to Measure 3)
33. Percentage of properties with adequate energy performance.	Measures to achieve a 'net zero' economy and to improve the energy efficiency of the housing stock as part of that (Mission 1)
42. Emissions of greenhouse gases within Wales	Measures to support decarbonisation (Measure 1)

Annex C: Developing the Plan: The process

C.1 The Regional Economic Delivery Plan was developed in 2021 with the support of SQW, through a sequential process that worked from a fresh analysis of the economic evidence to identify the key opportunities and challenges facing the region, and based on that, the Ambitions and Missions reflected in the Plan:

- **Phase I** resulted in the development of a detailed **Evidence and Strategic Landscape Review**. This provides an overview of the region's economy and the policy context, informing an overall SWOT analysis. The Evidence and Strategic Landscape Review has been produced as a separate supporting document and informed the analysis in Chapter 2 of this Plan.
- Based on the outcomes of Phase I, **Phase II** involved the preparation of a '**strategic framework**' for the Plan, which identified the set of Ambitions and Missions that we have set out. As part of this, we analysed the outcomes of the SWOT analysis to consider the region's distinctive challenges, and we developed a series of future scenarios.
- In **Phase III**, we developed an initial pipeline of projects to meet the goals of the Ambitions and Missions. This involved a 'call for proposals' with the South West Wales local authorities and other stakeholders, and the development of a **Project Pipeline Supplement**, which will be kept 'live', as set out in Chapter 7.
- Based on the outcomes of the preceding phases, **Phase IV** involved the finalisation of the Plan, which was produced in draft in August 2021.

Figure C-1: Developing the Plan: Phases



Consultation and engagement

C.2 The development of the Plan was led by the South West Wales local authorities, and regular dialogue took place with a steering group involving the four authorities and the Welsh Government, and with the Regional Directors. The strategic framework and contents of the Plan was also considered by South West Wales Leaders and Chief Executives.

In developing the Plan, consultation took place with over 50 stakeholders from business, local and Welsh national government, leaders within the region's Enterprise Zones and local

business partnerships, and the third sector. This included bilateral consultations throughout the process; discussions at county-level economic partnership boards, the Regional Learning and Skills Partnership, and the Economic Strategy Group of the Swansea Bay City Deal; and a stakeholder consultation workshop which took place in June 2021.

Cabinet 10th January 2022

PRIMARY TOWN CENTRE ECONOMIC RECOVERY PLANS – AMMANFORD, CARMARTHEN & LLANELLI

Purpose: The purpose of this report is to present and seek endorsement of the Recovery Plans for Ammanford, Carmarthen and Llanelli Town Centres and proposed delivery plan

Recommendations / key decisions required:

To note and endorse the economic recovery and delivery plans for Ammanford, Carmarthen and Llanelli.

Reasons:

To ensure that the authority has clear plans and objectives to work with key stakeholders in the town’s respective taskforce/ forum.

To assist respective town centre recovery from the covid pandemic as swiftly as possible.

Relevant scrutiny committee to be consulted YES Community and Regeneration
Scrutiny Committee 30th September 2021

Cabinet Decision Required YES
Council Decision Required NO

CABINET MEMBER PORTFOLIO HOLDER:-
Cllr. Emlyn Dole – Leader Portfolio

Directorate: Name of Head of Service: Jason Jones Report Author: Luke Milward	Designations: Designation: Head of Regeneration Designation: Economic Development Coordinator	Email addresses: JaJones@carmarthenshire.gov.uk LMilward@carmarthenshire.gov.uk
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EXECUTIVE SUMMARY

Date: 10th January 2022

Subject: Primary Town Centre Economic Recovery Plans – Ammanford, Carmarthen & Llanelli

The Town Centre Recovery Plans have been considered at what was previously Executive Board. Executive Board Members were fully supportive of the Town Centre Recovery Plans, subject to feedback from Community and Regeneration Scrutiny Committee on 30th September 2021, and the Online Consultation that took place between 15th October 2021 – 10th December 2021. For the purposes of this report, parts 1 and 2 remain the same, and additional information is contained within part 3 and 4.

1. BRIEF SUMMARY OF PURPOSE OF REPORT.

In support of the Carmarthenshire Economic Recovery and Delivery plan (April 2021) which was approved by Executive Board on the 21st June 2021, the County Council has commissioned work to develop covid recovery plans for each of the respective primary towns within the county.

Working closely with the Ammanford Task Force, the Carmarthen Town Centre Forum and Llanelli Task Force, all of which comprise membership of key town stakeholders, together with representation from key internal departments of the county council, the attached draft plans have been developed. There are 3 individual plans which are bespoke to each town, which set out the impact that Covid 19 has had on the town centres. Each of the plans highlight key issues/opportunities and provide a delivery framework of interventions specific for the individual town centres.

It is envisaged moving forward these plans will be owned and delivered by the stakeholders in the town's respective Task Forces / Forum. We will work with potential funders in Welsh Government and Westminster to lever funding when opportunities arise, and utilise corporate funding identified in the capital programme to enable these plans to be implemented.

2. OTHER OPTIONS AVAILABLE AND THEIR PROS AND CONS

Do nothing – It is likely that without a clear plan for each of the primary towns, recovery from covid 19 will take much longer. Stakeholders would likely work in isolation and the impact of each organisation's activity would therefore be limited, with added value opportunities not being maximised and a risk of duplication.

3. CONSULTATION REPRESENTATION RESPONSES

We utilised an online platform, which offered the ability to review the Town Centre Recovery Plans in their entirety, along with an interactive map where comments could be annotated on specific locations across the towns with an opportunity for individuals to include comments on a separate feedback form.

The online consultation platform was launched on 15th October 2021 and closed on 10th December 2021. The online platform recorded a high number of visitors to the website, statistics were Ammanford – 772 visits, Carmarthen – 997 visits and Llanelli – 786 visits. In addition, 3 virtual town specific consultation meetings were also held, bespoke for each town.

Whilst there was good initial interest in the consultation meetings, identified by the number of visits to the specific online booking form, unfortunately attendance at the meetings was more disappointing. For example, Ammanford – 147 visits to the booking form but only 13 places booked, Carmarthen – 99 visits to the booking form but only 17 places booked and Llanelli – 77 visits to the booking form but only 6 places booked.

Llanelli's event was held on 1st December 2021, feedback received regarding the plans was positive and attendees were comfortable with the proposals. Discussions involved improvements to the indoor market, which was seen as a real asset and key to the town centres' recovery, and opportunities to develop the offer including the outdoor market should be exploited.

Carmarthen's held on 2nd December 2021, positive feedback received during the event with no adverse comments, nor suggestions for amendments to the plan, although there was some discussion regarding promoting Carmarthen as a University town and improving some of the aesthetics within the town centre.

Ammanford's was held on 8th December 2021, no amendments were suggested during the meeting and positive comments were received regarding the plan. Additional suggestions for improvement included Ammanford park, and longer term growth (outside the scope of this report).

Each meeting comprised a mix of Council Officers and various members of the communities who had different interests in the proposals. Feedback received was mostly positive and welcomed given the current climate, and the impact that COVID has had on our main town centres.

In conclusion, with the exception of some additional suggestions for improving town centres, the Recovery Plans were accepted as having a good reflection on the current situation within the respective areas and a positive future delivery plan for their recovery.

4. Recommendation

On the basis of feedback received, with no amendments proposed for the specific recovery plans, it is recommended that Cabinet approve the Town Centre Recovery Plans.

DETAILED REPORT ATTACHED?

YES – Economic Recovery Plan reports for Ammanford, Carmarthen and Llanelli.

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Jason Jones

Head of Regeneration

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	YES	YES	YES	NONE	YES	YES

Policy, Crime & Disorder and Equalities

These proposals support the Carmarthenshire Economic Recovery and Delivery Plan (April 2021). In developing the plan we have fully taken account of the Well-being of Future Generations (Wales) Act by ensuring the actions we have identified fully consider and embed sustainable development with a view to improving economic, social, environmental and cultural well-being in all that we do. The plans also support the Council's Well-being objectives, by creating more jobs and increasing growth of business throughout the County and also improving our town centre environments for a more attractive and better visitor experience.

Legal

Support will be required from the legal department in terms of grant support and property acquisitions. The legal team will be engaged with during the acquisition process as necessary.

Finance

On the 3rd March 2021 Carmarthenshire County Council's Full Council approved the five-year Capital Programme which included funding for the recovery of the County in response to the Covid-19 pandemic. In addition, proposals have been submitted seeking additional funding support from UK Government through the Levelling Up and Community Renewal Funds.

We have also submitted funding requests to Welsh Government through the Transforming Towns programme.

ICT

We will require advice and support in the installation and roll out of Lorawan, 4G and 5G technologies as well as input on skills training proposals identified in the recovery plans.

Staffing Implications

There will be additional implications on current members of staff within the Economic Development team, however there will also be a requirement for nominated members of staff within other departments with varying expertise to assist with the delivery of some interventions.

Physical Assets

Projects may arise which utilise some of the existing property assets we hold. Acquisition of additional units and erection of new builds for regeneration schemes will add to current portfolio and colleagues within the property and insurance teams will be engaged with during the processes. Where appropriate, further reports will be submitted in accordance with the Council's Acquisition and Disposal of Property Policy.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Jason Jones

Head of Regeneration

1. Scrutiny Committee

This was considered by Community and Regeneration Scrutiny Committee at its 30th September 2021 meeting.

2. Local Member(s)

Local Members within town centre wards have been involved within workshop meetings and have been consulted within Ammanford Task Force, Carmarthen Town Forum and Llanelli Task Force meetings. All members have been very pleased with reports and will be key in developing the proposals. Members were also invited to take part in the Online Consultation events.

3. Community / Town Council

Town Councils have been engaged with during the workshop meetings, and have also been key in various consultations, including within Ammanford Task Force, Carmarthen Town Forum and Llanelli Task Force meetings. Town Councils have been pleased with the outcome of reports and will be key in the implementation of these proposals. Community and Town Councils were informed of the Consultation events.

4. Relevant Partners

Key Town Centre Stakeholders such as businesses, Business Improvement Districts, Welsh Government, Dyfed Powys Police, Chambers of Trade, Community Groups and individuals that represent other organisations have been involved in the workshop meetings and development of these proposals. Key representatives from within County Council departments have also been consulted with during the development of the Recovery Plans for Ammanford, Carmarthen and Llanelli Town Centres.

5. Staff Side Representatives and other Organisations

n/a

**EXECUTIVE BOARD PORTFOLIO
HOLDER(S) AWARE/CONSULTED
YES**

**Include any observations here
Fully supportive and involved with Online
Consultation Events**

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

THESE ARE DETAILED BELOW

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Economic Recovery Plan - Ammanford	N/A	Online share file system
Economic Recovery Plan – Carmarthen	N/A	Online share file system
Economic Recovery Plan - Llanelli	N/A	Online share file system

Ammanford Town Centre

Recovery Masterplan

Prepared for
Carmarthenshire County
Council

October 2021



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1 Purpose & Context

This recovery masterplan has been commissioned for Ammanford town centre by Carmarthenshire County Council (Carmarthenshire CC) in response to the effects of the COVID-19 pandemic. The masterplan reviews existing regeneration activity and provides a fresh focus on the priorities and the strategy for recovery and future growth.

At the current time, the long term effects of the COVID-19 crisis are highly uncertain which makes it difficult to draw a clear picture of the future. As we manage and adjust to the pandemic moving forward, there is the need to rethink the shape and purpose of the town centre and how to positively respond to longer term changes.

This recovery masterplan has been prepared with the contributions of local businesses and stakeholders to help steer the immediate actions in support of town centre recovery and to provide the framework to help re-imagine longer term regeneration and growth. Furthermore, at a time when Carmarthenshire as a whole is suffering from the effects of the pandemic, the recovery masterplan aligns with the priorities and actions that will support the Carmarthenshire wide economic recovery¹.

¹Carmarthenshire Economic Recovery and Delivery Plan, Carmarthenshire Council 2021

Ammanford town centre profile

- A multifunctional town centre with a strong local convenience and community role
- Business and activity are concentrated around College Street, Quay Street and the edge of the town centre along Foundry Road
- The centre comprises of mainly independent businesses with strong interpersonal relationships and loyalty with their local customers
- Edge of centre Tesco and Lidl anchor the town's convenience shopping together with the town centre Co-op
- The Friday street market is the town's busiest day
- Competition for the town centre derives mostly from regional scale shopping located at Llanelli Parc Trostre, Swansea and Carmarthen
- Recent regeneration programmes have focussed on physical projects, buildings for commercial use and job creation funded through the Ammanford Regeneration Development Fund and Targeted Regeneration Fund (TRI)
- Local wards are some of the most deprived in Carmarthenshire and Wales which is reflected in the levels of prosperity and the characteristics and challenges facing the town centre as a whole

2 The Impact of COVID-19

The impacts of COVID-19 are huge, unprecedented and continue to cloud the economic outlook. The effects on the town centre have been driven by several inter-related shocks including forced closures, social distancing, accelerated online shopping and structural changes for national multiple retailers.

Whilst impacts have been largely negative, some positive changes have also arisen including strengthened community networks, support for local businesses and 'shop local'. It has also supported growth in business innovation, diversification and created new business opportunities.

The Economic Impact Assessment of COVID-19 on Ammanford town centre² identified the immediate and some potentially longer term impacts that shape this masterplan.

² Ammanford Town Centre – Economic Impact Assessment of COVID-19, December 2020, Owen Davies Consulting Ltd



- £472k – the estimated amount of weekly spending on non-essential retail, services, leisure and hospitality that has been lost during periods of lockdown.
- A 70% decline in footfall at its lowest level in April 2020 compared to a year earlier. By September 2020, footfall remained 24% lower year on year. However, footfall levels have recovered at a higher rate compared with the other Primary Towns in the county. Footfall is highest on Friday market days.
- **18% - the vacancy rate reflecting the loss of national multiples and independents in the last 12 months.** Future closure of New Look is expected in 2021.
- Impacts on the wider Ammanford economy have been modelled and show reduced productivity, loss of employment with accommodation and food services businesses expected to **experience significant closures.** Prosperity measured in terms of average household income is lower than average.

Future drivers of change

Post COVID-19 life will likely be different to what many were used to with the pandemic accelerating many pre-existing structural trends as well as people forming new habits. This means people are unlikely to return entirely to the old behaviours. However, there remains uncertainty with how permanent these changes will prove once COVID-19 is no longer a threat and people can return to normal work patterns and socialising. The future drivers of change (Figure 1) are likely to have both positives and negatives effects for businesses and the people that use the town centre.

	Negatives	Positives
National multiple retailers	Loss of footfall as brands that once provided an important customer draw continue to restructure/close	Prime frontage become available for ambitious independents
Office space	New pattern of working from home reduces number and frequency of office workers commuting to the town	Working from home and reduced out-commuting increase opportunity for more localised spending and activity
	Demand for office spaces decline	Opportunity for combined agile office hubs and shared workspace
Online shopping	Continued growth of online shopping results in long term loss of footfall	Brick & mortar businesses grow trade online to reach new markets & customers
	Retail – require smaller sales areas and different type of space to allow increased storage and back office	Business offering quality, specialist and experience led retail and personal services likely to grow
Property	Decline in demand for retail and office space results in decline in property value/income for owners/investors	Lower 'attractive' rents and more flexible terms encourages independent business start-ups and existing business growth
	Declining viability and willingness to adapt property and invest	Landlords/property owners are incentivised to work in partnership with public sector and play an active role in regeneration
Place & attractiveness	Cautious consumers and ongoing health concerns attracts customers to locations considered safer e.g. retail parks	Opportunity to re-shape public spaces and improve pedestrian environments
	Loss of retail character and dominance of shopping	Space for new and intensified uses – residential, leisure, health, culture. Growth of new customers – e.g., homeworker meetings/ lunchtime hospitality
	Loss of hospitality, culture, leisure businesses that offer 'experiences' but have also been hardest hit	Greater emphasis on experience & 'place'

Figure 1: Drivers of change

3 Key Issues & Opportunities for the Town Centre

People

Understanding the characteristics of the people who live nearby and potentially work, visit and use the town centre is an underpinning element of the masterplan. Once social distancing restrictions are lifted, it will become clearer how people’s behaviour and preferences have been altered, and this will determine how businesses, leisure and cultural attractions adapt as a result. It will be important for the masterplan to safeguard the businesses and activities that current customers want as well as attracting new users by understanding who they are and what they desire.

Community Profile

Approximately 14% of comparison (non-food) expenditure made by residents living in Ammanford is currently spent in the town centre with circa one third (£58m) leaking to nearby locations including Parc Trostre, Fforest Fach Retail Park, Carmarthen and Cross Hands. Local working patterns are anticipated to account for expenditure away from the town centre.

Whilst the majority of weekly spend is on convenience (food and essentials), expenditure on clothing/footwear, and eating & drinking is also important (Figure 3). The centre’s local convenience role is clearly important as is the value retail role. In addition, safeguarding the established hospitality sector will be important for the future recovery and growth in the town centre

Category	% Using the centre
Affluent & prosperous	12%
Financially stretched	26%
Comfortable	58%

Figure 2 – Acorn consumer segmentation. Source CACI 2020

Spending

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Commuting

Before COVID-19 some 1,300 people commuted daily out of Ammanford. The main destinations being Swansea, Llanelli, Carmarthen, Cross Hands and Neath. A much smaller numbers of commuters travel to Ammanford from nearby towns and villages, including Glanamman and Llandybie.

Outlook

The emerging local development plan (LDP) identifies Ammanford as playing a localised service centre function rather than being a primary focus for new development. With no major housing development or major economic development plans for the town, it is the investment in local infrastructure that will drive forward the town's regeneration. In Ammanford, this includes the proposals to remodel and modernise the primary school settings in the town with a new facility for children, staff (and parents) in the town centre and investment in leisure facilities.

Carmarthenshire's Modernising Education Programme currently contains a scheme to develop the existing educational provision within the Ammanford area, which will entail a review of the current infrastructure and facilities.

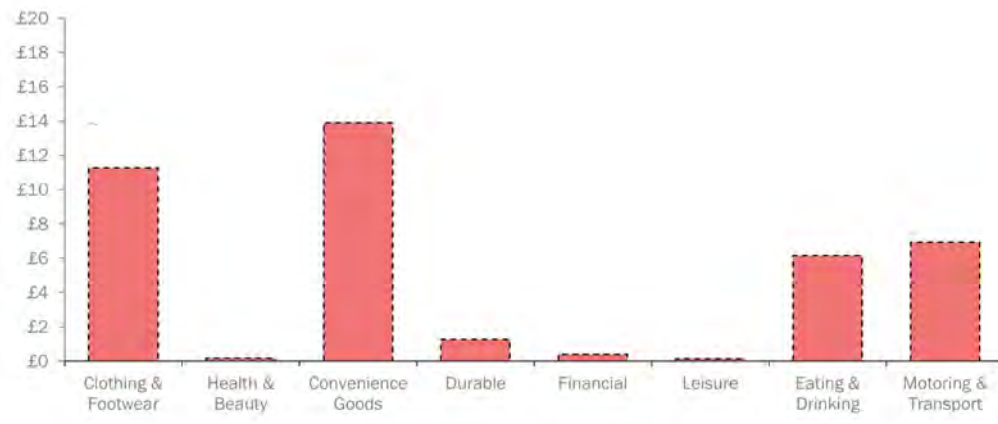


Figure 3: Average weekly household spend
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Carmarthenshire’s Leisure Services have appraised the market and identified the potential to expand the Health and Fitness suite offer in the town. This cannot be accommodated within the current shared school/leisure centre and a separate leisure/school site masterplan is expected to be completed within the next 10-15 years. Consequently, Leisure Services are considering several options including town centre properties suitable for an extension of leisure services.

Business

The key considerations are the need to safeguard viable businesses particularly those in key sectors and that will contribute to a higher quality experience and diversity of uses. The masterplan also needs to support businesses capable of capturing new customers and opening up new markets whether they are new enterprises or established businesses ambitious for growth.

The business footprint demonstrates the number of businesses by type and how Ammanford town centre is dominated by retail across several categories. Whilst it is likely that retail will continue to decline (notably clothing and footwear and durable) as a proportion of the town centre, growth categories providing more personal and experience led services such as health, beauty and eating and drinking will have the potential to grow as part of an evening economy offer. The leisure offer is also an opportunity for growth.

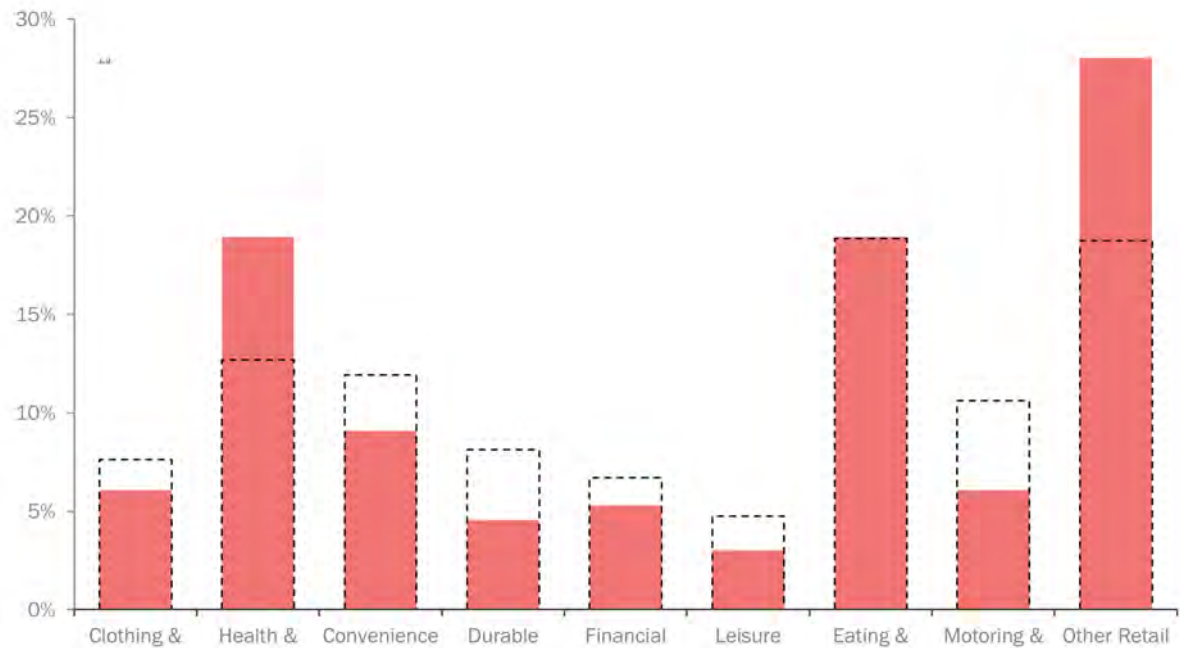


Figure 4: Town centre business footprint
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Diversity & Speciality

It's possible to buy most essentials in the town centre from either the Co-op supermarket or independent businesses. There are independent bakers, butchers, pharmacy, florist and hardware shops. There are also a number of independent specialists including jewellery, cobblers, health and beauty and women's clothing. Furthermore, there is a notable quantity of book shops and antique shops. The evening economy is characterised by a handful of pubs and a large number of takeaway/ fast-food restaurants.

The specialist nature of several businesses may not be immediately apparent to a visitor because they are dispersed across the centre, but they signify a high quality of local business.

Research of the Ammanford areas has also identified a range of specialist 'home based' businesses that have the potential to provide the basis for further growth of the town centre and strengthen the quality independent charm. Businesses include 'maker business' such as Bespoke Wood, Y Gegin Maldod, Piece of Cake Wales, Hometime Crafts, Augustus Gloop Cake. There might be potential to established new cooperatives comparable to Ammanford Arts and Crafts, local artists and crafters located in a communal town centre shop and sharing their talent and costs in Ammanford's first arts co-operative.



Figure 6 Examples of specialist businesses located outside of the town centre

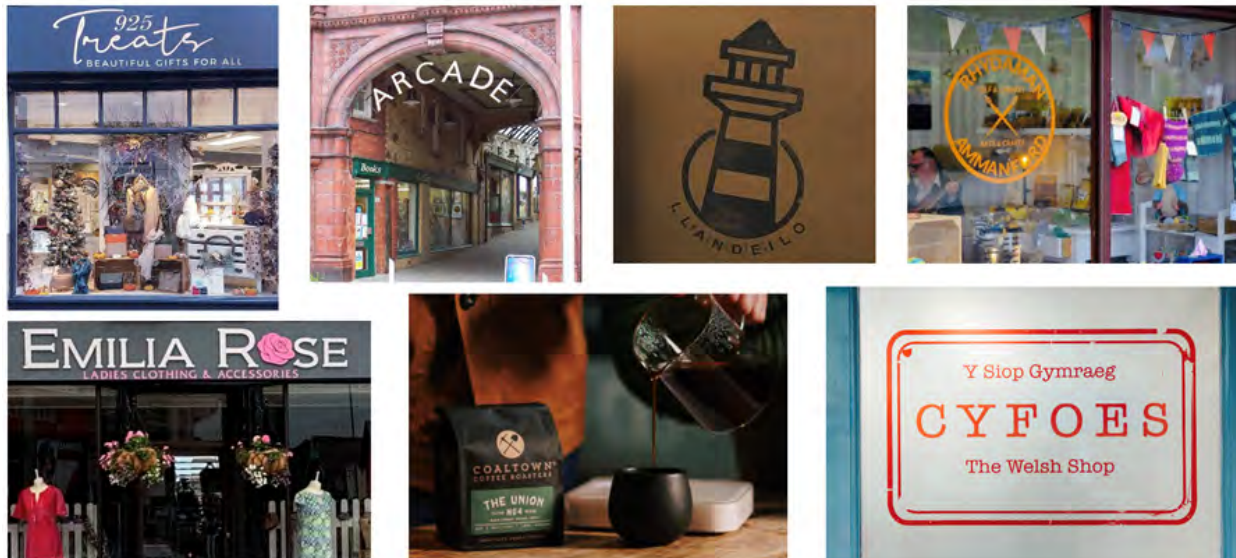


Figure 5: Examples of independent businesses

Business Property

With the decline in retail and larger format stores, there is a need to repurpose and adapt a large amount of town centre property. Vacancy rates have grown in Ammanford and sustaining occupation levels, particularly if the new growth arises from the small business and independent sector, will require fit for purpose and attractive property with greater flexibility with rents and lease terms.

Vacant properties are distributed across the town centre, with a mixture of small and larger units available to let. Since the announcement in February 2021 that Poundstretcher will occupy the former supermarket building off College Street, the larger premises are now concentrated on Quay Street. The likelihood of large businesses closing in 2021 will compound this situation and lead to a concentration of empty frontages.

For some of the largest units, different opportunities in need of greater floorspace could arise including the reposition of the Councils leisure offer to provide centrally located facilities and potential for bringing college education and training closer to the town centres.

However, the dynamics of the property market are complex and require both the demand for units and willing landlords. If adaptation is necessary, a viable return for the owners/investor will be necessary. The potential for growth of the small independent business community and the need for recovery to cultivate closer to home solutions means that

commercial property needs to reflect the changing shape of demand whilst encouraging green shoots and opportunistic businesses willing to invest.

The proposed Local Development Order will be a critical policy tool to promote flexibility that can be enacted relatively quickly. An LDO, if approved in 2021 will provide general planning consent for the ground and upper floors, removing the need for planning applications and streamlines the planning system, lowering barriers to a range of new uses and investment.

Digital and Social Media

Growing small businesses and transitioning to medium and potentially larger-scale operations requires improved productivity and market reach. Growing an effective online customer base will likely be an important part of this future business growth.

Our review of Ammanford's digital health suggests that not enough is being done by most local businesses online to maximise their communication - although the presence of community groups is relatively strong. There are, however, notable leaders such as Coaltown Coffee and RedStar 13 which set a precedent for communication, interaction and subsequent growth.

66% of UK consumers spend 3hr day on social media

52% of UK consumers use social media to research purchases

Only 27% of Ammanford's town centre businesses active on social media

Ammanford online profile is notable mostly for the nearby natural attractions and the sizeable building and manufacturing businesses situated close by, but not necessarily as a destination in its own right. There are some exceptions such as Coal Town Coffee which is a thriving cafe and roastery serving a spirited local community and is a clear county-level leader in its online retail approach.

The online community suggests the night-time economy is healthy thanks to a collection of good takeaways and restaurants and a quirky strong community spirit with Ammanford's Guinness Book of World Records for the Largest Gathering of Santa's Elves

However, with retail in decline in the town (even before the pandemic) and the online presence of the town and its businesses generally weak. This could be strengthened considerably to drive further local and independent business growth, as well as supporting and development of the weekly Friday market, which was once a destination point for people in the surrounding area and visitors alike.

Marketing and communication will also need to focus on the local community and catchments area with opportunities to create a sustainable regular event (e.g local market) which acts as a platform for small and local businesses to showcase their wares. As well as marketed to the local community and grown into a stronger local offering the potential grows to become an attraction for visitors.

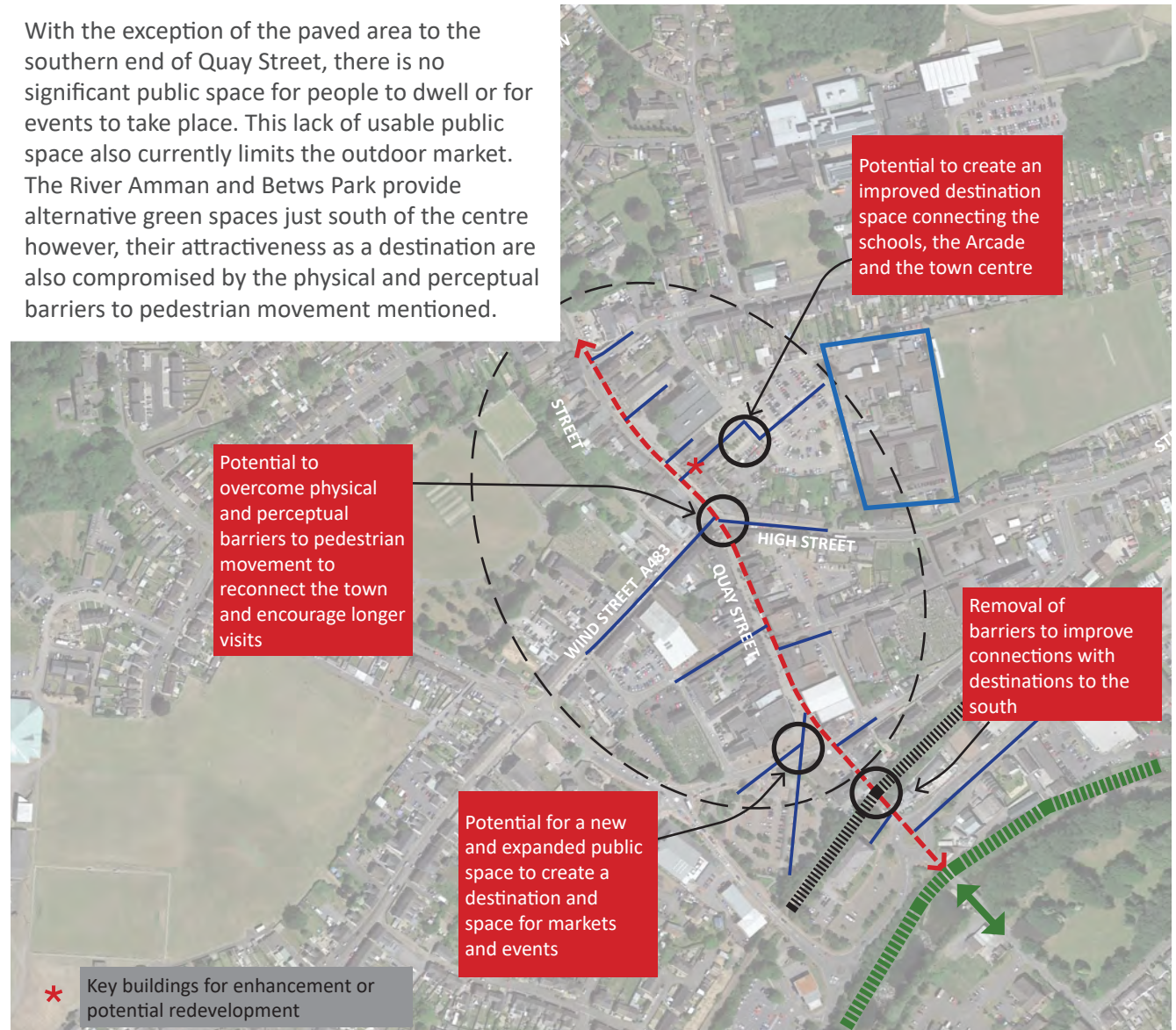
Place

Ammanford's town centre has a linear form focused around the north-south alignment of Quay Street and High Street / College Street. Numerous lateral side streets connect with this route along its length, providing additional retail frontage and access to other facilities. This simple arrangement results in a highly legible town centre however, pedestrian connectivity, is significantly undermined by the east-west Wind Street (A483) High Street route. This route is dominated by traffic and presents a severe physical and perceptual barrier to pedestrian movement.

The compactness of the town centre has also been compromised in recent years by the increase of key destinations to the south of the town centre especially along Foundry Road. The distance of these locations is further compounded by the perception of severance by the railway line south of Quay Street.

Areas either side of the north-south axis behind the retail frontage comprise a mixture of important facilities such as the schools and car parks, together with numerous areas of fragmented and poorly planned urban form. The town also benefits from some notable attractive buildings and non-more impressive than the Arcade which provide an elegant location for high quality independent retail and is an important link between the schools and the town centre.

With the exception of the paved area to the southern end of Quay Street, there is no significant public space for people to dwell or for events to take place. This lack of usable public space also currently limits the outdoor market. The River Amman and Betws Park provide alternative green spaces just south of the centre however, their attractiveness as a destination are also compromised by the physical and perceptual barriers to pedestrian movement mentioned.



Summary of Key Challenges & Opportunities

Challenges

- Decline of retail the national brands that attracted footfall
- Large amount of local spend 'leaking' to Parc Trostre, Swansea, Carmarthen and Cross Hands (partly reflects commuter flows)
- Underlying lower levels of prosperity
- Growth of vacant property including several larger units
- Viability of adapting/reconfiguring commercial property with weakening demand
- Low levels of digital business engagement
- Cautious consumers
- Safeguarding – business 'surviving' the pandemic
- Place management – e.g. communication/marketing & car parking

Opportunities

- Strengthening the local convenience community role
- Working from home/reduced out commuting increases localised spending
- New town centre education & leisure facilities
- New models of shared office workspaces
- Entertainment, hospitality, arts, culture and theatre
- Street markets that are distinctive and vibrant
- Existing base of interesting and specialist independents
- The Arcade, character buildings, riverside area and parks

Summary of Key Objectives

To drive forward the plan for recovery and growth and to provide a focus for the strategy and delivery plan the following objectives for the town centre have been identified:

- Focus on attracting local families and younger people through securing new leisure, education and cultural uses, to help broaden the range of activities and extend 'dwell time' and spend throughout the day and evening
- Ensure plans to redevelop the town centre primary school and the expansion of leisure facilities provides new 'anchors' that drive footfall and directly benefits for the town centre
- Encourage the growth of the weekly market to include a greater number of stalls and new types of markets
- Unify the disjointed areas of the town centre through better-quality highway design, pedestrian links and the redesign and animation of key open spaces
- Safeguard viable businesses, cultivate new local enterprise and support independent businesses to locate and grow in the town centre
- Establish a SMART town with businesses making best use of digital technology to grow their market reach, turnover and footfall
- Using the towns natural 'green & blue' infrastructure to create a stronger sense of place and distinctiveness
- Effectively communicate what the town centre has to offer to the local community and grow local loyalty and new custom
- Initiatives that ensure a range of stakeholders are involved in delivering improvements for the town centre
- Encourage decarbonisation through low carbon and climate-resilient infrastructure, renewable energy and sustainable developments
- Support for the use and promotion of the Welsh language and culture.

4 The Recovery Masterplan

The social and economic impact of the pandemic and Brexit are expected to fall most heavily on places like Ammanford that are relatively more deprived. However, the town centre is likely to feel less directly impacted by the pandemic, because of its localised customer base and a smaller proportion of office workers and retail space to start with. Nevertheless, Ammanford needs to rethink the path for recovery and growth in light of the changes brought about by the pandemic, as small changes will have dramatic impacts such as the closure of national retailers creating large voids in the heart of the town. However, new commercial opportunities could also be created from the reduced level of outward commuting and the increased demand for living in rural towns.

The path towards town centre recovery and growth needs to be flexible in response to this uncertainty, but also it needs to focus on building a stronger, more sustainable and durable local economy based on local business, inspiring local people and strengthening the distinctiveness of the place.

The overall strategy for Ammanford town centre focuses on the town's community scale and purpose. With an emphasis on localism, the masterplan aims to harness closer to home solutions that build a stronger and more resilient town centre at the same time as capturing the positive effects of planned investment in local education and leisure facilities. Rooted in local people using the centre more often, the masterplans approach also seeks to support the

micro and small business community to grow and to upscale, to build the towns profile and positive character through the local brands, local culture and promoting access to the local environment.

The centre also needs to become more walkable and better connected by reducing the separation between the town's principal commercial areas and car parks located at both ends of the town centre. Better linkages are also needed to connect with the services and retail attractions located on the outer edge of the centre beyond the railway line.

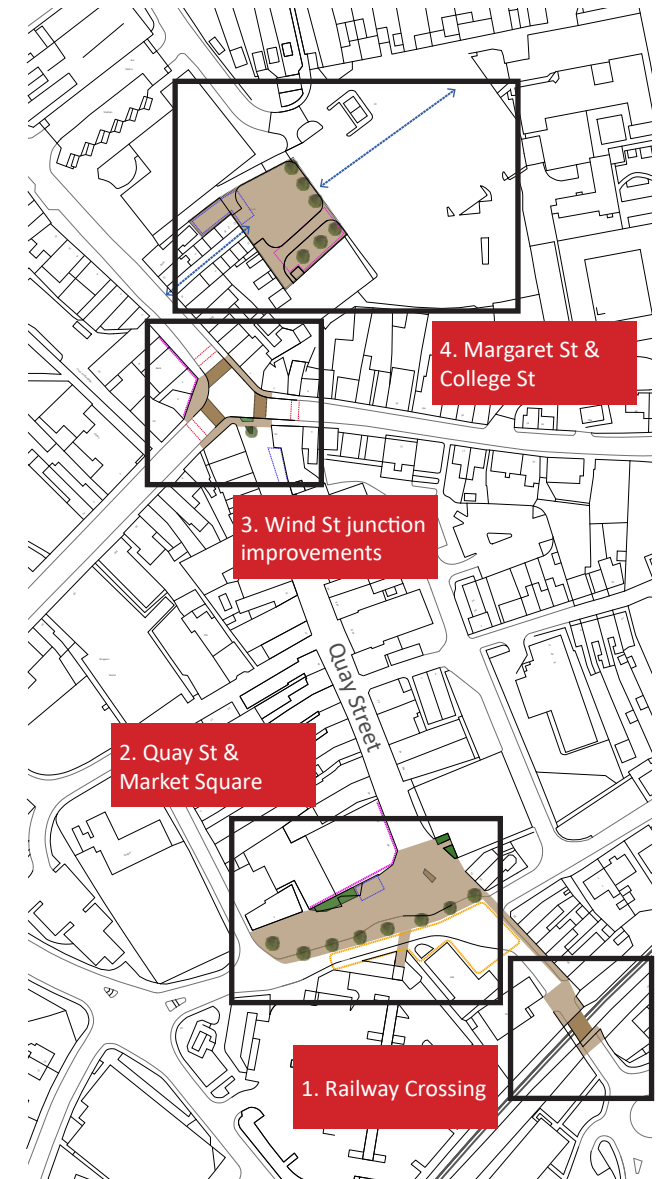
The place-making approach also helps to create more functional and attractive public spaces located at each end of the centre. This will improve connection with the riverside environment, support local businesses, help the weekly market to grow and encourage people to spend more leisure time in the centre.

As retail uses will command less space, especially in Quay Street, the centre will have to become more multi-purpose to replace the national retailers and to safeguard the business that remains and are reliant on footfall.

Spatial Priority Areas

The masterplans spatial priority areas provide a focus for interventions based on both need and opportunity.

These are located on the adjacent plan.



Project 1. Railway Crossing

Objectives

Redesign of and environmental improvements to the existing pedestrian railroad crossing to ensure attractive inviting and safe connection with numerous destinations south of the rail line.

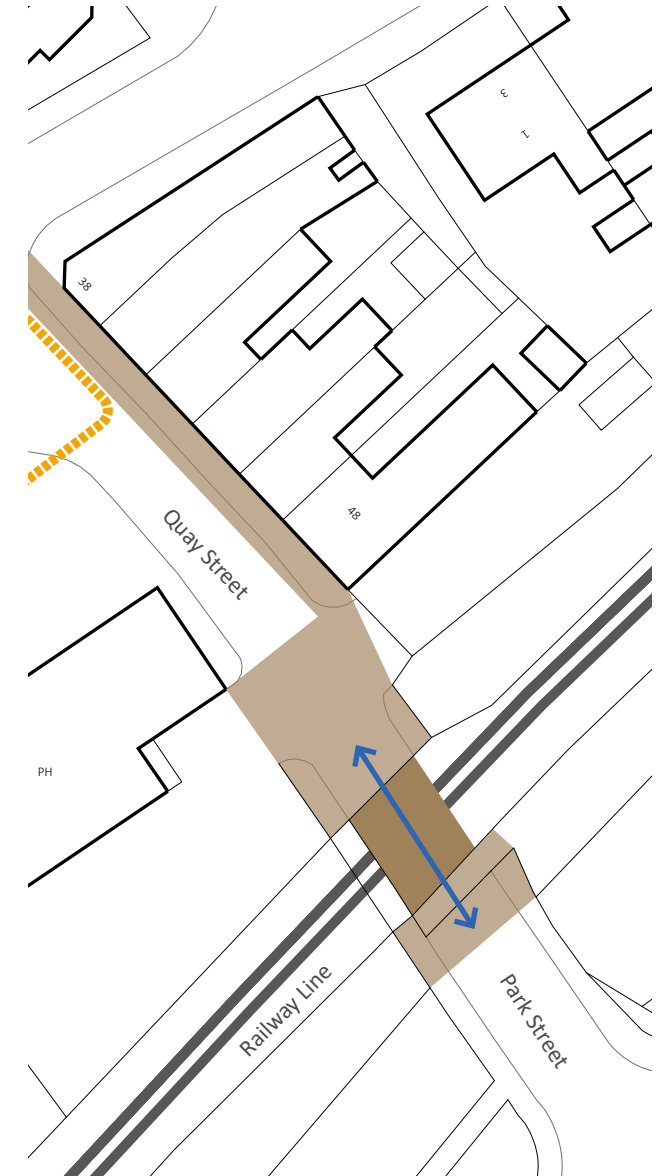
Many important commercial attractions, services and natural features are located along Foundry Road on the edge and outside of the town centre. Improved walking and cycling links between destinations such as Coal Town Coffee, Lidl, the Job Centre Plus offices and other office investment underway will be necessary if the town centre is to function more effectively as a whole. The riverside walk, Betws Park and the national cycle route are important elements of the towns green and blue infrastructure in need of better connections with the centre.

The infrequently used railway line acts as the main barrier to walking and cycling direct routes between these destinations, and the redesign and environmental improvements to the existing pedestrian rail crossing would ensure the link is more attractive, inviting and safe.



Tasks

1. Preparation of a brief for a feasibility study (approximate RIBA Stage 2) to create improved pedestrian crossing of the railway line. Including:
 - Liaison with railway line operators to understand key parameters.
 - Engineering report and concept designs with associated public realm proposals to create a safe accessible and attractive route.
 - 'Access for all' appraisal of options
 - Guidance regarding costs, risks, delivery process and timescale



Project 2. Quay Street & Market Square

Objective

The redesign of the existing public space to create a significantly enhanced 'Market Square'. This re-imagined space should function as a focus for the town's civic activities, informal leisure an improved location for the town's market.

Quay St is the heart of the town centre shopping area and is likely to experience significant changes as a consequence of the decline of national retailers. The risk of large store closure and long term vacant premises, requires positive intervention to safeguard and prevent the street from declining further. The requirement for a new leisure gym and fitness suite is the obvious opportunity with the potential to occupy the scale of property available or if necessary, in a new building in this area.

The southern end of Quay Street is the location of the weekly market, however, space is constrained and hindered by its layout and other features including the road space and pedestrian crossings. The priority is for an improved public space designed to create a significant enhanced 'Market Square'. This reimagined space should function as a focus for the town's civic activities and an area for events and leisure activities.

Tasks

1. Capacity study exercise that identifies options for expansion of the outdoor market including options for temporary use of the road space and use of part of the adjacent car park. The options could be tested on a trial basis to help support the development of permanent proposals for Market Square'.
2. Support the adaptive reuse of the 'Store 21' building and encourage an occupier that will contribute to the active use of the building to enliven Market Square. Consider the potential for increased opening of the blank wall to create active frontage, or the potential for a 'green wall' for visual and environmental benefits. Also explore the viability of a new-build property.
3. Liaise with Home Bargains to consider visual enhancement of their boundary walls and entrance area.
4. Preparation of a brief for a feasibility study (approximate RIBA Stage 2) to explore ideas for the redesign of Market Square. Including:
 - Options for the expansion of the usable public space through the reduction, removal or sharing of the adjacent highway, bus stop, roundabout (Heol Wallasey) and consideration of the wider implications of these approaches on the highway network
 - In conjunction with the above, options for improved and more direct pedestrian access from the south including the adjacent car park and with Quay Street railway crossing.
5. Commission Topographical survey; utilities, basement and radar survey; Liaison with statutory undertakers and assess funding opportunities
 - Coordination with the results of the market expansion capacity study.
 - Review pavement licensing arrangements and extend to encourage more active use.
 - Concepts for the significant redesign of the space in terms of its arrangement and aesthetics, to create an attractive, dynamic and contemporary public space that benefits from trees and planting and provides opportunities for sitting, shelter and informal leisure - as well as unconstrained usable space for market stalls.
 - Furniture / signage audit and proposals for the de-cluttering of the street environment.
 - Lighting proposals to create a more ambient setting for evening activity and power supplies for market stalls.
 - Review of existing TROs and 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting that is coordinated with Quay Street
 - Strategy for stakeholder/ public engagement
 - Cost appraisal / Risk assessment / Delivery timescale



- a** Potential to expand the public space and reduce or share the road space, to create a more attractive and usable destination town square, with opportunities for performance and events.
- b** Potential for occasional use adjacent highway space (or adjacent car park) for a larger scale outdoor market.
- c** Improved direct crossing to connect Quay Street with the car park.



Existing

- d** High quality and contemporary landscape treatment to create a genuine attraction in the town centres and encourages people to dwell and enjoy the space.
- e** Potential to improve the existing building edges through increased visual permeability, active frontages, 'green wall' solutions and seating areas for cafe or street food stalls.



d e

Project 3. Wind St junction improvements

Objective

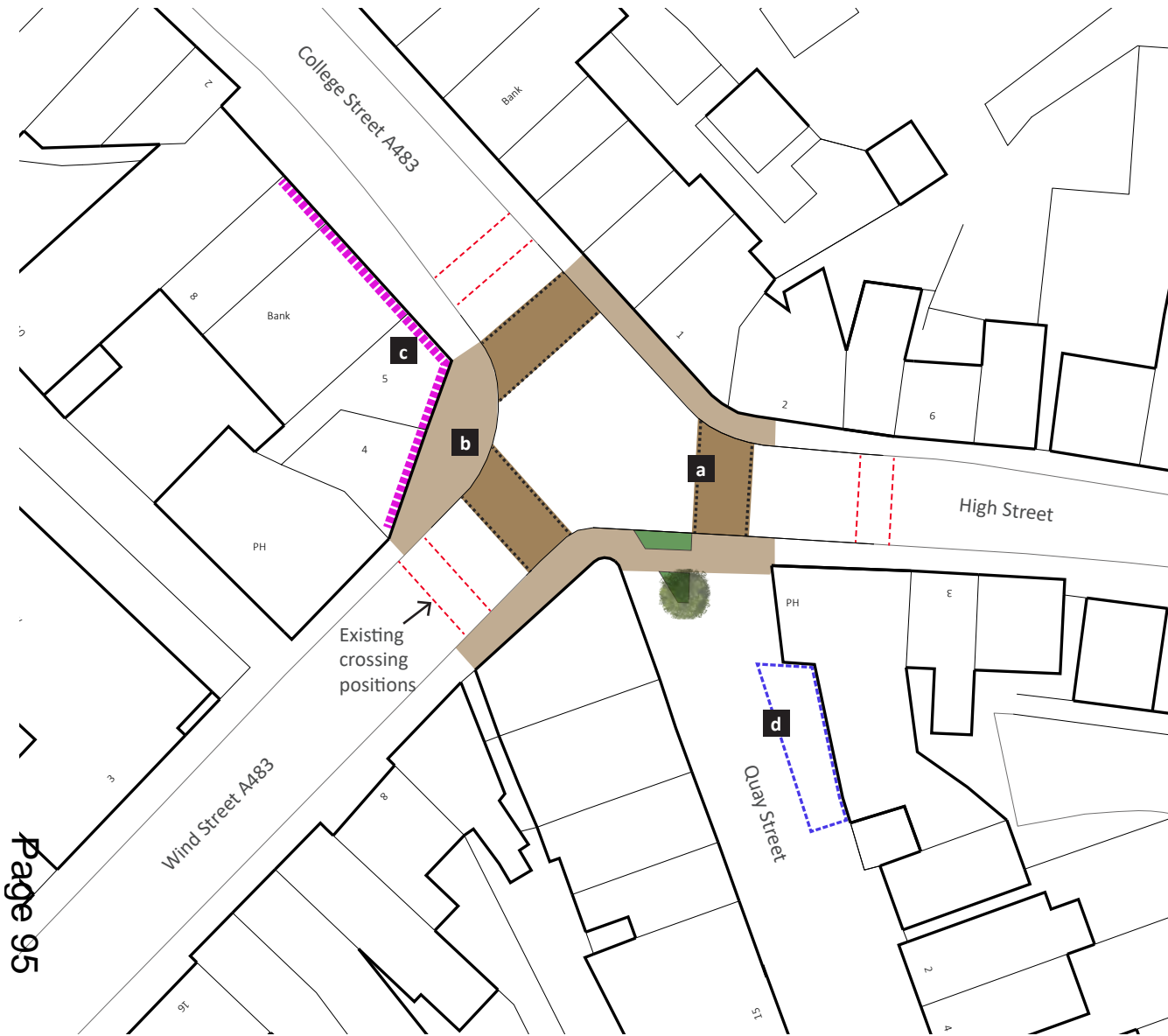
Explore opportunities to redesign the junction to maximise direct, intuitive pedestrian connection and minimise the dominance of highway infrastructure together with coordinated public realm improvements.

The Wind Street junction is a key space that connects the two halves of the town centre between College Street and Quay Street, yet the pedestrian experience is one of the barriers to smooth and convenient movement through the town. There is a need for a technical study to explore opportunities to redesign the junction to maximise direct intuitive pedestrian connections and minimised the dominance of the highway infrastructure.

In this location, the group of modern design building that frames the junction on the Wind Street corner are in poor condition and visually detract from the quality of the town centre and would benefit from improved façades. The redesign of the public realm and improvements to the adjacent spaces especially at the north end of Quay St will provide opportunities for commercial use of the external space including opportunities for the public house.

Tasks

1. Preparation of a brief for a feasibility study (approximate RIBA Stage 3) to create improved pedestrian crossing at the junction of Wind Street. Options should seek to create wide crossings in-line with the pedestrian desire lines connecting Quay Street with High Street to the north. The study should include:
 - Technical highways appraisal of traffic flows, vehicle swept paths, traffic signal timings, and consideration of the wider implications on the highway network.
 - Consideration of the corresponding removal of the pedestrian barriers, kerbs and signage.
 - Liaison with the Highway Authority to understand key parameters and approval process for the exercise.
 - Associated public realm proposals to create a safe environment without the use of pedestrian barriers, and an attractive, welcoming setting at the northern end of Quay Street.
 - Street furniture and signage audit and proposals for the de-cluttering of the street environment.
 - Lighting proposals to create a more ambient setting for evening activity
 - Review of existing TROs
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting that is coordinated with Quay Street
 - Strategy for stakeholder/ public engagement
 - Cost appraisal, risk assessment, delivery timescale
2. In support of the feasibility study, undertake or commission the following:
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in the area
 - Assessment of funding opportunities
3. Promote the use of the outside space on Quay Street adjacent to the public house, for tables and chairs
4. Liaise with building owners especially those front the junction on Wind Street and High Street, to improve the appearance of the building and shop-fronts.



Existing



a

a Existing crossings and highways infrastructure replaced to contemporary pedestrian crossing solution and removal of pedestrian barriers to create a more convenient and attractive connection between north and south.

b Corresponding improvements in the public realm to coordinate with the materials used in Quay Street

c Cosmetic improvement to Key buildings and shop-fronts

d Use of the external spaces for outside dining areas

Project 4. Margaret Street & College Street

Objective

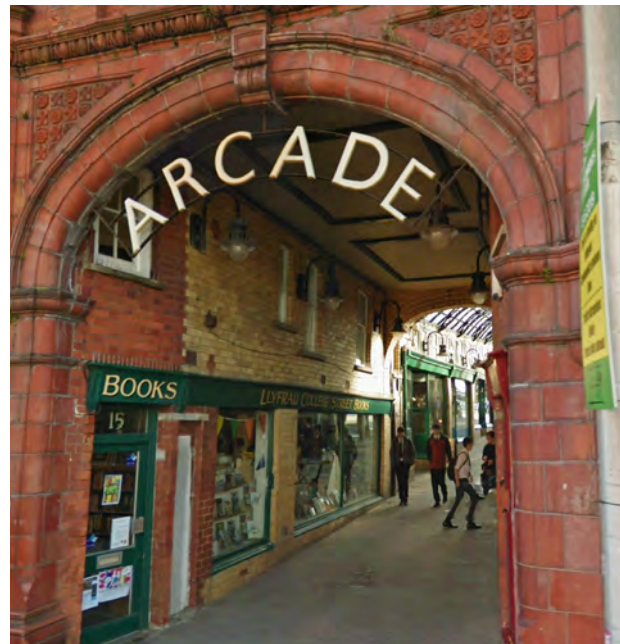
Re-imagining of the existing public space as 'Arcade Square' to create an inclusive facility to encourage families to remain in the area beyond school and use the arcade and wider town centre.

Carmarthenshire's Modernising Education Programme contains a Band B scheme for the development of educational provision within the Ammanford area. Whilst the scheme is currently in development it is hoped to provide medium to longer-term investment in community-focused education with potentially significant benefits for the town centre. This would be achieved through developing and providing fit for purpose, 21st century facilities which are appropriately located to support improving buildings, infrastructure and adjoining spaces that foster links with the town centre. Throughout the progression of the scheme, careful consideration will be given to ensure that any development supports and complements the town centre masterplan objectives.

In the immediate and shorter-term there are opportunities to address public spaces to connect the school to the town centre. 'Arcade square' is the existing public space positioned next to the car park and reimagined to create an inclusive facility to encourage families to remain in the area beyond school and use the arcade and wider town centre.

There is the possibility of installing imaginative play facilities and opportunities for table and chairs etc. that would support the hospitality businesses located in the Arcade.

The former Co-op building will be re-occupied by Poundstretcher, possibly on a soft short term lease. Longer-term, the building remains an option for the redevelopment and potentially expansion of larger-scale activities and uses including leisure facilities. There are several smaller vacant premises concentrated along College Street that would benefit from investment, potentially mixed uses and the encouragement of independent businesses.



Actions

1. Liaise with local stakeholders and owner of the Arcade to agree objectives for the enhancement and redesign of the public space adjacent to the Arcade.
2. Prepare a design brief for the development of design concepts (approximate RIBA Stage 2) for the space including the incorporation of seating areas for a cafe, imaginative play facilities, paving and planting. The study should also include:
 - Strategy for stakeholder/ public engagement
 - Cost appraisal
 - Risk assessment
 - Commissioning of a topographic survey
3. Commission consultant to set out key development principles and design expectations for the future development of the school site specifically with regard its relationship with, and connection to, the adjacent car park, Arcade and town centre, to help inform the school masterplanning process.



a High quality redesign of the space to create greater enclosure and separation from the car park and enhance the route to the Arcade.

b Define areas for outside dining in support of cafés.



c Inclusion of an imaginative play area to encourage parents and children to dwell in the town centre

d Include improved pedestrian connections between the schools and the square



Property Strategy

A core element of the recovery masterplan is property led and reflects the importance of a property strategy which directly supports and contributes to the objectives of recovery and future town centre opportunities.

The impact of the Covid pandemic has accelerated many structural trends which have increasingly shaped the high street over recent years. This is most evident in the changing composition and use of the town centre, especially the growth in vacant retail premises, which include a concentration of small shop vacancies on College Street and Wind Street and larger voids in Quay Street driven by the closures and pressures facing national multiple retailers and the challenge for securing new and viable reoccupation. The oversupply of retail combined with the loss of many traditional town centre footfall attractors emphasise the importance of securing alternative uses, including new anchors, to help broaden the range of activities and offer, extend 'dwell time' and diversify the reasons to visit the town centre throughout the day and evening. For example, this could include securing a new gym and fitness suite under consideration by Carmarthenshire CC and opportunities for providing college teaching and workshop facilities closer to the centre.

A key objective will be to encourage and promote new uses with attention on vacant and underutilised premises, including support for re-purposing to create a wider mix of uses including workspace, residential, leisure, education and community uses. This will require engagement with property owners, investors, the development industry and prospective occupiers. There will be 'areas of opportunity' which offer scope for qualitative improvements to existing property together with some sites that represent more comprehensive refocusing in the longer term. The Quay Street area is the prime example with modern empty units suitable for larger scale new uses and College Street has several opportunities for reoccupying units suitable for start-ups and smaller independents. Both areas will need safeguarding to support and encourage new businesses.

The role of public sector land and assets further offer opportunities to drive co-location and asset collaboration in the town centre to generate footfall. The town centre Hwb building and possibly the Job Centre offices (if pedestrian linkages are improved) are key opportunities for this type of use.

Project 1: Local Market Insight

Objective

In order to investigate and encourage realistic opportunities for new town centre uses, particularly through the reuse/re-purposing of vacant and underutilised premises, a property strategy requires market knowledge and proactive engagement with property owners/landlords/investors and commercial property agents active in the town centre. This is considered essential to early understanding of ownership intentions and aspirations, and market/occupier requirements. This will also align closely with the business support strategy which seeks to encourage new business activities, including the role of property in supporting a range of innovative and flexible accommodation and commercial terms/conditions for occupiers. This objective will:

- Investigate and identify key property assets that represent suitable, realistic opportunities for new uses beyond retail;
- Encourage property owners, investors and developers to consider alternative uses and re-purposing of assets that deliver economic and community value and drive town centre investment;
- Build and promote investor confidence in the town centre with support for a wider mix of uses and encouragement of modern and flexible uses;

- Encourage more flexible and innovative commercial terms/conditions for prospective occupiers especially independents to maximise affordability and de-risk exposure for landlords.

Benefits

- Reduced vacant property rates
- Increased investor confidence
- Increased level of property improvements and refurbishments that supports the local demand
- Broader range of town centre uses including residential
- Greater flexibility that encourages enterprise and business growth



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Tasks

1. Undertake regular audit and monitoring of vacant premises in the town centre to identify key landowners and investors and establish where possible owner intentions.
2. Liaise with the development industry where known requirements exist, with priority to direct new investment to the town centre.
3. Investigate potential to establish a Property Owners/Investors/Commercial Agents Forum on a regular basis to monitor property issues, identify actions/opportunities for the town centre and investigate incentives to support and encourage take up of vacant properties.

Project 2: Local Development Order

Objective

Proposals are being examined for town centre Local Development Order, a planning policy tool that promote greater flexibility and opportunity for a wider range and mix of uses in the town centre. If approved, it is important this is promoted to property owners and commercial agents to communicate the benefits of the LDO particularly at a time of major change in the property market.

Benefits

- Greater flexibility for the property market
- Directing investment towards town centre priority areas
- Increasing the viability of building improvements and mixed uses

Tasks

1. Publicise and actively promote the advantages of the Local Development Order (LDO) to property owners/landlords/developers and local commercial agents to encourage opportunities for greater flexibility of uses and re-purposing of assets, including signposting of relevant Council support initiatives where appropriate.
2. Once implemented, keep under review the LDO boundary to ensure it reflects the need for a smaller town centre and to maintain a concentration of investment in the core commercial areas.
3. Promote the opportunities for residential uses in the town centre particularly in supporting more viable development. This could include opportunities to partner with Carmarthenshire County Council Housing Services to deliver increased levels of affordable properties to rent.

Project 3: Funding Support

Objectives

There are key town centre properties which contribute to the objectives of the recovery masterplan and the wider health of the town centre, but which are likely to require a targeted regeneration investment through public sector intervention given the scale, significance and potential complexity of the properties. It will be crucial to ensure these key properties, whether vacant or subject to a change in circumstances, are brought back into beneficial use given their prospects to accommodate, potentially via re-purposing, new activities and uses which can act as anchors and footfall attractors and deliver new investment. The opportunity also exists to target properties in need of qualitative improvement to improve the quality of the built environment.

Benefits

- Intervening in property to deliver objectives for targeted priority areas
- Increasing the viability of building improvements and mixed uses
- Increasing investor confidence and encouraging the private sector to invest

Task

1. Establish a target list of strategic acquisitions that can draw down funding from the Welsh Government Transforming Towns Programme which is available for key properties in the town centre.
2. Identify and establish key target properties in town centres and keep under regular review (which align with market knowledge from Project 1 Local Market Insight and Project 4 Public Sector Land and Assets).
3. Identify a target list of properties identified as in need of qualitative improvement and prioritisation of actions, including potential support for refurbishment and fit out.

Project 4: Public Sector Land and Assets

Objectives

The role of public sector land and assets offer opportunities to investigate greater co-location and public sector asset collaboration in town centre locations. The objectives of the Transforming Towns Programme and emphasis on Town Centre First clearly support this objective, particularly given the strong presence of the public sector locally and the scope to investigate new service delivery and activities from town centre premises. This approach would contribute to major footfall generators alongside enhanced community access for services and contribute to a mixed-use destination. In Ammanford, the opportunity exists to review the existing public sector office estate and identify the potential for extending the role of the existing Hwb alongside new agile working space for Carmarthenshire CC and other public and Third Sector staff.

Benefits

- Co-location of services and office space
- Retain town centre office footfall and spend

Task

1. Proactively working with its public sector partners, including Ystadau Cymru, Carmarthenshire CC will investigate and encourage opportunities for more focused use of town centre locations by the public sector, including the Council's own services.

Project 5: Reform of business rates

Objective

The liability of business rates represents a barrier for many town centre businesses especially independents looking to grow into larger premises, but equally has cost implications for property owners when vacant and considering adaptation. The year-long business rates holiday granted for most Retail, Leisure and Hospitality businesses during 2021/22 as a part of Covid-19 economic support provides a welcome breathing space and encouragement for business to grow whilst a review of longer-term measures should be supported alongside initiatives to encourage business growth.

Benefits

- Property related business costs that support and encourage small business growth.

Task

1. To champion changes to the business rates relief and overall taxation model that support the small and independent business to grow in town centre locations.
2. Encourage property owners to investigate the adaption of town centre property which offer the greatest business rates efficiency, including innovative approaches to minimise empty rates liability which can be a major barrier to intervention.



Business Support Strategy

Recovery will also be reliant on safeguarding key sectors and cultivating local and independent business growth and scaling up through a business strategy that supports businesses to become more competitive with greater potential for attracting footfall, paying higher wages and employing more people.

This can be achieved through a targeted multi-agency approach and the encouragement of the transition from meanwhile use and market trader through to a business located in the town centre.

Key areas that will help to build the town centre of tomorrow includes improving its digital health and installing SMART technology. This will assist in attracting new investment and business resilience alongside support to develop the skills and confidence to fully exploit technology.

Project 1: Entrepreneurship and Business Support

Objective

For the town centre to recover and grow there is the need to safeguard businesses in key sectors and cultivate new local enterprises and independent business growth. The masterplan has identified an appealing range of local independent business, many making specialist goods, located outside of the town that could be encouraged to establish

a presence in the centre and improve the quality of the offering. One option is to explore the cooperative model already proven by Ammanford Arts and Crafts.

Closely aligned with the property strategy, the business support strategy is about creating a pipeline of business occupiers across a range of sectors that adds diversity and attraction to the centre. The town centre business support strategy serves several purposes:

- Establishing a place-based approach to business support reflecting the needs and opportunities specific to the town and town centre
- Encouraging new businesses with the potential to occupy a range of requirements - meanwhile spaces, market stalls or traditional commercial property
- Inspiring micro businesses to transition into larger town centre premises
- Supporting businesses to become more competitive with greater potential for attracting footfall, paying higher wages and employing more people.
- Stimulating local demand in support of public and private sector investment e.g. strategic property acquisitions, creation of business incubation space, shared work hubs and investment in reconfiguring property to match new requirements.

Benefits

- Increase business enquiries supported with advice and mentoring
- Increased number of businesses and jobs safeguarded
- Increased number of new businesses
- Increased rate of micro and small business growth
- Creation of tailored support packages to encourage investment in key sectors
- Decreased levels of vacant property

Tasks

With several agencies providing support to businesses of various sizes and operating across a broad range of sectors, the delivery of business support at a place-based level requires a coordinated and targeted approach.

1. Bring all aspects of business support into one place (either virtual and/or as part of a Hwb), making it clear and simple for businesses to access and find the help they need. The role of the Carmarthenshire CC Economic Development team is helping to simplify for entrepreneurs and businesses a complex picture of entrepreneurship and business support products and ensuring coordinated multi-agency delivery. Partners include the Council, Business Wales, Federation of Small Businesses,

South Wales Chamber, Centre for Business and Social Action, MenTrau Iaith, University of Wales Trinity Saint David, Coleg Sir Gar, etc.

2. Promote and communicate at a town level the range of support available and target entrepreneurs and businesses via schools and colleges, businesses groups and organisations and targeting existing town centre traders.
3. Provide access to a helpline, website, and one-to-one sector-focused support, provide free support and guidance at any stage of the business life-cycle:
 - Starting a business
 - Growing a business
 - Developing skills
 - Networking
 - Finding finance
 - Finding a property

Project 2: Digital Town Centre & Skills

Objectives

Given the pressure on the High Street and the impact of COVID-19, it's important that businesses can exploit digital technology, in the same way as supermarkets and shopping centres have done for years. This provides businesses with the opportunity to grow their market and increase turnover locally and globally whilst remaining rooted in the town.

The digital health of Ammanford has demonstrated that just 27% of town centre business are active on social media where the majority of consumers 'hang-out' and can be influenced. Digital health is also influenced by the availability of new technology that exists and is already being used in Welsh towns to help business and places make informed decisions and plan for the future. The objective is to invest in infrastructure in support of creating a SMART town with businesses supported to make the best use of digital to grow their business. This includes:

- Putting in place ultra-fast, ultra-reliable connectivity and innovation networks
- Providing the support, training and encouragement network that helps to create a digital culture and enhanced business skills.

Benefits

- Increased levels of town centre business active on social media
- Increased digital competency levels, qualifications and use of digital technologies
- Increased frequency of business collaboration using social media & technology

Task

1. Carmarthenshire CC as lead authority for the Digital Infrastructure Programme of the Swansea Bay City Deal will work to ensure ultra-fast, ultra-reliable digital infrastructure and connectivity is available for the town to include but not limited to full-fibre gigabit-capable broadband, 4G/5G mobile, and Internet of Things (IoT) innovation networks.
2. Continue to build the Carmarthenshire Innovation Network, an 'Internet of Things' network for businesses, communities, and partners to exploit. Ensure Ammanford is prioritised for coverage along with other primary towns in the County.
3. As part of the business support package, and alongside initiatives including Super-Fast Business Wales, investigate and target the town centre with a Digital Initiative through a combination of, but not limited to, digital events, awareness, skills and support to thrive and take advantage of the digital opportunities
4. Adopt a social media data and insights tool for the town and its businesses that provide data, expertise, knowledge, training and support to help them to connect with their audience, to analyse what content engages them and measure what's impacting business results.

Place Management Strategy

Town centres are places that attract a diverse mixture of people from the everyday user, creative, entrepreneurial and explorer, and no masterplan can force a lively attractive centre into being, but it can create the conditions that allow that to grow.

A prosperous town centre must be a place where people are safe, well managed and excited to be. And as it's no longer possible to guarantee the daytime footfall of shoppers and local workforce, more than ever the town centre must become more stimulating, exciting, community and cultural destinations both during the day and at night.

Ammanford has a strong track record of local events that enliven the town and generate a lot of local support. In 2018 the town was Carmarthenshire's Cultural Town with a wide-ranging events programme covering language, culture, sports and seasonal events such as Halloween and Christmas. Many of these events have been led by the County and Town Councils and moving forward there is the need for a sustainable local group or organisation with strong business representation and the necessary time and resources to drive forward events and promotion in the town. Also, such an organisation can provide businesses with a stronger influence in shaping business support and investment in local infrastructure and town centre improvements.

Project 1: Place Management Organisation

Objective

Investigate option for the creation of a place management group or organisation with a strong business voice and the necessary time and resources to drive forward a local programme of events, marketing and coordination of local initiatives. There are several options to consider including a voluntary partnership and a Business Improvement District similar to Llanelli and Carmarthen.

Benefits

- Business-led group or organisation driving forward town centre activities and the promotion of the town.

Task

1. Undertake consultation/feasibility work with local businesses and stakeholders to establish what new programme of events and marketing might look like, how much it might cost and how to fund it.
2. Identify funding opportunities to support either a town centre management group/organisation and/or feasibility study for a BID.



Project 2: Culture & entertainment

Objective

As the town centre becomes less about shopping and more about the experience, cultural activity and attractions become more important than ever in ensuring vitality. Cultural destinations (arts, heritage, entertainment) with a broad appeal anchored in the centre need to be safeguarded. In Ammanford, this includes The Miners theatre and local art galleries. Local events also provide an important part of the cultural experience covering language and culture, heritage, food and drink, sport and entertainment.

Benefits

- Increased footfall and town centre visitors
- Enhanced local identity and positive reputation

Tasks

1. Prioritise growing the calendar of events led by a town centre management group/organisation.
2. Draw up a marketing and communication plan with a focus on attracting the local community and visitors from the nearby catchments area

Project 3: Transport & Movement

Objective

The reliance on private vehicles needs to diminish if we are to meet the challenges of climate change and a fully integrated public transport service connecting rail, bus and cycle hire schemes would allow people to easily connect with and travel into and around the town from surrounding neighbourhoods.

As part of the wider investment in cycling across Carmarthenshire, Ammanford has grown its reputation as a stopping off point along local and national cycling routes. Growing the active travel infrastructure of the town, the option exists to extend the new Brompton Bike Hire scheme introduced for Carmarthen and Llanelli to link either of the two out of town train stations at Pantyffynnon and Dyffryn Road with the town centre and the bus station. The Brompton scheme provides a versatile folding bike scheme that supports travel to work, home, and on public transport.

An E-bike charging points will also be installed in the town at the Leisure Centre as part of a wider network of electric bike improvements. And the Carmarthenshire CC have also purchased E-Cargo Bikes for town centre businesses to utilise.

Car parking charges have been a concern of some town centre businesses for some time and Carmarthenshire CC has developed free parking days planned and advertise with local businesses and the current free parking scheme on Mondays and Wednesdays between 10 am and 2 pm in Council car parks. Revenue from car parking funds directly supports highway improvements and transportation services in support of the town centre.

Benefits

- Increased levels of walking and cycling journeys
- Increased use of active travel for business journeys

Tasks

1. Investigate opportunities for a Brompton Bike Dock located in the town.
2. Helping local businesses with new local logistics solutions through E-cargo bikes will require a clear strategy to encourage businesses to adopt the bikes as part of their business and to overcome practical barriers including adequate bike storage.
3. Continue to monitor the impact of town centre car parking charges during the period of their recovery from Covid-19 and the effectiveness of the free parking initiatives already in place.

Delivery

Whilst investment in projects funded through programmes such as the Targeted Regeneration Investment (TRI) continue to make a difference, the masterplan identified that more is required.

The recovery masterplan is for everyone, not just Carmarthenshire CC, and it will require commitment and effort from all stakeholders if the town is to achieve success and deliver continued prosperity for the centre. This new plan is necessary to provide a clear pathway to town centre recovery and growth and it will be focused upon Business, People and Place, providing the framework in which prioritised actions over three levels of importance:

1. Immediate - actioning of quick-win permanent or temporary schemes, to take advantage of potential opportunities arising after the end of lockdown and for the remainder of 2021
2. Short term - delivery within the next 24 months - priority transformational projects that may require planning, funding, approvals and may cause some disruption during delivery
3. Strategic - Significant projects and strategies that will help guide the town centres direction to be resilient and to respond to long term changes

Place projects

- Project 1: Railway Crossing
- Project 2: Quay Street & Market Square
- Project 3: Wind Street Junction Improvements
- Project 4: Margaret Street & College Street

Property projects

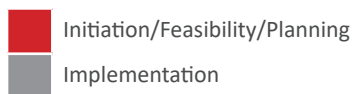
- Project 1: Local Market Insight
- Project 2: Local Development Order
- Project 3: Funding Support
- Project 4: Public Sector Land and Assets
- Project 5: Reform of business rates

Business projects

- Project 1: Entrepreneurship & Business Support
- Project 2: Digital Town Centre & Skills

Place management projects

- Project 1: Place Management Organisation
- Project 2: Culture & Entertainment
- Project 3: Transport & Movement



Year 1 Year 2 Year 3 Year 4 Year 5+



Priorities

A series of projects are set out by the masterplan, however, it is recognised that it is unlikely that everything can be tackled at once and there will be the need to focus on the most important and high impact projects. All the actions identified support recovery and long term growth. Where more complex but high priority projects are identified, early development of outline business case and design development should be prioritised.

Projects that are likely to be funded from existing capital or revenue streams or through the immediate funding opportunities identified below, should be a priority.

To help deliver and drive forward the masterplan, the potential exists for funding support to the Local Authority to support improved town centre management/organisation with specific responsibility for the recovery of the town centre and the implementation of town centre initiatives.

Funding

The funding landscape in Wales is experiencing a period of rapid transformation, this is being led by Welsh Government and the Local Authority in response to the pandemic and the UK Government with responsibility for the replacement funding programs following the UK's departure from the EU. At the time of writing some uncertainty exists around how some funding will be delivered. In light of this, the masterplan needs to be responsive over the coming 12-24 months and aligned to these emerging programs.

Welsh Government – Transforming Towns Programme

Existing Targeted Regeneration Investment (TRI) program comes to an end in 2020/2021 and is replaced by the Transforming Towns Programme. This is a broad and flexible package of support that allows partners to decide upon the most appropriate mix of interventions and how to put them into practice effectively in each town. The new funding package will offer support for a wide range of projects, from green infrastructure developments, internal and external improvements for business owners, improvement of town centre markets, the support of new uses for vacant buildings, and driving activity to support the 'digital towns' agenda. Those eligible to apply for funding include local authorities, town centre businesses, Business Improvement Districts and Town and Community Councils.

UK Government

- The UK Government published in March 2021 the prospectus documents on how local areas in Wales will be able to submit bids for the Levelling Up Fund and Shared Prosperity Fund (Community Renewal Fund for 2021-22) as a direct replacement for EU structural funds in Wales.
- Levelling Up Fund – small in scale and geography including regenerating a town centre, local investment in cultural facilities or upgrading local transport infrastructure. Delivered by local authorities who can submit one bid for every MP whose constituency lies wholly within their boundary with preference given to bids from higher priority areas including Carmarthenshire.
- Shared Prosperity Fund – EU Structural Funds will continue until 2023 and replaced through the new UK Shared Prosperity Fund. This new Fund, to be launched in 2022, will operate through the UK Government but to start with the UK Community Renewal Fund being provided for 2021-22 and targets priority local authority areas including Carmarthenshire.

Carmarthenshire County Council

In response to COVID-19, the Council has established underpinning resources to support the recovery and growth of towns and the wider economy. Working with the Welsh Government, a range of new initiatives and business support will be made available.

Business Recovery and Support

Subject to formal approval it is anticipated that the County Council led business recovery and support funding streams will be made available in 2021

- Recovery Fund to safeguard/create sustainable jobs within target growth sectors
- Revenue Support Fund to invest in skills, marketing and diversification to safeguard and grow jobs.
- Carmarthenshire Rural Enterprise Fund - development of new and existing business premises
- Transformational Commercial Property Development Fund - to provide financial assistance for the construction of buildings for industrial and commercial use.
- Business Start-Up Fund - capital support for the creation of new businesses resulting directly in the creation of jobs
- Business Growth Fund - support towards capital expenditure projects and specialist revenue expenditure, where new jobs are created

Local Marketing and Distinctiveness

Funding has been secured via the Leader programme to promote rural Carmarthenshire to tourists - led by Carmarthenshire CC Marketing & Media Team to develop stories and reasons to visit, those that amplify

Welsh culture, language, locally produced produce etc. and deliver a marketing action plan (including branded promotional material, prepared social media content e.g. text, images and video, a business toolkit.

Empty Premises/Meanwhile Uses

Welsh Government funding to develop a good practice guide for the region enabling communities to develop empty premises into 'meanwhile' spaces or pop up shops, providing practical advice on legal issues, business rates etc.. Potential to utilise the £10k Leader funding to fit out empty premises for this purpose

A Circular Economy - A Sustainable Recovery From Covid-19

County Council is currently developing a strategy to support local investment in circular businesses and enterprises; that is, enterprises that keep things in use longer, through re-use, repair, re-manufacture and refurbishment, and in doing so, helping regenerate the community by adding jobs and developing skills locally. By doing this locally, the initiative will not only keep money in circulation within the county but vitally also reduce the impact that Carmarthenshire has on the environment. New potential projects are encouraged with local stakeholders, business owner, entrepreneur, volunteer etc.

The delivery plan indicates time-scales, suggested delivery partners and next steps. In each instance, a detailed review of the project scope would be required and or more detailed design work to provide costings.

The plan includes three stages, short, medium and long term with a suggested level of priority afforded based on stakeholder engagement and the need to complete certain tasks such as data collection to enable the development of key projects.

* Since the publication of the Recovery Masterplan, the Wales Audit Office has published a Regenerating Town Centres Tool Kit for Local Authorities to self assess their approaches and improve their work on town centres. The masterplan has followed the principles of the Tool Kit and Carmarthenshire Council will fully adopt these principles going forward.



Carmarthen Town Centre

Recovery Masterplan

Prepared for
Carmarthenshire County
Council

October 2021

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1 Purpose & Context

This recovery masterplan has been commissioned for Carmarthen town centre by Carmarthenshire County Council (Carmarthenshire CC) in response to the effects of the COVID-19 pandemic. The masterplan reviews existing regeneration activity and provides a fresh focus on the priorities and the strategy for recovery and future growth.

At the current time, the long term effects of the COVID-19 crisis are highly uncertain which makes it difficult to draw a clear picture of the future. As we manage and adjust to the pandemic moving forward, there is the need to rethink the shape and purpose of the town centre and how to positively respond to longer term changes.

This recovery masterplan has been prepared with the contributions of local businesses and stakeholders to help steer the immediate actions in support of town centre recovery and to provide the framework to help re-imagine longer term regeneration and growth. Furthermore, at a time when Carmarthenshire as a whole is suffering from the effects of the pandemic, the recovery masterplan aligns with the priorities and actions that will support the Carmarthenshire wide economic recovery¹.

¹Carmarthenshire Economic Recovery and Delivery Plan, Carmarthenshire Council 2021

Carmarthen town centre profile

- A multi-functional and historic town centre which serves an important regional role for a wide rural catchment in West Wales anchored by non-essential retail, leisure and hospitality, employment and administrative function as the county town.
- The centre supports a blended mix of national retailer representation and independents spread across a relatively large shopping area with two shopping centres; Merlin's Walk and St Catherine's Walk.
- Primarily a comparison (non food) led centre with key retail anchors including Debenhams (closing) and Marks & Spencer together with a commercial leisure offer (Vue cinema) and national food & drink operators focused at St Catherine's Walk.
- There are a number of entertainment, arts, culture and theatre attractors in the centre which contribute to the destination appeal.
- An historic and distinctive central area focused around Nott Square, Guildhall Square and the castle together with traditional independent business areas of King Street and Lamma Street which are complemented by more modern shopping centres.
- An established indoor market together with outdoor market (held twice weekly).
- A town centre which benefits from visits and expenditure from tourists and workers alongside traditional shoppers in the catchment area, characterised by a relatively wealthy shopper profile and local levels of prosperity.
- Focus for ongoing transformation with mature partnerships in place and guided by the priorities of the town centre masterplan, the town regeneration forum and its sub groups, Carmarthen BID and committed County Council and European funded projects.

2 The Impact of COVID-19

The impacts of COVID-19 are huge, unprecedented and continue to cloud the economic outlook. The effects on the town centre have been driven by several inter-related shocks including forced closures, social distancing, accelerated online shopping and structural changes for national multiple retailers.

Whilst impacts have been largely negative, some positive changes have also arisen including strengthened community networks, support for local businesses and 'shop local'. It has also supported growth in business innovation, diversification and created new business opportunities.

The Economic Impact Assessment of COVID-19 on Carmarthen town centre² identified the immediate and some potentially longer term impacts that shape this masterplan.

² Carmarthen Town Centre – Economic Impact Assessment of COVID-19, December 2020, Owen Davies Consulting Ltd



- £1.3M – the estimated amount of weekly spending on non-essential retail, services, leisure and hospitality that has been lost during periods of lockdown. These hard hit sectors are all well represented in Carmarthen town centre.
- Over 80% decline in footfall at its lowest level (April 2020) compared to a year earlier. Even during the summer 'unlock', weekly footfall over August 2020 remained circa 55-60% of the previous year. Compared to the other primary towns in the county, the town centre has suffered a major drop in footfall **reflecting its role as a regional destination with a wide catchment area**, appeal to tourists and town centre workers, which have all been impacted by lockdown and travel restrictions.
- **17% vacancy rate reflecting the impacts of store closures** especially amongst the national multiples some of which represent large units. Further closures are anticipated in 2021.
- Impacts on the wider Carmarthen economy have been modelled and show reduced productivity, loss of employment with accommodation and food services businesses expected to **experience significant closures**. Prosperity measured in terms of average household income is lower than average.

Future drivers of change

Post COVID-19 life will likely be different to what many were used to with the pandemic accelerating many pre-existing structural trends as well as people forming new habits. This means people are unlikely to return entirely to the old behaviours. However, there remains uncertainty with how permanent these changes will prove once COVID-19 is no longer a threat and people can return to normal work patterns and socialising. The future drivers of change (Figure 1) are likely to have both positives and negatives effects for businesses and the people that use the town centre.

	Negatives	Positives
National multiple retailers	Loss of footfall as brands that once provided an important customer draw continue to restructure/close	Prime frontage become available for ambitious independents
Office space	New pattern of working from home reduces number and frequency of office workers commuting to the town	Working from home and reduced out-commuting increase opportunity for more localised spending and activity
	Demand for office spaces decline	Opportunity for combined agile office hubs and shared workspace.
Online shopping	Continued growth of online shopping results in long term loss of footfall	Brick & mortar businesses grow trade online to reach new markets & customers
	Retail – require smaller sales areas and different type of space to allow increased storage and back office	Business offering quality, specialist and experience led retail and personal services likely to grow.
Property	Decline in demand for retail and office space results in decline in property value/income for owners/investors	Lower ‘attractive’ rents and more flexible terms encourages independent business start-ups and existing business growth
	Declining viability and willingness to adapt property and invest	Landlords/property owners are incentivised to work in partnership with public sector and play an active role in regeneration
Place & attractiveness	Cautious consumers and ongoing health concerns attracts customers to locations considered safer e.g. retail parks	Opportunity to re-shape public spaces and improve pedestrian environments
	Loss of retail character and dominance of shopping	Space for new and intensified uses – residential, leisure, health, culture. Growth of new customers – e.g., homeworker meetings/ lunchtime hospitality
	Loss of hospitality, culture, leisure businesses that offer ‘experiences’ but have also been hardest hit	Greater emphasis on experience & ‘place’

Figure 1: Drivers of change

3 Key Issues & Opportunities for the Town Centre

People

Understanding the characteristics of the people who live nearby and potentially work, visit and use the town centre is an underpinning element of the masterplan. Once social distancing restrictions are lifted, it will become clearer how people’s behaviour and preferences have been altered, and this will determine how businesses, leisure and cultural attractions adapt as a result. It will be important for the masterplan to safeguard the businesses and activities that current customers want as well as attracting new users by understanding who they are and what they desire.

Community Profile

CACI data³ provides a 2020 data position prior to the pandemic and confirms a relatively wealthy shopper profile of those using Carmarthen town centre (Figure 2).

It confirmed town centre visitors as orientated towards the Acorn group profile categories of ‘Comfortable Communities’, particularly the dominant sub-category of ‘countryside communities’ which accounted for approximately half of all centre users - in part a reflection of the wide rural hinterland served by Carmarthen. There is also an underlying level of affluence particularly associated with ‘mature money’ which result in over 70% of town centre users considered to be above average in prosperity terms with associated levels of expenditure but equally expectations for quality and variety to meet requirements. By contrast, circa 23% of town centre users are identified as ‘Financially Stretched’ with the majority sub-group identified as ‘modest means’ (younger families in smaller homes with below average incomes) which reflect the importance of value and convenience as key considerations.

³CACI Retail Footprint Report – Carmarthen 2020

Category	% Using the centre
Comfortable Communities	58%
Affluent Achievers	14%
Financially Stretched	23%

Figure 2 – Acorn consumer segmentation. Source CACI 2020

Spending

In assessing expenditure patterns, CACI confirms the role, function and attraction of Carmarthen town centre as an important regional centre with over 77% (£74m) of comparison (non-food) expenditure from its shopping catchment area. In addition, local workers are estimated to contribute £5m (5.2%) of expenditure whilst the contribution of tourists/visitors to the town centre is significant – accounting for £22m (17.7%) of expenditure. Together, these spend estimates confirm the multi-functional appeal of the town centre to a variety of users with nearly a quarter of expenditure derived from visitors, and to a lesser extent, local workers.

Analysis of average weekly spend data by CACI (Figure 3) recognise the essential expenditure on convenience goods (food) but also at the town centre level of expenditure on clothing/footwear, and eating & drinking. This reflects the level of clothing and footwear offer available in the town centre, split across national multiples and independents, whilst the spend on local food and drink facilities indicate the destination status for many users.

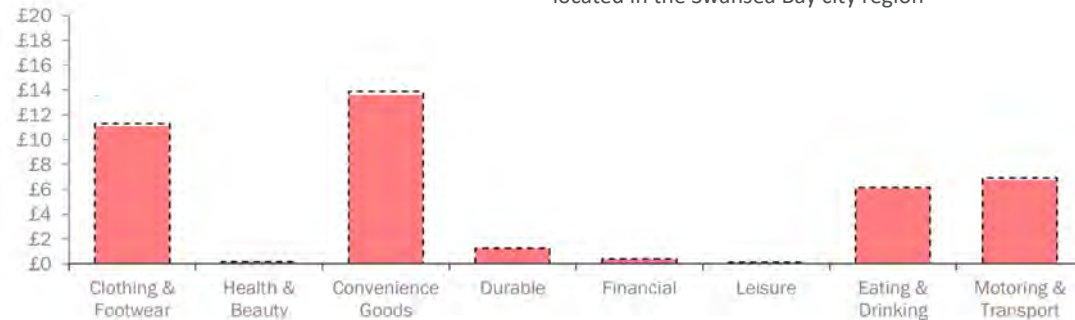


Figure 3: Average weekly household spend
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Commuting

Prior to COVID-19, some 1,000 people commuted daily out of Carmarthen with the main destinations for commuters identified to be Swansea, Llanelli, Cross Hands and Cardiff. By contrast, as a county town and key regional location for many public sector organisations, Carmarthen attracts more in-commuters than out-commuters, particularly Llanelli, and the Cross Hands, Kidwelly and Ammanford areas. The potential for future changes in commuting trends and resultant implications for working patterns and workspace requirements (including flexible and innovative workspace), will likely have implications for the town centre.

Outlook

Whilst Carmarthen town centre has proved to be a popular and well performing centre, it is recognised the town centre has been more exposed to the impacts of COVID-19 when compared to many other town centres for a variety of reasons. This includes its core composition and offer which is predominantly oriented towards non-essential, leisure and hospitality uses but also as a consequence of its status as a county town and regional shopping/leisure destination to a wide hinterland. The direct impacts of lockdown, temporary closures, travel restrictions on visitors and working from home by previously centrally based workers have, collectively, contributed to falling footfall and reduced expenditure in the town centre.

This remains a challenge but there remain fundamental and positive credentials for the town centre which offers a unique cultural and heritage destination set in the context of its strong foundation of specialist independents and national multiples together with focus for entertainment, arts, hospitality, work and education. Furthermore, the local area and socio-economic profile of existing town centre users indicate a relatively affluent population which offers a good base for supporting recovery from a regeneration and investment perspective.

The town is identified as an area of Transformation⁴ and focus for investment particularly at Carmarthen West following the delivery of Yr Egin creative

and digital centre delivered at University of Wales Trinity Saint David. This offers potential to expand the creative and digital sector in the town centre, potentially linked to a greater student presence in the centre given the significant number of students at the university and also Coleg Sir Gar. The town centre is an integral element of this 'Transformation' with the town centre regeneration masterplan⁵ outlining key priorities for the central area. This recovery masterplan complements the existing framework which is supported by the ongoing work of the Regeneration Forum's sub-groups.

At the national level, Carmarthen is identified as a Regional Growth Area in the Future Wales plan⁶ which seeks to grow, develop and offer a variety of commercial and public services that will act as the focal point for their areas. Coupled with the principle of 'Town Centres First', this has potential to further strengthen investment and facilities in Carmarthen town centre.

⁴ A strategic regeneration plan for Carmarthenshire 2015-2030 – Transformations, Carmarthenshire CC

⁵ Carmarthen Town Regeneration Masterplan 2014 – 2030, Capita 2014

⁶ Future Wales: The National Plan 2040, Welsh Government

Business

The key driver of the recovery masterplan is the need to safeguard viable local businesses particularly those which contribute to quality, experience and diversity of uses. The masterplan also recognises the need to support businesses which are capable of opening up and responding to new markets, and targeting/capturing new customers, whether they are new enterprises or established businesses ambitious to evolve and grow.

CACI data for Carmarthen town centre (Figure 4) confirms the composition which can be characterised by an over representation of health and beauty, 'other' retail and eating/drinking offer. This is not surprising given the scale, diversity and extent of the retail offer. Equally, the concentration on non-essential retail confirms a low level of convenience (food) provision. The changing nature of the retail sector will likely further impact on the composition of the town centre although Carmarthen continues to retain a healthy range, choice and offer of clothing and footwear retailers, whilst the shift towards more personal and experience led services such as leisure, health and beauty, and eating & drinking, appear to be well established in supporting these trends.

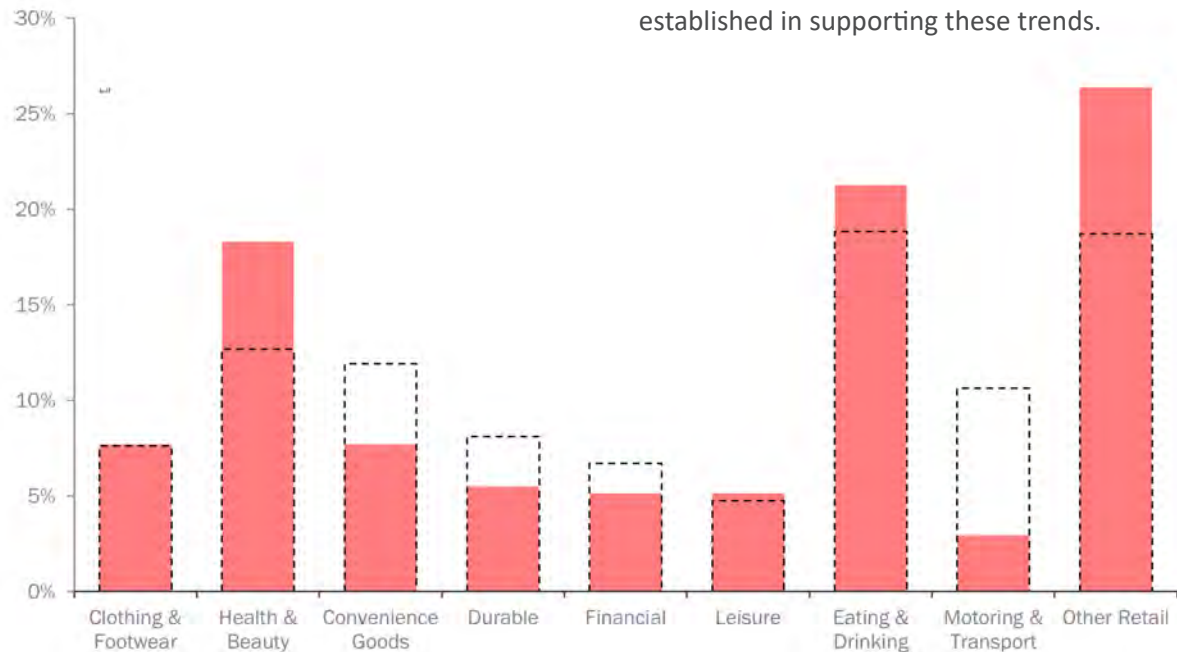


Figure 4: Town centre composition

Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Diversity & Speciality

The town centre provides a comprehensive blended mix of uses and services, many by high quality independent businesses (Figure 5) which contribute to its attraction and appeal as a visit destination. This variety and choice extends across numerous uses, some specialist in nature and which have developed a loyal customer base. This mix of independents ensures a unique and distinct shopping, leisure and hospitality experience with certain parts of the town centre characterised as 'independent quarters' such as King Street, which differentiate from other areas of the centre. In addition, the very nature of independent businesses ensures variety of product offer; customer experience, advice and service, and shop-front and display.

The extent of the independent business community in the town centre provides opportunities to develop and strengthen representation throughout the town, particularly given the ability to more readily manage, respond and implement change. There is good evidence of business expansion by independent retailers in the town centre, including take up of larger vacant units formally occupied by national multiples. This reflects a positive commitment by occupiers to 'scale up' and refocus their presence and position alongside flexibility and support on the part of landlords to encourage and promote opportunities for those who previously faced barriers to larger premises.

Creative Industries

The significant investment at Yr Egin represents a strategic opportunity to grow Carmarthen's role as a creative industries hub based around Welsh Language media. To capitalise on this unique facility, this recovery masterplan recognises the potential to explore and promote opportunities for creative and digital industries in the town centre, including its potential to link activities with the University of Wales Trinity Saint David. This has implications for supporting new activities and uses of buildings (potentially re-purposing vacant properties) alongside the creation of new footfall generators and importantly help to further promote the creative offer of Carmarthen.



Figure 5: Examples of independent businesses in Carmarthen town centre

Business Property

With weakening demand and the general decline in retail (including larger format stores), opportunities exist to repurpose and adapt a large amount of town centre property. A consequence of structural change has been the growth in the vacancy rate, as evidenced in Carmarthen town centre, with particular issues arising from the closure of national multiples and resultant large vacant units which present greater challenges for securing realistic prospects for reoccupation. Vacancies are distributed throughout the centre although a concentration of units exist in Red Street and Cambrian Way whilst the owners of St Catherine's Walk and Merlin's Walk are proactively seeking to address voids where they exist, which include the closure of Debenhams, the largest unit and a significant attractor for the town centre.

The key issue will be to focus beyond retail use and to avoid a 'hollowing out' of the town centre. There will be the need to secure new occupiers with attention and priority on identifying new uses which can drive footfall and activity such as residential, leisure, workspace, education, community and public services. Given the extent of the public sector presence in Carmarthen, opportunities exist for P
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e County Council and its partners, including the university and college to explore the scope to bring services and facilities into the town centre that can make use of vacant premises. This will be of relevance to the largest units.

In addition, to ensure the independent and small business community can grow and flourish locally, it will be important to ensure suitable property is available, which can provide for modern and flexible needs but also ensures flexibility, innovation and affordability in regard to rental and lease terms/conditions. This will better help support opportunistic businesses willing to invest whilst responding to changes in market and commercial trends. Where re-purposing and adaptation is necessary, it will be important to recognise the viability considerations for property owners/ investors.

The proposed Local Development Order (LDO) for Carmarthen town centre will be a critical policy tool to promote flexibility of uses that can be enacted relatively quickly. An LDO, if approved in 2021, will provide general planning consent for a wider range of uses at ground and upper floor level, removing the need for planning applications and streamlines the planning system, lowering barriers to a range of alternative uses and investment.

Digital and Social Media

Growing small businesses and transitioning to medium and potentially larger scale operations requires improved productivity and market reach. It is likely that growing an effective online customer base will be an important part of this future business growth.

Our review of Carmarthen digital health suggests that not enough is being done by most local businesses online to maximise their communication - although the presence of some proactive local businesses, community groups and Carmarthen BID are seeking to raise the vital importance of digital and social media exposure to help raise business profile and profitability.

66% of UK consumers spend 3hr day on social media

52% of UK consumers use social media to research purchases

Only 30% of Carmarthen's town centre businesses active on social media

There is major scope to improve the online presence of the town centre businesses with data suggesting generally weak levels of social media engagement by the business community with less than a third actively engaged.

Given the vital importance of online presence for modern business, this could be strengthened considerably to drive further local and independent business growth.

Place

The Recovery Masterplan has benefited from the 'Carmarthen Town Regeneration Masterplan', an earlier masterplanning exercise undertaken in 2014. This study appraises the urban conditions that characterise the town centre and identifies a number of potential projects. The Recovery Masterplan does not seek to replicate this work, but instead review it alongside other ongoing and planned projects, to identify priority interventions and strategies to support the survival and recovery of the town centre especially in response to the pandemic and notable trends in the retail sector. These 'Place Projects' are described in more detail in the following sections.

With regard to the town's sense of identity, Carmarthen claims to be the oldest town in Wales and evidence of its rich history is certainly a key defining feature of the town centre. Its character is largely defined by a medieval street pattern and numerous listed buildings, particularly concentrated along King Street and Nott Square including the Grade I listed Guildhall and St Peter's Church, and the Castle, which is Grade I listed and a Scheduled Ancient Monument.

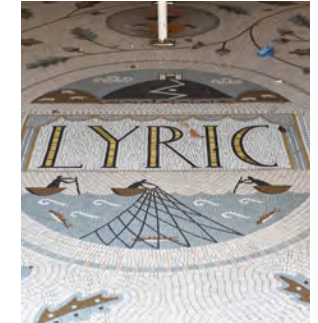
The structure of the town centre has a distinctly radial pattern with key routes converging on the junction of Blue Street, Red Street and Guildhall Square.

From here, the historic character continues to the west along Lammas Street and east along King Street which connects with Nott Square and Guildhall Square with St Peter's Church. However, to the north of these routes, the primary retail frontage which lines Red Street connecting to the St Catherine's Centre is defined by large format retail units and modern architecture and public realm, in stark contrast to the adjacent areas of heritage.

This radial pattern with numerous changes in direction and irregular arrangement creates a characterful network of streets, spaces and alleyways, and the perception that the town centre is extensive. Between these radial routes the townscape is often fragmented and dominated by service yards, car parks and the blank rears of buildings.

Generally, the quality of the public realm is lacklustre and does not complement or meet the standards set by its attractive historic buildings. There is also a distinct lack of green space and trees. Although relatively close the River Towy, the town centres connection with the riverside is compromised by the change in level, lack of direct pedestrian routes, and the busy Coracle Way road.

Overall, Carmarthen benefits from a wealth of historic and cultural assets, and places of interest however, the potential of these assets is currently not realised. Investment to reinforce the town's 'sense of place' is required to help create a setting that supports businesses, attracts new visitors and creates a desirable place to live and spend time in.





Opportunity for retail core to adapt to changing context and refresh its public realm and street activity

Opportunities to enhance existing routes and create new spaces

Opportunity to define and celebrate a 'Cultural Quarter' centred on King Street

Imperative to enhance the setting of the historic core as the 'heart' of the town centre

Connection and relationship between the town centre and the riverside should be strengthened

Summary of Key Challenges & Opportunities

Challenges

- Vulnerability and threat to its regional shopping role including the loss of major branded retail
- Shift to remote working has led to a marked reduction in office workers using the town centre particularly given the extent of the public sector in Carmarthen
- Growth in vacant property, many relatively large which have potential to ‘hollow out’ the town centre
- Maintaining a strong enough attraction and appeal of the centre to a wide and relatively affluent catchment area compared to other nearby centres
- Weakening demand for retail and realistic prospects for securing take-up given an oversupply of units
- Low levels of digital business engagement by businesses
- Safeguarding and retaining the remaining retail anchors and leisure attractors
- Flood risk at the riverside edge of town centre

Opportunities

- The mix of retail, leisure and employment mixed with culture and heritage which already provide an experience-led destination
- Strong foundation base of interesting and specialist independents
- Existing entertainment, hospitality, arts, culture and theatre including ongoing investment
- Re-purposing of the central core to create new uses and activities including flexible workspace and residential
- Extend public sector services and facilities in the town centre
- Requirements in for Carmarthen town for a new hotel
- Build on the creative and digital industry at Yr Egin to develop a greater role for the creative industries
- Extend the local markets (indoor and street) to ‘showcase local’
- Enhance outdoor spaces to support the growth of hospitality, social gathering and well being
- Promote the quality of place and improve linkages through the town centre
- Jacksons Lane as a focus for regeneration activity

Summary of Key Objectives

To drive forward the plan for recovery and growth and to provide a focus for the strategy and delivery plan the following objectives for the town centre have been identified:

- Safeguard, protect and strengthen the regional role of Carmarthen town centre as a destination for retail, leisure, hospitality, culture, employment, education and residential.
- Concentrate activity on the central core to avoid ‘hollowing out’ and maximise opportunities for a greater mix of uses through the reuse and re-purposing of empty and underused buildings in an area undergoing significant change.
- Strengthen the leisure and hospitality facilities of the town centre to enhance the under-performing evening economy and develop the tourist infrastructure that provides a year-round offer, including the opportunity for a new hotel.
- Support and encourage small and independent businesses to develop, grow and expand in the town centre.
- Expand the public sector presence in the town centre, including opportunities to deliver new service provision (health and well-being, leisure, local services/advice hwb, residential) and collaboration with third sector organisations, to generate footfall ‘anchors’ and utilise empty premises.
- Build on the opportunities for greater links between the University and town centre including the scope for educational and cultural activities to complement the cultural quarter, and specifically the potential for a creative and digital hub linked to Yr Egin.
- Encourage the growth of the outdoor market to include a greater number of stalls and potential for a new theme/style of markets.
- Ensure improvements to the quality of outdoor spaces, especially Jacksons Lane, to deliver a safe, attractive, inviting and stimulating town centre environment that supports the hospitality sector and evening economy.
- Improve pedestrian and cycle linkages throughout the town centre, many of which are of poor quality.
- Establish a SMART town with businesses making best use of digital to grow their market reach, turnover and footfall.
- Initiatives that ensure a range of stakeholders are involved in delivering improvements for the town centre.
- Encourage decarbonisation through low carbon and climate-resilient infrastructure, renewable energy and sustainable developments.
- Support for the use and promotion of the Welsh language and culture.

4 The Recovery Masterplan

Carmarthen town centre faces ongoing challenges and transition as it adapts to wider structural changes and the effects of the pandemic on its regional role as a retail, leisure and employment centre.

A flexible approach towards recovery and growth will be required which seeks to safeguard the town's role as a regional centre for employment and shopping effected by the pandemic. The strategy focusses on the positive attributes that already exist alongside the need for diversification and is driven by a focus to support and nurture local business, promote a mix of uses for a variety of people, and strengthen and rejuvenate the town centre as a more attractive place.

The strategy seeks to broaden and extend the range of uses beyond the traditional retail led and employment role but equally safeguard existing anchors and attractors. This shift and re-purposing towards a multi-purpose destination provides genuine opportunity to respond to the evolution in modern retail, leisure and hospitality trends for existing and new businesses together with genuine encouragement for new uses, particularly residential, flexible workspace, education, cultural and social/community activities. Recent interest from hotel operators in the town centre has provided encouragement that greater levels of diversity can be achieved and would help to grow a generally under-performing evening economy. The future contribution of the public sector to the town centre, given its long-standing administrative

role, is also likely to change and provides an opportunity to reconsider the way that local services are delivered and more agile working is provided within the town centre.

A greater concentration of new activity on the core town centre will help to support and widen economic activity and vibrancy throughout the day and evening, extending the reasons to visit for local residents, workers and visitors alike.

The town centre also offers significant opportunity for environmental improvement, especially of the public realm to help showcase the quality of the heritage and to encourage greater use of its high-quality outdoor spaces. The central area combines a number of distinct areas and more can be done to promote the town as a genuine experience led destination which maximises the advantages of the town's history, Welsh culture and regional centre facilities.

Spatial Priority Areas

The recovery masterplan is concentrated around four distinct strategy areas, which provide the spatial focus for action and intervention.

The Eastern Gateway/Cultural Quarter

A priority area for improving the public realm and driving regeneration, mixed-use activity and support for small independent businesses, cultural activity and the evening economy in an area that is facing transition with some prominent vacant buildings alongside some core cultural assets and development sites.

The Historic Core

A priority area which represents the heritage asset of the town centre, and the link between the old and new town. Significant opportunity for greater public use of the outdoor spaces as a safe pedestrian focus for cultural, food and drink, and entertainment activities throughout the day/evening alongside qualitative improvements to enhance the outdoor experience.

The Central Commercial Core

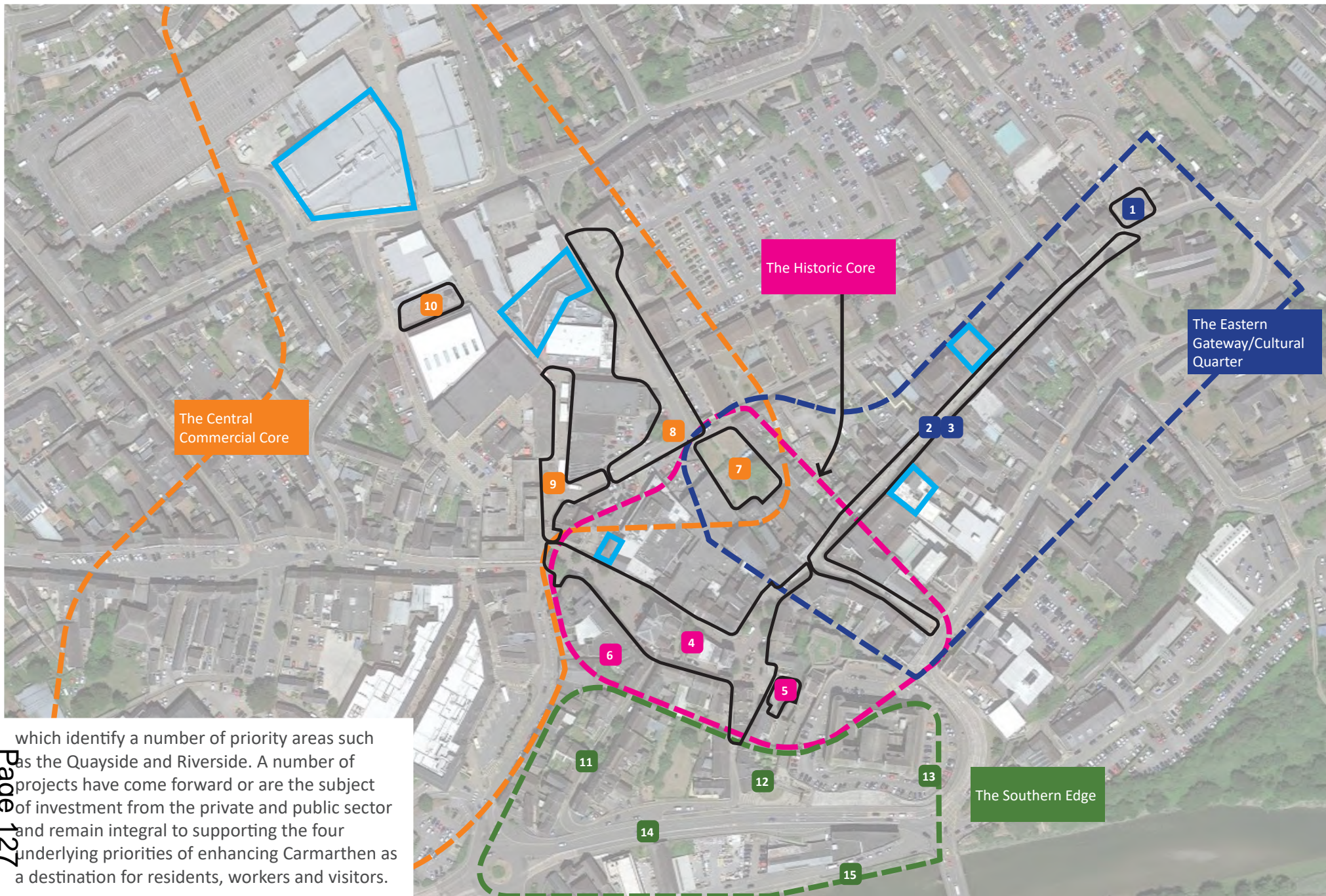
An area for safeguarding the core commercial activity focused on retail, leisure and hospitality, including the shopping centre anchors of Merlin's Walk and St Catherine's Walk together with other existing footfall attractors.

The Southern Edge

The area between the historic core and Coracle Way, including County Hall and Quay Street, which provides linkages towards the Quay and riverside. The area offers scope for qualitative enhancement given the 'gateway' location together with areas of transition, especially in Quay Street.

The focus for the masterplan is centred on the core area of the town centre given the priority objective in the short term to protect and strengthen the appeal and offer of the traditional town centre.

Despite this geographic prioritisation, it remains supportive and complementary to the wider objectives and aspirations identified in the 2014 Carmarthen Town Regeneration Masterplan



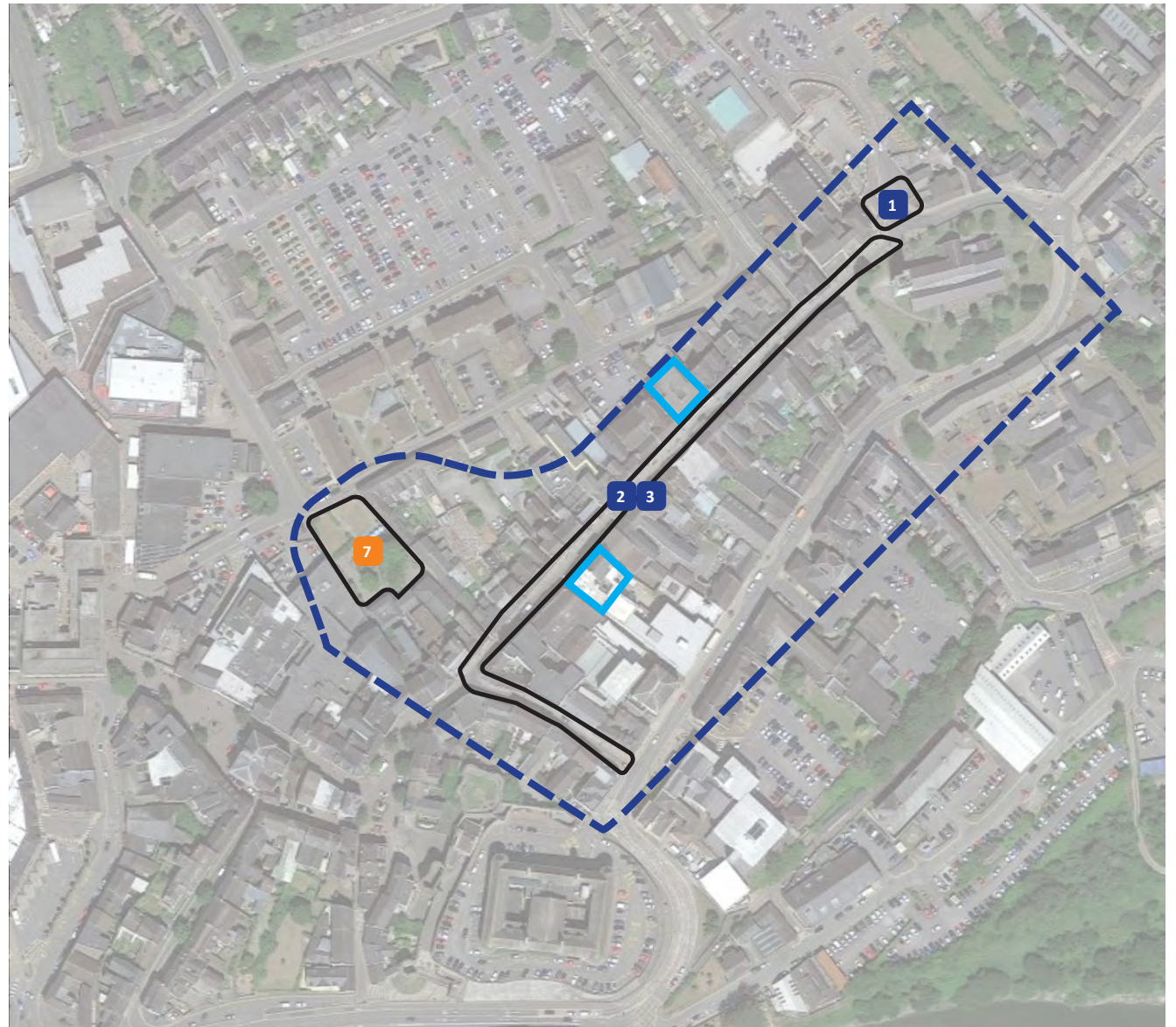
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which identify a number of priority areas such as the Quayside and Riverside. A number of projects have come forward or are the subject of investment from the private and public sector and remain integral to supporting the four underlying priorities of enhancing Carmarthen as a destination for residents, workers and visitors.

The Eastern Gateway/Cultural Quarter

Strategic objective:

The strategy is focused on rejuvenating activity, the public realm & built environment, and the range of uses in the heart of the Old Town Quarter, building on the existing heritage and cultural assets such as Peter's Church, Oriol Myrddin, library (housing Carmarthenshire Archives) and Lyric Theatre alongside the independent business community. The temporary pedestrianisation of King Street offer opportunities to investigate longer term changes to encourage street-based activities and improved public realm alongside support for a wider mix of uses, to build on the independent culture of the area alongside scope for new footfall attractors, including the potential for educational related uses, especially a creative industries hub and student residential, linked to the University. A number of prominent vacant buildings exist, especially on King Street (Post Office, Former Family Value unit) which offer large scale opportunities for reuse to improve the qualitative appearance of the area. The area represents the 'independent, cultural quarter' of the town centre and offers good opportunity for building on and expanding the variety of uses to extend economic activity, particularly into the evening, and promoting an artisan village.



Project 1: St Peter's Street Car Park Entrance

Objective

The car park entrance currently detracts from the high quality and historic character of the area and creates a negative first impression.

A scheme comprising proposals for extended footways, natural stone finishes, new barriers, signage, and trees/ornamental planting will help to enhance this point of arrival and complement the character of the area.

Tasks

1. Liaison with the Highways team to agree scope and parameters for design i.e. is a reconfiguration of the highway and access arrangements required? Are other environmental improvements required in the wider car park?
2. Preparation of a brief for the design of an environmental enhancement scheme (Approximately RIBA Stage 4). The study should include:

- Technical highways design as necessary
 - Public realm proposals including paving, planting, boundary walls seating signage, lighting, de-cluttering
 - Review of any existing TROs
 - 'Access for all' appraisal
 - A palette of materials, street furniture and lighting that is coordinated with existing public realm treatment in vicinity of St Peters Church
 - Stakeholder engagement
 - Cost appraisal, risk assessment, delivery timescale
3. In support of the feasibility study, undertake or commission the following:
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in the area
 - Assessment of funding opportunities



Project 2: King Street/Queen Street Access Improvements

Objective

Kings Street and Queen Street have previously been identified for potential pedestrianisation, and the temporary measures in place to allow for social distancing due to COVID-19, have allowed a preliminary assessment of its effect.

Potential advantages of pedestrianisation include a safer and more pedestrian friendly environment, increased space for external seating, dining and the on-street presentation of wares, space for market stalls to increase footfall. There appears to be few disadvantages as the route is not a strategic through route and does not provide significant on-street parking.

On this basis, the potential for pedestrianisation together with other approaches to managing access to the street, should be further explored taking into consideration access and timing of deliveries; shared surface treatments and the possibility of closure to traffic being limited to seasons.

Any comprehensive redesign should include for the implementation of high-quality materials (including natural stone) and a consistent approach to street furniture to enhance the areas identity.

Tasks

Liaison with the Highways team to agree scope and parameters for the feasibility study.

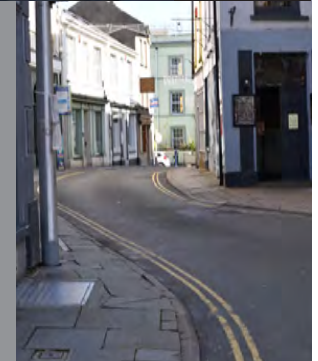
Preparation of a brief for a feasibility and options study to explore the range of approaches to improving pedestrian

accessibility (Approximately RIBA Stage 3). The study should include:

- Options and assessment of a variety of design approaches including pedestrianisation, reduced carriageway widths, shared-surfacing, reduced / controlled access for different vehicle users, reduced / no parking, etc.
 - Appraisal of wider network implications and review of existing TROs
 - Opportunities for outside seating, display areas for businesses, market stalls and review pavement licensing arrangements
 - Street furniture and signage audit and proposals for the de-cluttering
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting that is coordinated with future proposals for the town centre
 - Strategy for stakeholder/ public engagement
 - Cost appraisal; Risk assessment; Delivery timescale
3. In support of the feasibility study, undertake or commission the following:
- Topographical survey
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers
 - Assessment of funding opportunities



A redesign of the street environment would create a more attractive and usable space that is welcoming to pedestrians and would create opportunities for street stalls, tables and chairs and events. Vehicular access can be managed to allow deliveries and emergency services in a shared street.



Project 3: Cultural Quarter Enhancement

Objective

The idea of a 'Cultural Quarter' based on existing heritage, cultural and educational assets such as St Peters Church, Oriol Myrddin, library (housing Carmarthenshire Archives) and the Lyric Theatre alongside the independent business community, has grown momentum in recent years.

This strategy seeks to consolidate this idea through a wide range of localised and focused improvements which improve the fabric and character of this part of the town and encourage and expand economic, cultural and educational activity.

Tasks

1. Liaise with building and business owners to enhance the appearance and maintenance of shop-fronts and key buildings such as the Art Deco King Street Furnishers, the Post Office, and the portico entrance to the Lyric Theatre.
2. Sundry improvements to the public realm and streetscape including the implementation of consistent bollards and furniture, seating, hanging baskets, seasonal flags, and banners. This is considered an interim measure ahead of long-term public realm improvements.
- Review the function and appearance of the bike shelter adjacent to the Oriol Myrddin Gallery and consider new cycle infrastructure such as e-bikes, to promote use by students and visitors.

4. Review pavement licence provision and conditions to promote greater use of the external space, al-fresco dining, the evening and night-time economy, and independent traders.
5. Identify suitable locations for market stalls during the temporary access restrictions in King Street and Queen Street and monitor their impact on footfall and local businesses, in consideration of the business case for pedestrianisation.
6. Investigate alternative reuse of prominent vacant properties – including potentially University uses such as student residential, education hub, creative/digital industries.
7. Investigate opportunities for a hotel.
8. Commission artwork to signal the entrance to Jackson's Lane off King Street.
9. Assess the potential value of branding and promoting the area as a distinct 'quarter' and destination within the town centre.



The Historic Core

Strategic objective:

The heritage asset of the town centre, the area centred on Nott Square, Guildhall Square and the Castle provides the transition between the independent & cultural quarter, and the modern shopping centre. The focus of the strategy is on qualitative improvement and enhancement of the existing distinctive, unique built environment and assets alongside more proactive use of this area, by building on existing initiatives and providing the appropriate physical infrastructure and conditions to support greater public use (safe, weather protected) of the outdoor spaces, to accommodate food/drink/hospitality and entertainment/street activities. This is an immediate priority to help extend economic activity of the day and season and respond to social distancing requirements.



Project 4: Guildhall Square & Nott Square

Objective

Guildhall Square, Nott Square and the routes that connect them, represent the historic core of the town centre and a key asset and visitor attraction.

The quality of public realm in these areas does not match the quality or character of its setting and improvements are considered a priority.

In the short term, it is understood that some cosmetic improvements to these key spaces are currently being implemented by the 'Public Realm Group'. In the medium term however, a comprehensive replacement of paving and furniture is required to realise the full potential of this important area.

Note that some of the tasks itemised below may already be underway through the work of the 'Public Realm Group'.

Tasks

1. Consider providing consultant support to the 'Public Realm Group', to audit these key areas in terms of short term improvements.
2. De-cluttering of the space and the implementation of consistent furniture, seating, signage etc.
3. Review pavement licence provision and conditions to promote greater use of the external space, al-fresco dining, the evening and night-time economy, and independent traders.

4. Allocate space to the central parts of the squares for market stalls, street-food stalls and/or covered staging for outside dining areas that are usable during inclement weather and early/late season, etc.). Infrastructure could possibly include power, security, furniture and lighting. Space should take into consideration permitted vehicle routes, deliveries, and emergency access.
5. Licensing and locations for street performance should also be investigated.
6. Celebrate the heritage of the town and its spaces with seasonal flags and banners and decorate with hanging baskets and seasonal lighting.
7. Prepare a brief for the design of a public realm scheme (Approximately RIBA Stage 4). The study should include:
 - Public realm proposals including paving, planting, seating, signage, lighting, de-cluttering
 - Review of any existing TROs
 - 'Access for all' appraisal
 - A palette of materials, street furniture and lighting that is coordinated with a town wide strategy including the replacement of the existing concrete paving with natural stone and furniture with consistent town centre style appropriate to its important historic setting

- Stakeholder engagement
 - Cost appraisal, risk assessment, delivery timescale
8. In support of the feasibility study, undertake or commission the following:
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in street
 - Assessment of funding opportunities



Project 5: Castle Entrance

Objective

In association with Guildhall Square and Nott Square, the Castle is a highly valued asset and important visitor attraction. Currently its entrance is severely compromised by clutter and the appearance of adjacent buildings. The environmental enhancement of this area should be a priority.

As with Guildhall Square and Nott Square, the 'Public Realm Group' have identified and are implementing opportunities to improve appearance and accessibility and have successfully introduced an outdoor seating initiative in response to the Covid-19 pandemic. In the medium, a comprehensive redesign of this area should be coordinated with the adjacent Nott Square.

Tasks

1. Consider providing consultant support to the 'Public Realm Group', to audit these key areas in terms of short term improvements.
2. De-clutter the castle entrance space by removing all the street furniture located between the castle and Nott Square.
3. Investigate options to improve the boundary treatment to the northern edge of the castle entrance space and its interface to adjacent buildings. This could include temporary stalls in the short term and a permanent new high stone wall with interpretation and market stalls in the long term. It is understood that a mural to the blank gable wall is currently being considered.
4. Investigate ideas for flags, banners, and a theatrical lighting scheme to enliven the space and reinforce its presence in the town.
5. A medium-term aspiration should be to redesign of the castle entrance space to create usable, level, gathering / performance area. This exercise should be incorporated into a wider scheme for public realm improvements to Nott Square and Guildhall Square.



Project 6: The Lanes

Objective

The numerous alleyways in the town centre are an interesting and distinctive feature of the town's history and morphology however, many are not well maintained and consequently not inviting to pedestrians.

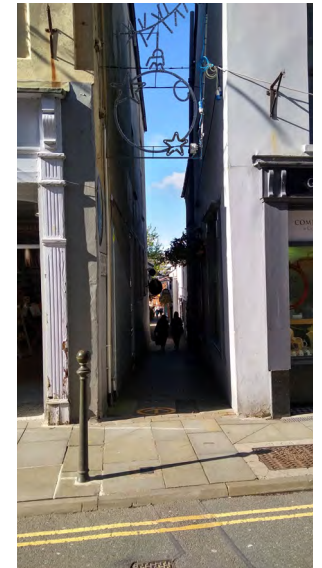
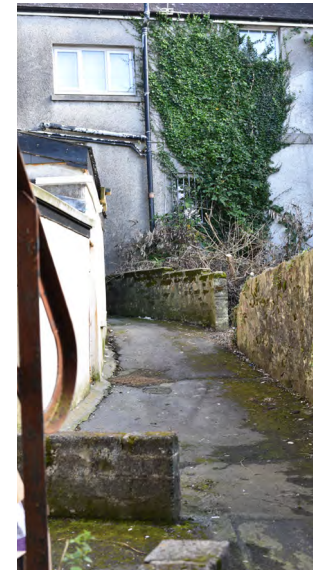
A project to work with building and business owners adjacent to the lanes, to clean, repair, resurface, light, and signpost these routes, will encourage visitors to use them to explore the town.

Tasks

1. Prepare a brief for an audit of the lanes. The audit should include:
 - Mapping and measuring of the lanes.
 - Assessment of the condition of surface materials, levels and accessibility issues.
 - Assessment of boundary treatment including surface finish, condition and ownership.
 - Assessment of lighting
 - Recommendations for improvements including potential constraints, high level costs, and potential programme of implementation
 - Scoping of potential for further project to implement a series of public art projects to reinforce and communicate the culture and heritage of the town and provide additional places of interest and connectivity.



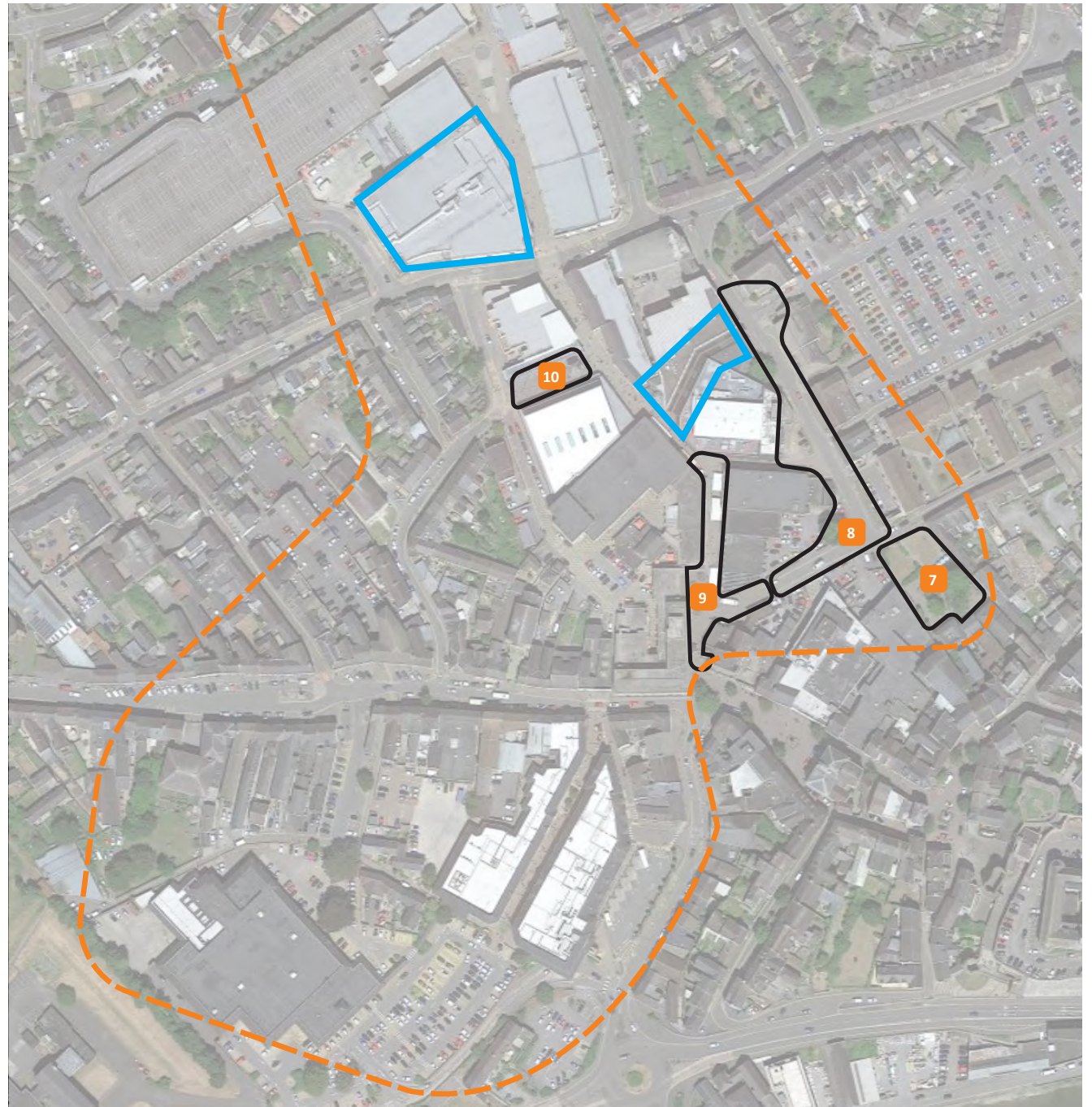
Public realm improvements to the market square at Caernarfon Castle (below) have created a simple, uncluttered space surfaced with natural stone, which allows space events, tables and chairs, etc.



The Central Commercial Core

Strategic objective:

An area which traditionally has been driven by the commercial retail market, the core is facing significant challenges and threats particularly to its retail offer, following the loss of key attractors including Debenhams. The strategy is focused on safeguarding the core retail, leisure and hospitality offer which contains a number of key anchors including Merlin's Walk and St Catherine's Walk and other individual attractors. There are a number of large vacant units which offer opportunities for new uses, including potential facilities for public sector partners to drive activity and footfall but also supporting a broadening of uses. Opportunities for improvements to the public realm, especially in Red Street exist whilst the strategy seeks to support the expansion of the outdoor market and ensure a holistic linkage with private sector aspirations and activity.



Project 7: Jacksons Lane Gardens

Objective

Jackson's Lane is a committed project priority for the town centre and work is already underway to review earlier plans for the area.

The Recovery Masterplan has identified the area as a key asset to the town centre in providing green open space and a valuable alternative experience for visitors, in contrast to the town's numerous hard paved public spaces. It also provides opportunities for existing and new businesses to exploit and so it is recommended that this area is enhanced in terms of its appearance, accessibility, and its potential for accommodating moderate commercial activities and events.

The character of the enhancements should retain the intimate, verdant and 'gardenesque' character that the space currently provides. The inclusion of increased enclosure to screen views (e.g. bin storage areas) and extend the protected environment is also considered to be desirable. It is understood that a separate green/blue infrastructure project has been identified which should ideally be incorporated into future proposals without compromising the other primary objectives.

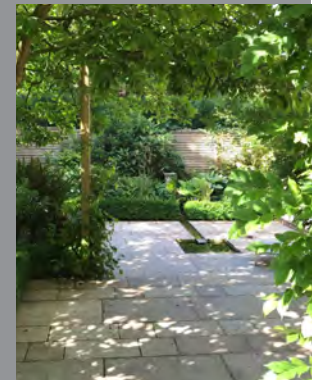
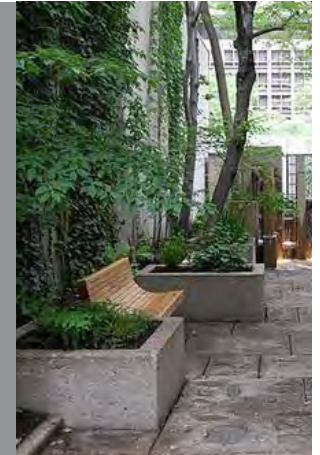
Depending on overall cost and available funds, this Project could be developed in conjunction with Project 8: Chapel Street, Cambrian Place, John Street.

Tasks

1. Short term improvements scheme to include repairs and adjustments to the paths and walls, tree maintenance, ornamental planting, and the laying of turf to be implemented for summer 2021.
2. Review of current licences should be granted for businesses to utilise the outside space and erect covered areas and opportunities for pop-up stalls, etc. should be pursued.
3. Preparation of a brief for the comprehensive redesign of the space from concept options to full technical design of the preferred scheme (Approximately RIBA Stage 4). The brief may require some preliminary scoping, consultation and high-level design concepts to provide a clear direction for the detailed stages.
4. The study should include:
 - Developed concept options expressed in 3D through to full technical design ready for construction
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting potentially unique to the gardens.
 - Strategy for stakeholder/ public engagement
 - Cost appraisal; Risk assessment; Delivery timescale
5. In support of the feasibility study, undertake or commission the following:
 - Topographical survey
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers
 - Assessment of funding opportunities

The current form of Jackson's Lane provides a tranquil space at the heart of the town, and an attractive alternative destination in comparison to the nearby Nott and Guildhall Square.

Retaining this green and secluded character will provide will a variety of experiences which will appeal to a wide range of visitors.



Project 8: Chapel Street, Cambrian Place, John Street

Objective

This grouping of streets does not provide any significant retail frontage and is dominated by delivery yards and the rears of buildings. However, this area sits between the primary destinations of Queen Street and Red Street and as such, provide important and well used connecting routes for pedestrians.

These streets are generally of poor townscape quality and significantly detract from the otherwise high quality urban environment of the town centre.

Environmental improvements should be implemented to create an attractive, safe and usable streetscape including improved boundaries, active frontages, and an improved street space.

It is understood that elements of this area may be improved by the proposals for Jackson's Lane.

Tasks

1. The scoping of the Jacksons Lane project should include these areas to understand what could be achieved within the budget limitations without compromising the aspirations for the Jacksons Lane project.

When the available budget is identified then the scope of the environmental enhancement project for Chapel Street and potentially Cambrian Place and John Street can be established.

3. Prepare a brief (or extend the Jackson's Lane brief) to include concept options to full technical design of streetscape improvements (Approximately RIBA Stage 4). The study should include:

- Developed concept options expressed in 3D through to full technical design ready for construction - including surfaces, walls, planting, pop-up power supplies, signage.
- 'Access for all' appraisal of options
- A palette of materials, street furniture consistent with the wider public realm improvements in the town centre.
- Strategy for stakeholder/ public engagement
- Cost appraisal; Risk assessment; Delivery timescale

4. In support of the feasibility study, undertake or commission the following:

- Topographical survey
- Utilities, basement and radar surveys
- Liaison with statutory undertakers
- Assessment of funding opportunities



The town's historic Market gates are currently held in storage and could be incorporated into the proposals for Chapel Street / Jacksons Lane.

Project 9: Red Street

Objective

The public realm in Red Street should be redesigned in coordination with improvements proposed for Guildhall Square and Nott Square, to significantly enhance its appearance and create more usable space.

The style and appearance should match or complement the materials and furniture used for the pedestrian shopping areas to the north to reinforce the identity of the commercial core and positively contrast with the adjacent historic areas.

Tasks

1. In the short-term, the potential for various enhancements including de-cluttering, cleaning the existing paving, removal of the circular planters and seating, should be considered.
2. Liaise with the owners of the developments fronting Red Street with regard to cleaning and repairing the building elevations fronting the street especially at first floor level to the western side of the street.
3. Identify additional dedicated space for market stalls and pop-up power supplies.

Undertake a preliminary scoping for the renewal of the public realm. Although this is considered less of a priority compared to Nott Square and Guildhall Square, the preliminary designs could be carried out at the same time but delivered at a later date.

5. Prepare a brief (or extend the Nott Square / Guildhall Square brief) to include concept options for streetscape improvements (Approximately RIBA Stage 2/3). The study should include:
 - Developed concept options expressed in 3D for paving, planting, furniture, de-cluttering, etc.
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture consistent with the wider public realm improvements in the town centre.
 - Strategy for stakeholder/ public engagement
 - High-level cost appraisal; Risk assessment; Delivery timescale



Project 10: Market Precinct

Objective

Market Precinct provides space in an otherwise constricted part of the town centre however, it is under-utilised and would benefit from minor maintenance and public realm improvements.

Tasks

1. The existing paving should be repaired and cleaned.
2. Permanent improvements should include:
 - Better use of the space including dedicated areas for market stalls, street food, table and chairs
 - Pop-up power supplies
 - New street furniture to coordinate with a town-wide public realm strategy
 - Lighting scheme to create ambient light effect



The Southern Edge

Strategic objective:

A relatively compact and mixed area, which represents a historic linkage from the heritage core to a main gateway and the riverside. Quay Street is transitioning from an office location (mainly to residential) although challenges remain whilst the wider environment, including around County Hall offers scope for qualitative improvements. Recognising the importance of the riverside (viewed beyond the short term), an enhancement of safe and attractive links is considered important for encouraging greater access to the waterfront.



Project 11: Quay Street

Objective / Tasks

A refresh and encouragement of increased occupancy in this attractive street linking the town centre with the riverside.

1. Liaise with building and business owners to enhance the appearance and maintenance of buildings.
2. Sundry improvements to the public realm and streetscape including the implementation of consistent bollards and furniture, with a longer-term aspiration for repaving.

12. Castle Wall overlooking Coracle Way

Objective / Tasks

Minor repairs and enhancement to better present the historic walls as a defining feature on approach to the town centre.

1. The areas adjacent to the remnant castle walls require various environmental improvements including repainting (or artworks) to the adjacent gable walls, a lighting scheme to the castle wall, repair and repainting of the metal railings and improved access/ way-finding for routes to the river.

13. County Hall

Objective / Tasks

The stone-faced retaining wall to the southern side of County Hall should be cleaned and the installation of a lighting scheme to walls and building considered, as this area demarcates the edge of the town centre on approach from the south.

1. Obtain quotes for wall cleaning and repair.

14. River Towy Connection

Objective / Tasks

An improved pedestrian connection including road crossings linking the town centre with the riverside should be investigated.

1. Outline feasibility study to identify opportunities to create direct pedestrian connections, considering access for all, way-finding and improved road crossing at Coracle Way.

15. Riverside

Objective / Tasks

Scope and initiate a long-term strategy for the management of flooding events at the riverside to help aspirations to regenerate the area and better connect it with the town centre.

Town Centre Wide Strategies

Objective / Tasks

There are a number of town centre wide initiatives which will directly support and complement the recovery masterplan. In some cases, the objectives and initiatives are identified for delivery by Carmarthen BID as outlined in the four priorities of its Business Plan and form the focus for the Regeneration Forum Sub-Groups.

1. The preparation of a town centre design guide to establish a suite of paving, furniture, signage and lighting should be commissioned to help ensure the coordination of the various public realm schemes identified as part of Recovery Masterplan and to help guide other future projects.
2. Brown tourist signage located on approaches to the town centre, to promote the key attractions.

Property Strategy

A core element of the recovery masterplan is property led and reflects the importance of a property strategy which directly supports and contributes to the objectives of recovery and future town centre opportunities.

The impact of the Covid pandemic has accelerated many structural trends which have increasingly shaped the high street over recent years. This is most evident in the shifting composition and use of town centres, especially change in the retail sector and to a lesser extent office market. At the local level this has led to an increase in vacant units in Carmarthen town centre especially in the Old Town Quarter (e.g. King Street, Queen Street), Quay Street and the commercial core including Red Street, Cambrian Way and larger voids in St Catherine's Walk.

The pressures and closures facing national multiple retailers has major implications for the town centre given its focus for many national operators that has resulted in the loss of a number of key attractors, primarily mid-fashion clothing and footwear retailers. This presents major challenges for securing new and viable reoccupation reflecting the large size of units involved and declining retail demand.

The physical oversupply of retail units emphasise the importance of securing alternative uses which will help to broaden the range of activities and offer extended 'dwell time' and expand the reasons to visit the town centre throughout the day and evening for

residents, workers and visitors. The strengthening of the town centre evening economy and associated activity forms an integral element of the recovery masterplan.

Whilst a core objective of the masterplan seeks to safeguard the town centre's regional role for retail, leisure and employment, it also seeks to encourage and promote new uses with attention on vacant and underutilised premises. This priority should focus on the primary shopping streets which have lost, and are likely to continue to lose, national multiples. It seeks to encourage a wider mix of uses including flexible workspace, residential, hotel, leisure, education and community use, including the re-purposing of property. This will require engagement with property owners, investors, the development industry and prospective occupiers. There will also be 'areas of opportunity' which offer scope for improvements to existing property together with some sites which represent more comprehensive development opportunities in the longer term, such as Cambrian Way.

The confirmed closure of Debenhams department store will be a significant loss for Carmarthen town centre, particularly where the realistic prospects for reoccupation of a large, prominent unit by a single occupier is challenging. An innovative approach will be required and will likely necessitate public sector intervention to maximise the potential for alternative use(s). There are other large buildings on King Street (for example, former Post Office and

former Family Value unit) which also offer potential for a mix of uses including residential, hotel and workspace.

The strong public sector presence in Carmarthen presents good opportunities to investigate, develop and grow public sector work hubs from large vacant town centre premises. This would help generate new footfall including scope for co-location and collaboration via shared workspace/offices. The potential by Carmarthenshire CC to deliver a Hwb facility (currently absent in the town centre but an ambition) and possibly leisure activities (such as a 24/7 fitness suite and play facilities subject to further investigation) reflects the types of activity that could be provided. Other key local partners including Hywel Dda Heath Board (in the process of reviewing its property estate related to non-clinical and primary care services), University of Wales Trinity St David and Coleg Sir Gar could also operate community health and education services from town centre premises. The main issue is the strong potential that exists to drive more social and community activity by the public sector (alongside third sector partners) given the availability of large vacant units to accommodate these uses.

Project 1: Local Market Insight

Objective

In order to investigate and encourage realistic opportunities for new town centre uses, particularly through the reuse/re-purposing of vacant and underutilised premises, a property strategy requires market knowledge and proactive engagement with property owners/landlords/investors and commercial property agents active in the town centre. This masterplan has involved detailed discussion with local property owners, particularly the shopping centre owners and local agents, which is considered essential to manage change and ensure early understanding of ownership intentions and aspirations, and market/occupier requirements. Ongoing dialogue will be required and actions will need to align closely with the business support strategy which seeks to encourage new business activities, including the role of property in supporting a range of innovative and flexible accommodation and commercial terms/conditions for occupiers. This objective will:

- Investigate and identify key property assets that represent suitable, realistic opportunities for new uses beyond retail;
- Encourage property owners, investors and developers to consider alternative uses and re-purposing of assets that deliver economic and community value and drive town centre investment;
- Build and promote investor confidence in the town centre with support for a wider mix of uses and encouragement of modern and flexible uses;
- Encourage more flexible and innovative commercial terms/conditions for prospective occupiers especially independents to maximise affordability and de-risk exposure for landlords.

Benefits

- Reduced vacant property rates
- Increased investor confidence
- Increased level of property improvements and refurbishments that supports local demand
- Broader range of town centre uses including residential
- Greater flexibility that encourages enterprise and business growth

Tasks

1. Undertake regular audit and monitoring of vacant premises in the town centre to identify key landowners and investors and establish where possible owner intentions.
2. Liaise with the development industry where known requirements exist, with priority to direct new investment to the town centre.
3. Investigate potential to establish a Property Owners/Investors/Commercial Agents Forum on a regular basis to monitor property issues, identify actions/opportunities for the town centre and investigate incentives to support and encourage take up of vacant properties. In addition, maintain dialogue with key town centre property owners e.g. shopping centres to manage risk and structural change relevant to their assets.

Project 2: Local Development Order

Objective

Proposals are being examined for a Carmarthen town centre Local Development Order (LDO), a planning policy tool that promotes greater flexibility and opportunity for a wider range and mix of uses in the town centre. If approved, it is important this is promoted to property owners and commercial agents to communicate the benefits of the LDO particularly at a time of major change in the property market.

Benefits

- Greater flexibility for the property market
- Directing investment towards town centre priority areas
- Increasing the viability of building improvements and mixed uses

Tasks

1. Publicise and actively promote the advantages of the Local Development Order (LDO) to property owners/landlords/developers and local commercial agents to encourage opportunities for greater flexibility of uses and re-purposing of assets, including signposting of relevant Council support initiatives where appropriate.

2. If necessary, monitor and review the LDO boundary to ensure it reflects the need for a smaller town centre and to maintain a concentration of investment in the core commercial areas.
3. Promote the opportunities for residential uses in the town centre particularly in supporting more viable development. This could include opportunities to partner with Carmarthenshire CC Housing Services to deliver increased levels of affordable properties to rent.

Project 3: Funding Support

Objectives

There are key town centre properties which contribute to the objectives of the recovery masterplan and the wider health of the town centre, but which are likely to require a targeted regeneration investment through public sector intervention given the scale, significance and potential complexity of the properties. It will be crucial to ensure these key properties, whether vacant or subject to a change in circumstances, are brought back into beneficial use given their prospects to accommodate, potentially via re-purposing, new activities and uses which can act as anchors and footfall attractors and deliver new investment. The opportunity also exists to target properties in need of qualitative improvement to improve the quality of the built environment.

Benefits

- Intervening in property to deliver objectives for targeted priority areas
- Increasing the viability of building improvements and mixed uses
- Increasing investor confidence and encouraging the private sector to invest

Task

1. Establish a target list of strategic acquisitions that can draw down funding from the Welsh Government Transforming Towns Programme, which is available for key properties in the town centre.
2. Identify and establish key target properties in town centres and keep under regular review (which align with market knowledge from Project 1 Local Market Insight and Project 4 Public Sector Land and Assets).
3. Identify a target list of properties identified as in need of qualitative improvement and prioritisation of actions, including potential support for refurbishment and fit out.

Project 4: Public Sector Land and Assets

Objectives

The role of public sector land and assets offer opportunities to investigate greater co-location and public sector asset collaboration in town centre locations. The objectives of the Transforming Towns Programme and emphasis on Town Centre First clearly support this objective, particularly given the strong presence of the public sector locally and the scope to investigate new service delivery and activities from town centre premises. This approach would contribute to major footfall generators alongside enhanced community access for services and contribute to a mixed-use destination.

This is of particular relevance to Carmarthen given its administrative role as the county town and the extent of the public sector in the wider town. Opportunities exist for Carmarthenshire CC, Hywel Dda Heath Board, University of Wales Trinity St David (such as its initial ideas for an enhanced town centre presence) and Coleg Sir Gar to investigate greater service provision and delivery from town centre premises, including the potential for shared collaborative space. It will also provide opportunities for third sector organisations and offers a realistic prospect for beneficial reuse of large vacant premises where commercial demand is likely to be limited.

Benefits

- Co-location of services and office space
- Retain town centre office footfall and spend

Task

- Proactively working with its public sector partners, including Ystadau Cymru, Carmarthenshire CC will investigate and encourage opportunities for more focused use of town centre locations by the public sector, including the Council's own services together with Hywel Dda Heath Board, University of Wales Trinity St David and Coleg Sir Gar and other relevant organisations.



Project 5: Reform of business rates

Objective

The liability of business rates represents a barrier for many town centre businesses especially independents looking to grow into larger premises, but equally has cost implications for property owners when vacant and considering adaptation. The year-long business rates holiday granted for most Retail, Leisure and Hospitality businesses during 2021/22 as a part of Covid-19 economic support provides a welcome breathing space and encouragement for business to grow whilst a review of longer-term measures should be supported alongside initiatives to encourage business growth.

Benefits

- Property related business costs that support and encourage small business growth.

Task

- To champion changes to the business rates relief and overall taxation model that support the small and independent business to grow in town centre locations.
- Encourage property owners to investigate the adaption of town centre property which offer the greatest business rates efficiency, including innovative approaches to minimise empty rates liability which can be a major barrier to intervention.

Business Support Strategy

A core element of recovery and growth of Carmarthen town centre is the need to safeguard existing businesses alongside support and encouragement for local and independent business growth through a business strategy.

The strategy is to develop greater business resilience and confidence together with an expanded range of new businesses with potential to attract and drive higher footfall. The aim is also to stimulate wider economic benefits for the business community through increased productivity, higher wages and job creation. This can be achieved through a targeted multi-agency approach and the encouragement of the transition from meanwhile use and market trader through to a business located on the main high street.

It is recognised that technology will help to build the town centre of tomorrow and there is the need to focus on supporting the digital health of the local business community whilst installing SMART technology to maximise the benefits of innovation and information. Improved digital infrastructure with associated skills will provide town centre businesses with the ability and confidence to fully exploit technology to improve business performance.

Project 1: Entrepreneurship and Business Support

Objective

Carmarthen town centre is characterised by its diversity of independent businesses, and many specialists that contribute to the wide range and choice on offer. They complement the national multiple retailers, increasingly a weakening presence in the town centre which threatens the town's regional role.

To maintain and strengthen the centre's shopping role, it is important to support the growth of independent businesses and maximise opportunities for new local enterprise. The masterplan has identified examples of recent independent business growth, including the take up of large units in the main shopping centres by prominent local businesses. This is a positive indicator of confidence in the central core and offers good prospects for reuse of vacant units where national retailer demand is more limited. It also reflects the realistic prospects that exist throughout the centre for small businesses, ranging from the indoor (and outdoor) market to more traditional areas such as the Old Town Quarter to scale up. Overall, this closely aligns with the property strategy and is primarily concerned with ensuring the creation of a 'pipeline' of business occupiers across a range of sectors that adds diversity and attraction to the town centre.

In summary, the business support strategy serves several purposes which seek to:

- Establish a place-based approach to business support which reflects the needs and opportunities specific to the town centre
- Encourage new businesses with potential to occupy a range of spaces - meanwhile spaces, market stalls or traditional commercial property
- Inspire micro-businesses to transition into larger premises thereby supporting active take up of town centre accommodation
- Support businesses to become more competitive with greater potential for attracting footfall, raising productivity and employment creation
- Stimulate local demand in support of public and private sector investment e.g., strategic property acquisitions, creation of business incubation space, shared work hubs and investment in reconfiguring and re-purposing property to match new requirements

Benefits

- Increase business enquiries supported with advice and mentoring
- Increased number of businesses and jobs safeguarded
- Increased number of new businesses
- Increased rate of micro/small business growth
- Creation of tailored support packages to encourage investment in key sectors
- Decreased levels of vacant property

Tasks

1. With several agencies providing support to businesses of various sizes and operating across a broad range of sectors, the delivery of business support at a place-based level requires a coordinated and targeted approach.
2. Bring all aspects of business support into one place (either virtual and/or as part of a new town centre Hwb facility), making it clear and simple for local businesses to access and find the help they need. The role of the Carmarthenshire CC Economic Development team is helping to simplify for entrepreneurs and businesses a complex picture of entrepreneurship and business support products and ensuring coordinated multi-agency delivery. Partners include the Council, Business Wales, Federation of Small Businesses, South Wales Chamber, Centre for Business and Social Action, Mentrau Iaith, University of Wales Trinity Saint David, Coleg Sir Gar, etc.

3. Promote and communicate at a town level the range of support available and target entrepreneurs and businesses via schools and colleges, businesses groups and organisations and targeting existing town centre traders.

Provide access to a helpline, website, and one-to-one sector-focused support, provide free support and guidance at any stage of the business life-cycle including Starting a business; Growing a business; Developing skills; Networking; Finding finance; Finding a property

Project 2: Digital Town Centre & Skills

Objectives

Given the pressure on the High Street and the impact of COVID-19, it's important that businesses can exploit digital technology, in the same way as supermarkets and shopping centres have done for years. This provides businesses with the opportunity to grow their market and increase turnover locally and globally whilst remaining rooted in the town centre.

The digital health of Carmarthen has demonstrated that just 30% of town centre business are active on social media where the majority of consumers 'hang-out' and can be influenced. Digital health is also influenced by the availability of new technology that exists and is already being used in Welsh towns to help business and places make informed decisions and plan for the future. The objective is to invest in infrastructure in support of creating a SMART town with businesses encouraged to make the best use of digital to grow their business. This includes:

- Putting in place ultra-fast, ultra-reliable connectivity and innovation networks;
- Providing the support, training and encouragement network that helps to create a digital culture and enhanced business skills.

Benefits

- Increased levels of town centre business active on social media

- Increased digital competency levels, qualifications and use of digital technologies
- Increased incidents of business collaboration using social media & technology

Tasks

1. Carmarthenshire CC as lead authority for the Digital Infrastructure Programme of the Swansea Bay City Deal will work to ensure ultra-fast, ultra-reliable digital infrastructure and connectivity is available for the town to include but not limited to full-fibre gigabit-capable broadband, 4G/5G mobile, and Internet of Things (IoT) innovation networks.
2. Continue to build the Carmarthenshire Innovation Network, an 'Internet of Things' network for businesses, communities, and partners to exploit the coverage provided in Carmarthen town.
3. As part of the business support package, and alongside initiatives including Super-Fast Business Wales, investigate and target the town centre with a Digital Initiative through a combination of, but not limited to, digital events, awareness, skills and support to thrive and take advantage of the digital opportunities
4. Adopt a social media data and insights tool for the town and its businesses that provide data, expertise, knowledge, training and support to help them to connect with their audience, to analyse what content engages them and measure what's impacting business results.

Place Management Strategy

Town centres are places that attract a diverse mixture of people from the everyday user, creative, entrepreneurial and explorer, and no masterplan can force a lively attractive centre into being, but it can create the conditions that allow that to grow.

A prosperous town centre must be a place where people are safe, well managed and excited to be. As it is no longer possible to guarantee the daytime footfall of shoppers and local workforce, more than ever the town centre must become more stimulating, exciting, community and cultural destinations both during the day and at night to maximise its appeal to local residents and visitors throughout the year.

The importance of place management and promotion is fundamental to achieving this objective and at the local level is led by Carmarthen Business Improvement District (BID). Whilst relatively new, the BID business plan identifies a draft budget of £845k over the next 5 years for a range of initiatives focused on:

- Improving business profitability: bespoke training - collective waste and recycling – loyalty card - mystery shopper;
- Improve profile of the town: improve branding and signage – “warm welcome/croeso cynnes” initiative – BID website and online business directory – high quality events and festivals;

- Improve parking experience – management and charging incentives – loyalty reward – improved signage and information – ‘meet and greet’ scheme;
- Improve look of the town – cleaning and maintenance – utilise empty shops/shop fronts.

This masterplan fully supports the delivery of the BID’s business plan and outlines objectives and ambitions which align with the BID initiatives to improve the profile of the town centre, support local business to flourish and drive footfall, spend, dwell time and repeat visits in the town centre. A number of actions are at early stages of advancement.

On the basis of the nature of the challenges and opportunities related to its regional role, there will be an advantage to secure town centre operations/initiatives support, working alongside the BID, to ensure project coordination and delivery (recommended as a delivery priority).

Project 1: Culture & entertainment

Objective

As the town centre becomes less about shopping and more about the experience, cultural activity and attractions become more important than ever in ensuring vitality. Cultural destinations (arts, heritage, entertainment) with a broad appeal anchored in the centre need to be safeguarded. Carmarthen town centre supports a good range of

cultural and entertainment assets including Oriel Myrddin (funding secured for redevelopment as a national exhibition asset), Lyric Theatre, the soon to open Carmarthenshire Archives (Y Stordy) at the library, and Vue cinema. The opportunity to build the cultural offer already exists including the linkage with the growth of Yr Egin and the University’s proposals for a cultural quarter. Both would have the potential to enhance the evening economy in the town centre with focus on King Street given its relationship with complementary uses.

There is good scope to build on and expand existing events such as River Festival, Winter Wonderland and St David’s Week alongside the promotion of new high- quality events and festival in the town centre. This would maximise its distinctive historic, cultural and Welsh language appeal as the oldest market town in Wales and raise its reputation and profile as a cultural destination.

Benefits

- Build cultural reputation
- Diversifying town centre attractions
- Increased daytime and evening footfall

Tasks

1. Prioritise growing the calendar and coordination of events led by the BID in partnership with local community groups, to enhance existing events and explore opportunities for a new signature event to showcase and promote Carmarthen.

2. Support cultural venues and actively explore the potential for creative business linked to Yr Egin and the university to develop a creative town centre hub.

Project 2: Transport and Movement

Objective

The reliance on private vehicles needs to diminish if we are to meet the challenges of climate change and a fully integrated public transport service connecting rail, bus and cycle hire schemes would allow people to easily connect with and travel into and around the town from surrounding neighbourhoods. The improvement of public transport service frequency to/from the town centre in the evenings is a known constraint which impacts on the evening economy whilst residents and visitors expect central areas to support sustainable forms of transport. Improved services could also encourage greater use of the town centre by university students.

The cycling credentials of Carmarthen are being strengthened following the implementation of a Brompton Bike Hire scheme at the bus station that provides a versatile folding bike scheme to support travel to work, home, and on public transport. In addition, E-bike charging points will also be installed at St Catherine's Walk and King Street/St Peter's car parks as part of a wider network of electric bike improvements. The County Council have also purchased E-Cargo Bikes for town centre businesses to utilise.

Car parking charges has been a concern of town centre businesses and represents a core priority for Carmarthen BID. At present, the County Council has introduced a pilot free parking scheme in its short stay car parks on Tuesdays and Thursdays between 3.30pm and 6pm. Revenue from car parking funds directly support highway improvements and transportation services in support of the town centre.

Benefits

- Increased levels of walking and cycling journeys
- Increased use of active travel for businesses journeys

Tasks

1. Investigate opportunities with local public transport providers to extend bus service frequency in the evenings, initially on a trial basis.
2. Helping local businesses with new local logistics solutions through E-cargo bikes will require a clear strategy to encourage businesses to adopt the bikes as part of their business and to overcome practical barriers including adequate bike storage.
3. Continue to monitor the impact of town centre car parking charges during the period of recovery from Covid-19 and the effectiveness of the free parking initiatives already in place.

Project 3: Town Centre heritage review

Objective

The unique heritage setting and Conservation Area status of large areas of the town centre ensure a distinctive built environment but equally one which requires sensitive investment and use of enforcement powers to ensure the quality of place is safeguarded and enhanced. A review of the Conservation Area would help identify areas of priority, including scope for targeted intervention where necessary. It would also inform the potential for design guides (including the public realm and shop fronts) which would fully support other initiatives outlined in this masterplan, especially the enhancement of high-quality outdoor spaces and improvements to public realm and buildings.

Benefits

- Enhance the quality of place
- Promote investment in the built environment

Tasks

1. Undertake a town centre Conservation Area review to identify areas for action, including the potential for a design guide to inform physical development and build on the recommended projects of the recovery masterplan.

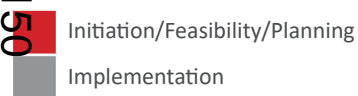
Delivery

Whilst investment in projects funded through programmes continue to make a difference, the masterplan identified that more is required.

The recovery masterplan is for everyone, not just the Carmarthenshire CC, and it will require the commitment and efforts of all stakeholders if the town is to achieve success and deliver continued prosperity for the centre. This new plan is necessary to provide a clear pathway to town centre recovery and growth and it will be focused upon Business, People and Place, providing the framework in which prioritised actions over three levels of importance:

1. Immediate - actioning of quick-win permanent or temporary schemes, to take advantage of potential opportunities arising after the end of lockdown and for the remainder of 2021
2. Short term - delivery within the next 24 months - priority transformational projects that may require planning, funding, approvals and may cause some disruption during delivery
3. Strategic - Significant projects and strategies that will help guide the town centres direction to be resilient and to respond to long term changes

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Place projects

- Project 1: St Peter's Street car park entrance
- Project 2: King Street/Queen Street pedestrianisation
- Project 3: Cultural Quarter enhancement
- Project 4: Guildhall Square and Nott Square
- Project 5: Castle entrance
- Project 6: The Lanes
- Project 7: Jacksons Lane Gardens
- Project 8: Chapel Street, Cambrian Place, John Street
- Project 9: Red Street
- Project 10: Market precinct
- Project 11: Quay Street
- Project 12: Castle Wall
- Project 13: County Hall
- Project 14: River Towy connection
- Project 15: Riverside

Property projects

- Project 1: Local Market Insight
- Project 2: Local Development Order
- Project 3: Funding Support
- Project 4: Public Sector Land and Assets
- Project 5: Reform of business rates

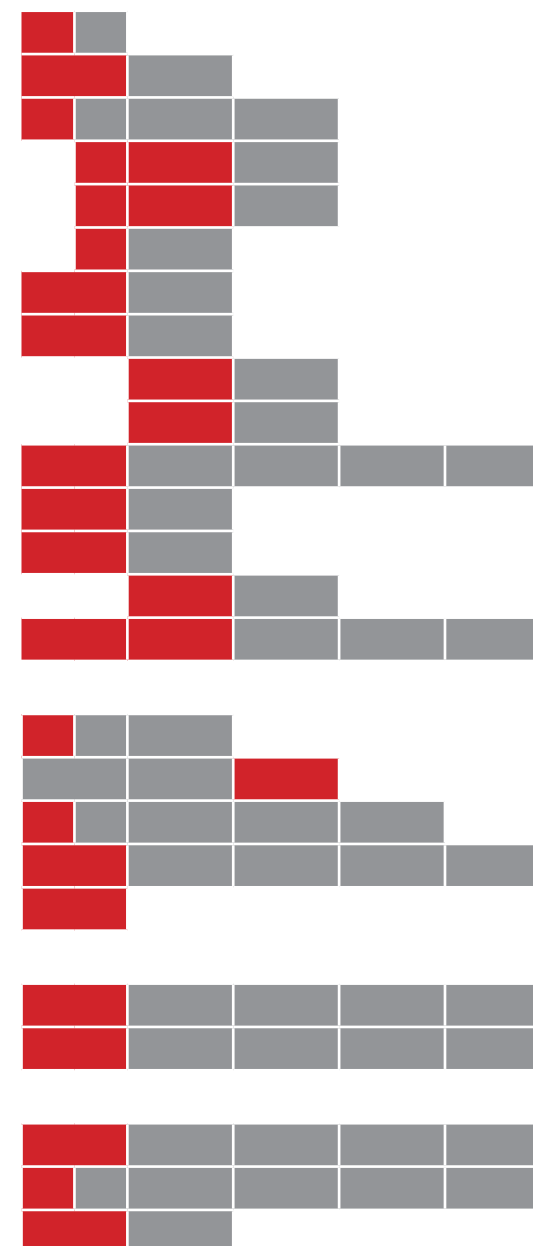
Business projects

- Project 1: Entrepreneurship & Business Support
- Project 2: Digital Town Centre & Skills

Place management projects

- Project 1: Culture and Entertainment
- Project 2: Transport and Movement
- Project 3: Town Centre Heritage Review

Year 1 Year 2 Year 3 Year 4 Year 5+



Priorities

A series of projects are set out by the masterplan, however, it is recognised that it is unlikely that everything can be tackled at once and there will be the need to focus on the most important and high impact projects. All the actions identified support recovery and long term growth. Where more complex but high priority projects are identified, early development of outline business case and design development should be prioritised.

Projects that are anticipated to be funded from existing capital or revenue streams, or through available funding should be a priority.

To help deliver and drive forward the masterplan, the potential exists for funding support to the Local Authority to support a new Town Centre Operations/Initiatives role with strategic oversight to work horizontally across the Council and with other agencies, to broker solutions and drive forward complex initiatives for the recovery of the town centre.

Funding

The funding landscape in Wales is experiencing a period of rapid transformation, this is being led by Welsh Government and the Local Authority in response to the pandemic and the UK Government with responsibility for the replacement funding programs following the UK's departure from the EU. At the time of writing some uncertainty exists around how some funding will be delivered. In light of this, the masterplan needs to be responsive over the coming 12-24 months and aligned to these emerging programs.

Welsh Government – Transforming Towns Programme

Existing Targeted Regeneration Investment (TRI) program comes to an end in 2020/2021 and is replaced by the Transforming Towns Programme. This is a broad and flexible package of support that allows partners to decide upon the most appropriate mix of interventions and how to put them into practice effectively in each town. The new funding package will offer support for a wide range of projects, from green infrastructure developments and the creation of active travel routes to internal and external improvements for business owners, improvement of town centre markets, create new uses for vacant buildings, and drive activity to support the 'digital towns' agenda. Those eligible to apply for funding include local authorities, town centre businesses, Business Improvement Districts and Town and Community Councils.

UK Government

- The UK Government published in March 2021 the prospectus documents on how local areas in Wales will be able to submit bids for the Levelling Up Fund and Shared Prosperity Fund (Community Renewal Fund for 2021-22) as a direct replacement for EU structural funds in Wales.
- Levelling Up Fund – small in scale and geography including regenerating a town centre, local investment in cultural facilities or upgrading local transport infrastructure. Delivered by local authorities who can submit one bid for every MP whose constituency lies wholly within their boundary with preference given to bids from higher priority areas including Carmarthenshire.
- Shared Prosperity Fund – EU Structural Funds will continue until 2023 and replaced through the new UK Shared Prosperity Fund. This new Fund, to be launched in 2022, will operate through the UK Government but to start with the UK Community Renewal Fund being provided for 2021-22 and targets priority local authority areas including Carmarthenshire.

Carmarthenshire County Council

In response to COVID-19, the Council has established underpinning resources to support the recovery and growth of towns and the wider economy. Working with the Welsh Government, a range of new initiatives and business support will be made available.

Business Recovery and Support

Subject to formal approval it is anticipated that the County Council led business recovery and support funding streams will be made available in 2021

- Recovery Fund to safeguard/create sustainable jobs within target growth sectors
- Revenue Support Fund to invest in skills, marketing and diversification to safeguard and grow jobs
- Carmarthenshire Rural Enterprise Fund - development of new and existing business premises
- Transformational Commercial Property Development Fund - to provide financial assistance for the construction of buildings for industrial and commercial use.
- Business Start-Up Fund - capital support for the creation of new businesses resulting directly in the creation of jobs
- Business Growth Fund - support towards capital expenditure projects and specialist revenue expenditure, where new jobs are created

Local Marketing and Distinctiveness

Funding has been secured via the Leader programme to promote rural Carmarthenshire to tourists - led by Carmarthenshire CC Marketing & Media Team to develop stories and reasons to visit, those that amplify

Welsh culture, language, locally produced produce etc. and deliver a marketing action plan including branded promotional material, prepared social media content e.g. text, images and video, a business toolkit.

Empty Premises/Meanwhile Uses

Welsh Government funding to develop a good practice guide for the region enabling communities to develop empty premises into 'meanwhile' spaces or pop up shops, providing practical advice on legal issues, business rates etc. Potential to utilise the £10k Leader funding to fit out empty premises for this purpose.

A Circular Economy - A Sustainable Recovery From Covid-19

The County Council is currently developing a strategy to support local investment in circular businesses and enterprises; that is, enterprises that keep things in use longer, through re-use, repair, re-manufacture and refurbishment, and in doing so, helping regenerate the community by adding jobs and developing skills locally. By promoting this locally, the initiative will not only keep money in circulation within the county but vitally also reduce the impact that Carmarthenshire has on the environment. New potential projects are encouraged with local stakeholders, business owner, entrepreneur, volunteer etc.

The delivery plan indicates time-scales, suggested delivery partners and next steps. In each instance, a detailed review of the project scope would be required and or more detailed design work to provide costings.

The plan includes three stages, short, medium and long term with a suggested level of priority afforded based on stakeholder engagement and the need to complete certain tasks such as data collection to enable the development of key projects.

* Since the publication of the Recovery Masterplan, the Wales Audit Office has published a Regenerating Town Centres Tool Kit for Local Authorities to self assess their approaches and improve their work on town centres. The masterplan has followed the principles of the Tool Kit and Carmarthenshire Council will fully adopt these principles going forward.



Llanelli Town Centre

Recovery Masterplan

Prepared for Carmarthenshire
County Council

October 2021

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1 Purpose & Context

This recovery masterplan has been commissioned for Llanelli town centre by Carmarthenshire County Council (Carmarthenshire CC) in response to the effects of the COVID-19 pandemic. The masterplan reviews existing regeneration activity and provides a fresh focus on the priorities and the strategy for recovery and future growth.

At the current time the long term effects of the COVID-19 crisis are highly uncertain which makes it difficult to draw a clear picture of the future. As we manage and adjust to the pandemic moving forward, there is the need to rethink the shape and purpose of the town centre and how to positively respond to longer term changes.

This recovery masterplan has been prepared with the contributions of local businesses and stakeholders to help steer the immediate actions in support of town centre recovery and to provide the framework to help re-imagine longer term regeneration and growth. Furthermore, at a time when Carmarthenshire as a whole is suffering from the effects of the pandemic, the recovery masterplan aligns with the priorities and actions that will support the Carmarthenshire wide Economic recovery¹.

¹Carmarthenshire Economic Recovery and Delivery Plan, Carmarthenshire Council 2021

Llanelli town centre profile

- A multifunctional town centre with a strong local convenience and community role.
- Businesses and activity are concentrated around Stepney Street, Central Square and Vaughan Street.
- The centre comprises of mainly independent businesses with strong interpersonal relationships and loyalty with their local customers.
- ASDA superstore anchors the town's convenience shopping role alongside a small number of national multiples.
- Llanelli Indoor Market provides a vibrant focus for the town and attracts footfall throughout the week.
- Competition for the town centre derives from regional scale shopping located at Parc Trostre, Parc Pemberton, Swansea and Carmarthen.
- Recent regeneration programmes have focused on physical projects, buildings for commercial use and job creation funded through the Targeted Regeneration Fund (TRI).
- Local wards are amongst some of the most deprived in Carmarthenshire and Wales which is reflected in the levels of prosperity and challenges facing the town centre as a whole.

2 The Impact of COVID-19

The impacts of COVID-19 are huge, unprecedented and continue to cloud the economic outlook. The effects on the town centre have been driven by several inter-related shocks including forced closures, social distancing, accelerated online shopping and structural changes for national multiple retailers.

Whilst impacts have been largely negative, some positive changes have also arisen including strengthened community networks, support for local businesses and 'shop local'. It has also supported growth in business innovation, diversification and created new business opportunities.

The Economic Impact Assessment of COVID-19 on Llanelli town centre² identified the immediate and some potentially longer term impacts that shape this masterplan.

² Llanelli Town Centre – Economic Impact Assessment of COVID-19, December 2020, Owen Davies Consulting Ltd



- £584k – the estimated amount of weekly spending on non-essential retail, services, leisure and hospitality that has been lost during periods of lockdown.
- A 66% decline in footfall at its lowest level in April 2020 compared to a year earlier. By September 2020, footfall remained 25% lower year on year. However footfall levels have recovered at a higher rate compared with the other Primary Towns in the county.
- 18% - the vacancy rate reflecting the loss of national multiples and independents in the last 12 months. Future closures among other national multiples are expected in 2021.
- Impacts on the wider Llanelli economy have been modelled and show reduced productivity, loss of employment with accommodation and food services businesses expected to experience significant closures. Prosperity measured in terms of average household income is lower than average.

Future drivers of change

Post COVID-19 life will likely be different to what many were used to with the pandemic accelerating many pre-existing structural trends as well as people forming new habits. This means people are unlikely to return entirely to the old behaviours. However, there remains uncertainty with how permanent these changes will prove once COVID-19 is no longer a threat and people can return to normal work patterns and socialising. The future drivers of change (Figure 1) are likely to have both positives and negatives effects for businesses and the people that use the town centre.

	Negatives	Positives
National multiple retailers	Loss of footfall as brands that once provided an important customer draw continue to restructure/close	Prime frontage become available for ambitious independents
Office space	New pattern of working from home reduces number and frequency of office workers commuting to the town	Working from home and reduced out-commuting increase opportunity for more localised spending
	Demand for office spaces decline	Opportunity for combined agile office hubs and shared workspace.
Online shopping	Continued growth of online shopping results in long term loss of footfall	Brick & mortar businesses grow trade online to reach new markets & customers
	Retail – require smaller sales areas and different type of space to allow increased storage and back office	Business offering quality, specialist and experience led retail and personal services likely to grow.
Property	Decline in demand for retail and office space results in decline in property value/income for owners/investors	Lower “attractive” rents and more flexible terms encourages independent business start-ups and existing business growth
	Declining viability and willingness to adapt property and invest	Landlords/property owners are incentivised to work in partnership with public sector and play an active role in regeneration
Place & attractiveness	Cautious consumers and ongoing health concerns attracts customers to locations considered safer e.g. retail parks	Opportunity to re-shape public spaces and improve pedestrian environments
	Loss of retail character and dominance of shopping	Space for new and intensified uses – residential, leisure, health, culture. Growth of new customers – e.g., homeworker meetings/ lunchtime hospitality
	Loss of hospitality, culture, leisure businesses that offer ‘experiences’ but have also been hardest hit	Greater emphasis on experience & ‘place’

Figure 1: Drivers of change

3 Key Issues & Opportunities for the Town Centre

People

Understanding the characteristics of the people who live nearby and potentially work and use the town centre is an underpinning element of the masterplan. Once social distancing restrictions are lifted it will become clearer how people’s behaviour and preferences have been altered, and this will determine how businesses, leisure and cultural attractions adapt as a result. It will be important for the masterplan to safeguard the businesses and activities the current customers want as well as attracting new users by understanding who they are and what they desire.

Community Profile

CACI data³ confirms the majority of people using Llanelli town centre before the pandemic had an average or below average level of affluence but one which was broadly similar to other towns in the region. In consumer composition terms, the ‘Modest means’ (younger families in smaller homes with below average incomes) were identified as the largest ‘expenditure category’ group in the town centre, with value and convenience important considerations for this group. However higher levels of prosperity exist amongst a small but significant group of high level professionals and retirees living in the area and these consumers have a higher levels of expectation and spending power.

³ CACI Retail Footprint Report – Llanelli 2020

Category	% Using the centre
Affluent & prosperous	12%
Comfortable/modest means	40%
Financially stretched	41%

Figure 2 – Acorn consumer segmentation. Source CACI 2020

Spending

Approximately 8% of comparison (non-food) expenditure made by residents living in Llanelli is currently spent in the town centre with circa two thirds (£253m) leaking to nearby locations including Parc Trostre, Fforest Fach Retail Park and Swansea. Parc Trostre alone accounts for £125m of this leakage whilst local working patterns are also anticipated to account for expenditure away from the town centre.

Whilst the majority of weekly spend is on convenience (food and essentials), expenditure on clothing/footwear, and eating & drinking is also important (Figure 3). The centre's local convenience role is clearly important as is the value retail role. In addition, safeguarding the established hospitality sector will be important for the future recovery and growth in the town centre.

Commuting

Before COVID-19 some 5,000 people commuted daily out of Llanelli with the main destinations being Swansea, Carmarthen, Cross Hands and Neath. A smaller numbers of commuters travel to Ammanford as well as nearby towns and villages, including Burry Port and Llangennech.

Outlook

With underlying prosperity issues, the wider regeneration and investment context is fundamental to creating a more thriving and resilient local community and town centre. Llanelli has good reasons to be optimistic following the designation of the wider area nationally as an area for future growth under the Future Wales Plan. The focus on growth through the provision of homes, jobs and services will be particularly beneficial in providing a long term basis for planned growth for the area with the potential for supporting the town centre. Current and future investment that contribute to this growth include.

- **Pentre Awel** - academic, business, leisure, health and care in partnership with Hywel Dda Health Board.
- **Tyisha ward** – housing led regeneration project and area of strategic importance, providing a vital link between Llanelli town centre and Pentre Awel.

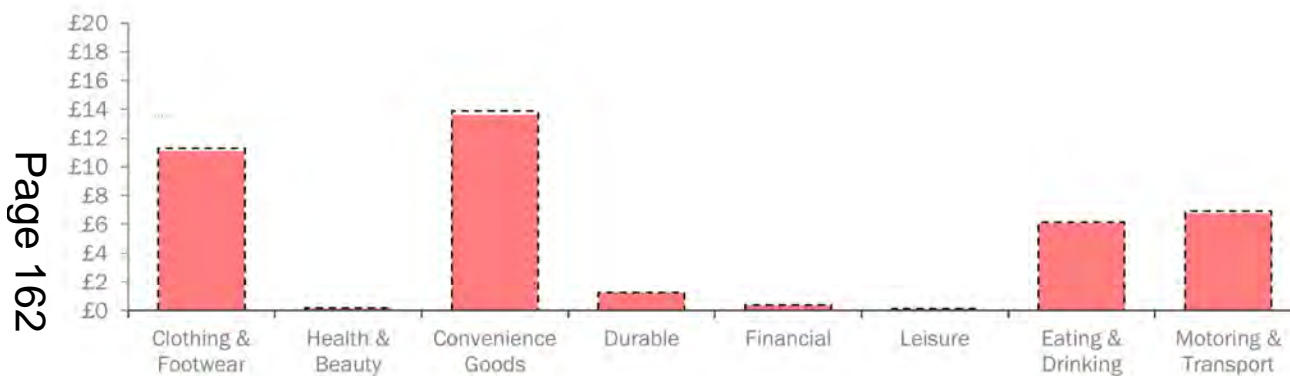


Figure 3: Average weekly household spend
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

- **Burry Port Harbour Development** - a new waterfront area and circa 350 new homes as well as shops, restaurant, pub and hotel.
- **The coast** - Millennium Coastal Park and Attractions, Discovery Centre, Llanelli Wetland Centre, Pembrey Country Park.
- **Beacon Centre for Enterprise** - a centre for enterprise, flexible workspace as well as conference and meeting facilities.
- **Parc Y Scarlets** - rugby stadium and major international sports venue which hosts a number of music and entertainment events and is a strong attractor and focal point of the local identity.
- **Coleg Sir Gar** – the college’s largest campus is located outside of the town providing further education for approximately 10,000 students county-wide.

Business

The key consideration is the need to safeguard viable businesses particularly those in key sectors, which will contribute to a higher quality experience and diversity of uses. The masterplan also needs to support businesses capable of capturing new customers and opening up new markets whether they are new enterprises or established businesses ambitious for growth.

The business footprint demonstrates the number of businesses by type and how Llanelli town centre is dominated by retail across several categories (Figure 4). Whilst it is likely that retail will continue to decline (notably clothing, footwear and durable goods) as a proportion of the town centre. Growth categories will likely be those providing more personal, and experience led services such as leisure, health and beauty, and eating & drinking. Both health and beauty, and eating & drinking are already well established in the town centre, and have potential to grow, including as part of an evening economy offer.

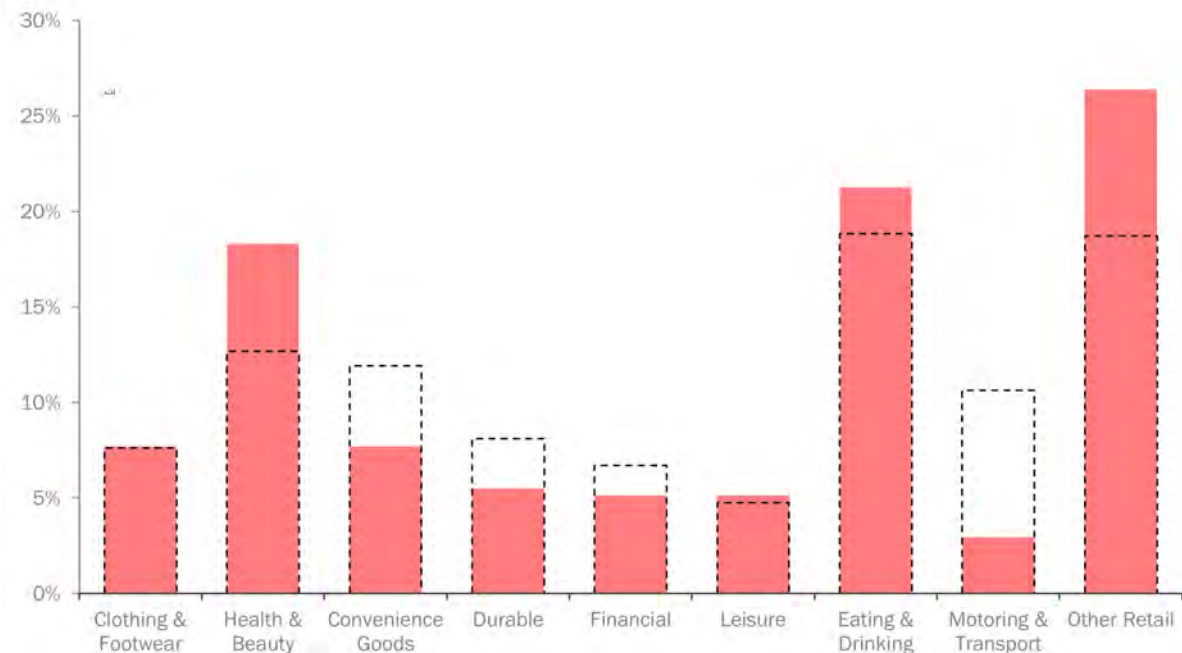


Figure 4: Town centre business footprint
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

Diversity & Speciality

It is possible to buy all the essentials in the town centre from independent businesses or national multiples including ASDA. There are many specialist independents including a bike shop, baker, a deli and a variety of goods and local services. The indoor market is also a highlight providing a vibrant mix of traders.

The good range of businesses are clearly something the local community rely upon and use regularly and could grow to become more experience based to encourage more interaction with a wider catchment and new markets.

Llanelli House, the theatre and the variety of pubs, bars and restaurants is an attractive foundation of the town centre as well as a strong local evening and night-time economy which is accompanied by a range of clubs and late night takeaways.



Figure 5: Examples of independent businesses

Business Property

With the decline in retail, and larger format stores there is the need to re-purpose and adapt a large amount of town centre property. Vacancy rates have grown in Llanelli particularly in the central area along Vaughan Street, Stepney Street and the St Elli Centre. Sustaining occupation levels and avoiding a ‘hollowing out’ of the centre will be critically important.

A specific characteristic of the town centre is the significant amount of property in the freehold ownership of Carmarthenshire CC, including a large amount of leasehold ownerships with circa 40 years left to run. This has implications for property owners looking to adapt and reuse property in response to a changing occupier requirements and demand, and may require longer leases as an incentive for investment over time.

Another characteristic is the configuration of some of the town centre vacant properties (typically long and narrow) which can create problems for subdivision at ground floor level. Other identified issues include the need for assistance to support independent businesses eager to move into larger premises, including the constraints of fit-out costs and increased business rates as a barrier to growth.

For some of the larger units, different opportunities could exist including the repositioning of the Councils leisure offer to provide centrally located facilities. There could also be potential for bringing education and training provision closer to the town centre.

The Local Development Order (LDO) has been in place since February 2019 and is a critical policy tool to promote many of the changes to commercial property that can be enacted relatively quickly. The LDO provides general planning consent for the ground and upper floors, removing the need for planning applications and streamlines the planning system, lowering barriers to a range of new uses and investment.

Digital and Social Media

Growing small businesses and transitioning to medium and potentially larger scale operations requires improved productivity and market reach. It is likely that growing an effective online customer base will be an important part of this future business growth.

Our review of Llanelli digital health suggests that not enough is being done by most local businesses online to maximise their communication - although the presence of community groups is relatively strong. There are, however, notable leaders such as Pets Pantry and HWYL which set a precedent for communication, interaction and subsequent growth.

66% of UK consumers spend 3hr day on social media

52% UK consumers use social media to research purchases

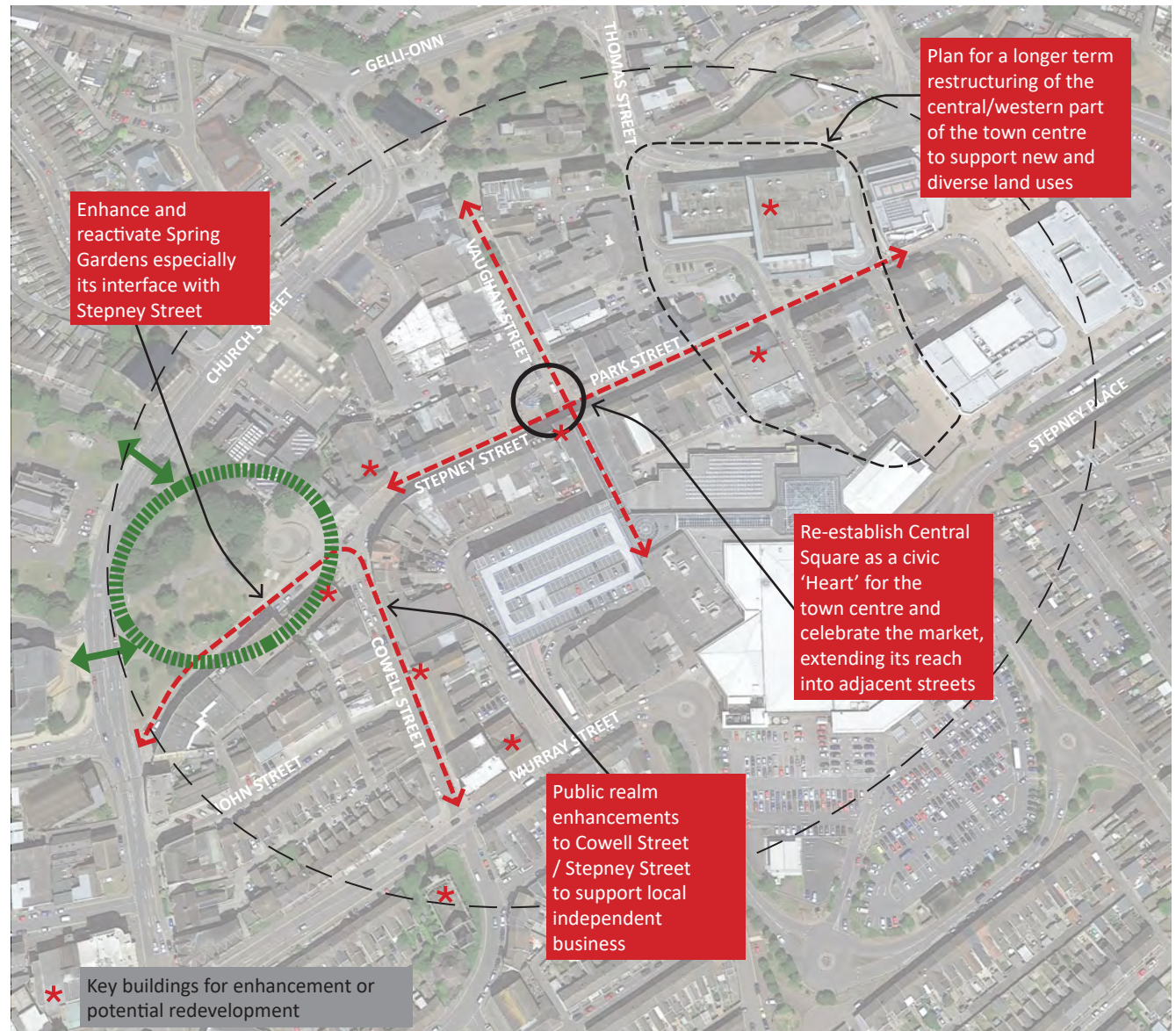
Only 28% of Llanelli town centre businesses active on social media

However, the online presence of the town and businesses is generally weak. This could be strengthened considerably to drive further local and independent business growth, as well as supporting and development of the market.

Place

The recovery masterplan has benefited from the 'Llanelli Town Centre Regeneration Delivery Plan', an earlier masterplanning exercise undertaken in 2018. This study appraises the urban conditions that characterise the town centre and identifies a number of potential projects. The Recovery Masterplan does not seek to replicate this work, but rather assesses it alongside other ongoing and planned projects, to identify priority interventions and strategies to support the survival and recovery of the town centre, especially in light of the current circumstances resulting from the pandemic. These 'Place Projects' are described in more detail in the following sections however, the adjacent plan highlights some of the key principles that have helped to guide the process.

In essence, the central and eastern parts of the town centre are considered the priorities for action. Stepney, Vaughan and Park Street as a focus for retail, have experienced significant negative impacts resulting from the pandemic. The Eastern end of the town has received least investment in recent years, and yet with Spring Gardens and Cowell Street can offer an alternative character and commercial offer. The Western end of the town centre has undergone transformation in recent years however, there remain some large scale opportunities which although longer term, early consideration will be important in determining the town centres strategic direction and sustained recovery.



Summary of Key Challenges & Opportunities

Challenges

- £584k – the estimated amount of weekly spending on non-essential retail, services, leisure and hospitality that has been lost during periods of lockdown.
- A 66% decline in footfall at its lowest level in April 2020 compared to a year earlier. By September 2020, footfall remained 25% lower year on year. However footfall levels have recovered at a higher rate compared with the other Primary Towns in the county.
- 18% - the vacancy rate reflecting the loss of national multiples and independents in the last 12 months. Future closures among other national multiples are expected in 2021.
- Impacts on the wider Llanelli economy have been modelled and show reduced productivity, loss of employment with accommodation and food services businesses expected to experience significant closures. Prosperity measured in terms of average household income is lower than average.

Opportunities

- Working from home/reduced out commuting increases localised spending
- Regeneration projects creating new employment, leisure & living
- New & replacement education & leisure facilities
- New models of shared office workspaces
- Building on the local convenience community role
- Entertainment, Hospitality, Arts, Culture & Theatre
- Markets (indoor & street) distinctive & vibrant
- Foundation of interesting and specialist independents
- Prime frontage buildings available for ambitious independents
- Conservation area & character buildings
- Spring Gardens green open space

Summary of Key Objectives

To drive forward the plan for recovery and growth and to provide a focus for the strategy and delivery plan the following objectives for the town centre have been identified:

- Strengthen the features that make the centre distinctive from the outer town retail parks and supports a greater mix of experiences and uses.
- Sustain the convenience and local service role of the centre, focus on attracting families and younger people and encourage the local population to visit more often, stay longer and spend more.
- A place for living, learning, leisure and entertainment with reasons to visit the centre during the day and at night.
- Manage the shift towards a smaller town centre with a vibrant, fully occupied central core.
- Improve walking and cycling connections with the outer neighbourhoods and strengthen the links with wider coastal attractions
- Safeguard viable businesses and cultivate new start-ups and support independent businesses to grow from within the town centre.
- A SMART town with businesses making best use of digital to grow their market reach, turnover and footfall.
- Using the town's natural 'green & blue' infrastructure to create a stronger sense of place and distinctiveness.
- Strengthen further the marketing, communications, events and activities that attract more people to use the town centre
- A well-presented centre that has tidy streets and clean buildings.
- Initiatives that ensure a range of stakeholders are involved in delivering improvements for the town centre
- Encourage decarbonisation through low carbon and climate-resilient infrastructure, renewable energy and sustainable developments
- Support for the use and promotion of the Welsh language and culture.

4 The Recovery Masterplan

Llanelli town centre is unlikely to return to the pre-pandemic ways of shopping, socialising and working although there remains a great deal of uncertainty with how deep and permanent these changes will become.

The path towards town centre recovery and growth needs to be flexible in response to this uncertainty, but also it needs to focus on building a stronger, more sustainable and durable local economy based on local business, inspiring local people and strengthening the distinctiveness of the place.

The overall strategy for Llanelli town centre recognises that retail is unlikely to command the same size of space, and with the main competition coming from online and the regional out of town retail parks, the centre needs to become more multi-purpose, about experiences and focusing on what makes it distinctive. The town must avoid a 'hollowing out' around Stepney Street, Vaughan Street and the St Elli Centre and establish a vibrant and fully occupied central core. It needs to create opportunities to bring new economic activity and employment back to the centre and grow the role of leisure, learning, local services including health and cultural activities.

The place-making approach addresses the opportunity to re-purpose empty as well as derelict buildings, create greener more active open spaces and destinations that reflect the distinctive local character, attractions and facilities. This will help reconnect with 'walkable neighbourhoods' near to

the centre and the wider hinterland including the regeneration projects, coastal communities and attractions to the west of the town.

Spatial Priority Areas

The masterplans spatial priority areas provide a focus for interventions based on both need and opportunity.



Spring Gardens & Western Gateway

The strategy is to support investment in key projects such as the YMCA and Crown Buildings, build on the temporary measures in Cowell Street in response to COVID-19 and support the small and independent business community. It focuses on enhancing Spring Gardens as a key asset and invigorating the public realm to support outside activities both recreational and commercial. This area also addresses derelict buildings that detract from the quality of the area and if required, manage the contraction of the area in response to the need for less commercial space and concentration on the core town centre. The area is also an important gateway and link with the Tyisha neighbourhood, railway station, Pentre Awel and North Dock.



Central Square & Vaughan Street

As an area facing significant challenges in terms of retail occupancy levels, this central location needs to establish itself as the 'heart' of the town through physical improvements, the promotion of markets and other street activities and good connection with nearby facilities and destinations. There also needs to be investment and potential subdivision of large vacant retail units in support of alternative uses and encouraging independent traders.



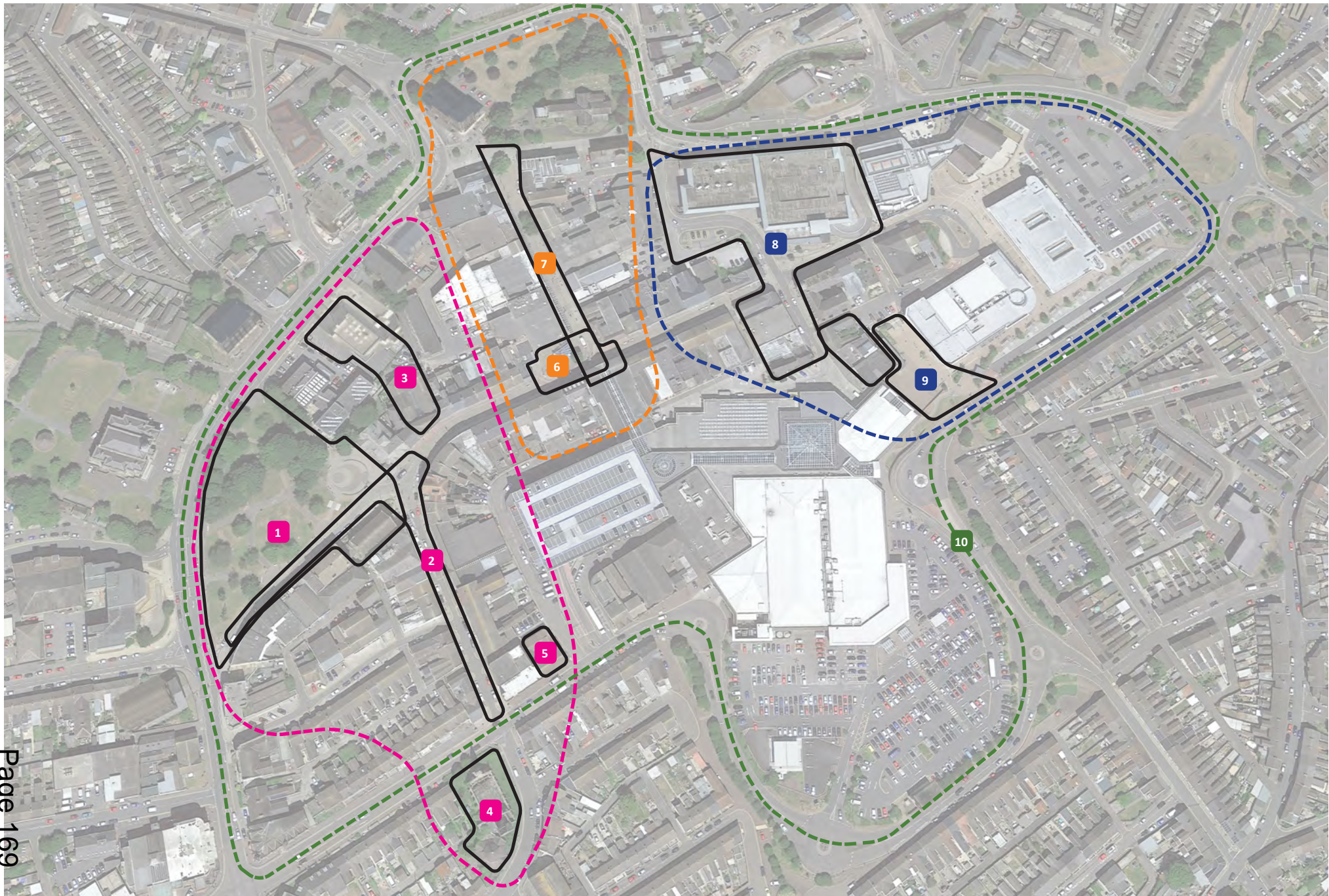
Eastgate Area

Significant initiatives from the public and private sector are already underway in the eastern part of the town centre to regenerate buildings and diversify uses. The established focus on hospitality, culture and leisure activities should be safeguarded mainly through business support initiatives and links with the town centre strengthened. There are further opportunities for large scale regeneration of sites and buildings in the medium to long term.



Boundary / Gateway enhancements

Localised environmental enhancements to roads enclosing the town centre including boundary treatments, pedestrian routes, key buildings, etc.



1. Spring Gardens

Objectives

Reinforce the current investment in adjacent buildings (YMCA) and improve the reputation of the Spring Gardens through the encouragement of more day-to-day uses, enhancement of the interface between the park and adjacent buildings and the facilitation of formal activities and events.

The strategies should support investment in key projects such as the YMCA and Crown Buildings, build on the temporary road closure measures in Stepney Street/Cowell Street in response to Covid-19, to support businesses and enhance Spring Gardens as a key asset and support outside activities, both recreational and commercial.

Actions

1. Prepare a brief for a 'quick win' environmental enhancement scheme focusing on the southern edge of Spring Gardens. The brief should identify opportunities to visually improve the space and investigate potential for increased activity. Interventions should either be temporary or requiring minimal construction/ planning etc. so that works can be implemented for this summer. This should include:
 - Assessment of physical interventions to improve the park edge including ornamental/ annual planting, seating, de-cluttering and

cleaning of the street environment to better present the park and give it a more attractive, maintained presence in the street.

- Opportunities for seating.
 - Opportunities for more convivial lighting, potentially including LED pea lights set within the tree canopies.
 - Opportunities for pop-up street stalls, and associated tables and chairs, for cafe/ice-cream/street food vendors. The corner plaza may provide a suitable location for this activity.
 - Liaise with businesses on Stepney Street to test expansion of increased use of external space for dining. Identify the demarcation of external seating areas, potentially adjacent to the park edge to take advantage of the directly sunlit and green setting. Develop proposals for licensing, furniture, security, management, hours of operation, covered areas.
2. Liaise with private building and business owners with properties adjacent to the park, to bring about cosmetic improvements to buildings and commercial frontages. In particular, the Presbyterian church holds a prominent corner location and should be improved through repair and maintenance, improvement of its garden areas, and possibly architectural lighting or internal lighting to showcase the stained glass windows.

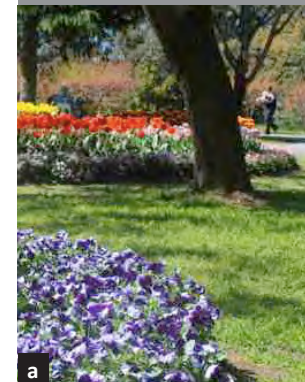
3. The design of permanent environmental improvements to Spring Gardens, including its interface with Stepney Street and the design of the corner plaza opposite the Presbyterian Church, should be incorporated into the redesign of Cowell Street / Stepney Street. However, should the highway works not be undertaken, then a separate scheme for the permanent enhancement of these areas should be a priority. In either situation the improvements should include:
 - Redesign of the corner plaza to have a more attractive presence and to incorporate infrastructure (staging, power, water, shelter) to support events and performance.
 - Street lighting to create a more ambient setting and support safety and security.
 - Review of pavement licences and hard paved areas for eating/drinking businesses to occupy the opposite footway / park boundary
4. Support for BIDs use of the space for events including installation of a permanent big screen. However, this will need careful consideration with regard to appearance, potential nuisance and constraints on future environmental improvements. A screen will also require planning permission.



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a Enhance and activate the edge to Spring Gardens

b Encourage active uses along the park edge



c Creation of usable and adaptable public space to encourage and facilitate active uses

d Enhancements to key buildings

e Improved connections and crossings



2. Cowell Street & Western Section of Stepney Street

Objective

To rejuvenate the west side of the town centre to encourage footfall, support local businesses and improve the appearance, accessibility and safety of the street environment.

The implementation of the temporary road closure and social distancing measures at Cowell Street in response to Covid-19, has allowed the testing of potential impacts on the street environment. Preliminary findings have identified several benefits including the positive use of the space by businesses, with no significant negative impacts on vehicle circulation.

Consequently, this project proposes the undertaking of a feasibility study to investigate options for a permanent scheme that enhances the public realm and considers options for controlling and limiting vehicle access and increasing usable pedestrian space.

Actions

1. Preparation of a brief for a feasibility study to explore ideas for the future general arrangement of Cowell Street. This should include:
 - Options and assessment of a variety of design approaches including pedestrianisation, reduced carriageway widths, shared-surfacing, reduced / controlled access for different vehicle users, reduced / no parking, etc..
 - Opportunities for increasing the usable pedestrian space, outside seating and display areas for businesses
 - Pavement licensing arrangements
 - Consideration of the different contexts, requirements and potential solutions for the northern and southern sections of Cowell Street and the western section of Stepney Street.
 - Consideration of the appearance, character, use, etc. of emerging ideas (and potentially separate project) focusing on the enhancement of Spring Gardens
 - Opportunities for creating increased space in the vicinity of the Market entrance
 - Street furniture and signage audit and proposals for the de-cluttering of the street environment
2. Review of existing Traffic Regulation Orders (TROs)
 - 'Access for all' appraisal of options
 - A palette of materials, street furniture and lighting that is coordinated with the town centre
 - Strategy for stakeholder/ public engagement
 - Cost appraisal
 - Risk assessment
 - Delivery timescale
2. In support of the feasibility study, undertake or commission the following:
 - Topographical survey of the study area
 - Utilities, basement and radar surveys
 - Liaison with statutory undertakers to understand potential future works in street
 - Assessment of funding opportunities
3. Market entrance
 - Refer to '7. Indoor & Outdoor Markets' project.

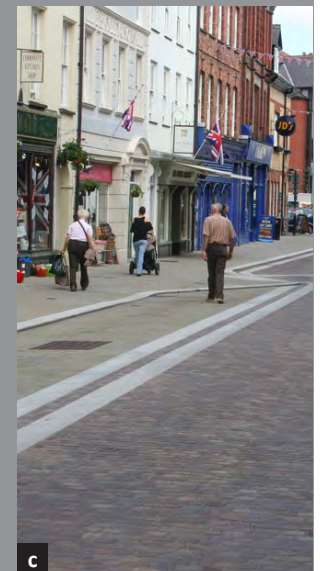


a Use of the pavement space in Cowell Street following temporary road closure

b Enhancement of market entrance

c A range of pedestrian focussed enhancement schemes to the street should be considered

d Proposals should incorporate enhancements to Spring Gardens and lighting



3. The Crown Building & Arcade

Objective

To substantially revitalise and reconnect a distinctive quarter within the town centre, through the regeneration and refurbishment of the currently vacant Crown Building together with the coordinated enhancement of its associated external spaces and the adjacent historic Arcade building.

The Arcade represents a characterful and distinctive place within the town centre and provides an important link between the Crown Building and the Stepney Street. Enhancement of the Arcade in terms of appearance and occupancy, will create another destination in the town centre and bolster the areas appeal as a hub for creative industries.

Actions

1. Work with the owners of the Crown Building with regard to the design of its associated external areas including Crown Precinct, and the relationship between the building entrance and the Arcade.
 2. Liaise with the Arcade owners to discuss the potential for preparing a plan for enhancing the appearance of the building and marketing to attract quality occupiers.
- If appropriate, commission a building survey and conservation assessment /recommendations.



4. Park Congregational Church

Objective

To create an additional destination and increase footfall to the south of Cowell Street through imaginative reuse of an impressive and historic landmark building.

Although the building is currently in private ownership, Task Force intervention should be considered to help kick-start improvements either through a light-touch adaptive reuse, or more substantial architectural redevelopment.

Actions

1. Liaise with the current building owners to ascertain their intentions with regard to the buildings redevelopment.
2. Liaise with the Conservation and Planning officers to consider appropriate and creative approaches for safeguarding the building and bringing about it's positive use to support to the town centre.
3. Pending outcomes for the above actions, commission a visioning study and associated high-level feasibility study including a market appraisal, to explore options for the adaptive reuse of the building and its grounds. Options could consider a range of a levels of intervention including:

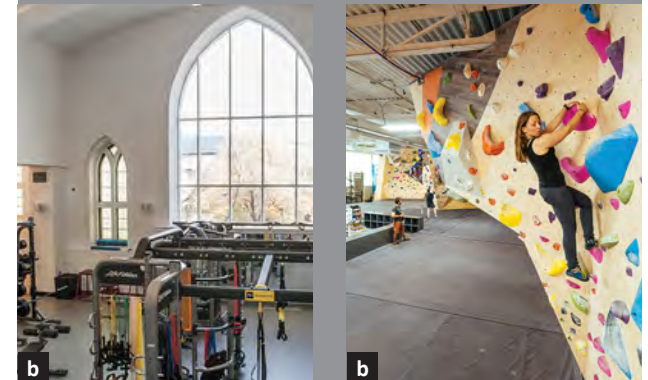
- Light-touch, minimal cost solutions that retain the architectural features with no/minimal need for additional structures, roofing, services, etc. This could include:
 - Commercial use as urban horticultural/ garden nursery (with play and café)
 - Formal adventure play facility with gardens, café
 - Multi-use sports pitch, climbing walls, etc.
 - Recycling, re-use and decorative salvage centre
- Medium scale interventions that would require a lightweight roof, services etc., could include:
 - Multi-use community centre, events / arts / performance space
- Alternatively, investigate the business case for commercial redevelopment



a Adaptive reuse should consider options that do not require significant structural improvements to the building and provide opportunities for commercial and community uses



b Other options which require more significant building works should retain the architectural qualities of the building to create a multi-purpose space that could be used for a variety of commercial, recreational, performance and community uses.



5. Raffles Building

Objective

Located at a key gateway and close to the town centre, the privately owned Raffles Building, represents an opportunity for public sector and private sector to work together to bring about its refurbishment for commercial uses.

Actions

1. Liaise with the buildings current owners to ascertain the future plans for the building.
2. Pending the above commission, a building survey and feasibility study including a market appraisal, into options for commercial and other uses.



6. Central Square

Objective

To reinvigorate and redefine Central Square as a civic focus and 'heart' of the town centre.

Located at the junction of the two primary pedestrian movement routes and accommodating the Hwb and main entrance to the indoor market, the existing public space should be redesigned to create a vibrant, attractive and functional town square. As well as its physical appearance, the re-imagining should include consideration of the types of commercial uses that front the space, the inclusion of marketing stalls and opportunities for street performance and other events, to help ensure vibrancy.

Consideration should also be given to the physical extent of the project, and whether it should include adjacent streets in particular, Vaughan Street.



Actions

1. Agree extent of the working project area.
2. Prepare a design brief for the enhancement of Central Square. The brief should specify key deliverables including:
 - Public space concept design options including 3D visualisations, precedent studies
 - Ideas for renaming the space
 - Strategies for increasing the usable pedestrian space, outside seating and display areas for businesses
 - Strategy for use of the space for market stalls
 - Pavement licensing arrangements
 - Coordination with any proposal for the Market entrance redesign project
 - Environmental enhancement including tree and ornamental planting
 - A palette of materials, street furniture and lighting coordinated with the town centre
 - Consideration of pop-up power supplies
 - Strategy for stakeholder/ public engagement
 - Review of existing Traffic Regulation Orders (TROs)
 - 'Access for all' appraisal of options
 - Cost appraisal
 - Risk assessment
 - Delivery timescale

7. Indoor & Outdoor Markets

Objective

To celebrate and promote the indoor market and more powerfully demarcate its entrances on the street. In addition, support the expansion of the outdoor market both physically into Vaughan Street and potentially along Stepney Street and Bridge Street. Also support its offer beyond 'basic provisions'.

Actions

1. Prepare a brief for the commissioning of a public art scheme to develop concepts for the visual enhancement of the indoor market entrances and the engagement with market stall tenants.
2. Set objectives for the expansion of the outdoor market in the town centre including:
 - Soft market testing for potential new basic provisions traders, as well as alternative traders including street food, antiques, fresh produce etc.
 - Co-ordinate with county-wide market provision to establish expansion in terms of trading days.
 - Identify pitch locations with particular priority given to Central Square and Vaughan Street.
 - Review current pavement licensing permits.
 - Consider implementation of pop-up power

supply in Central Square, Vaughan Street and other key locations

3. Liaise with stakeholders in Bridge Street to consider the use of the area for occasional specialist market / fair events appropriate to the historic character of the setting.

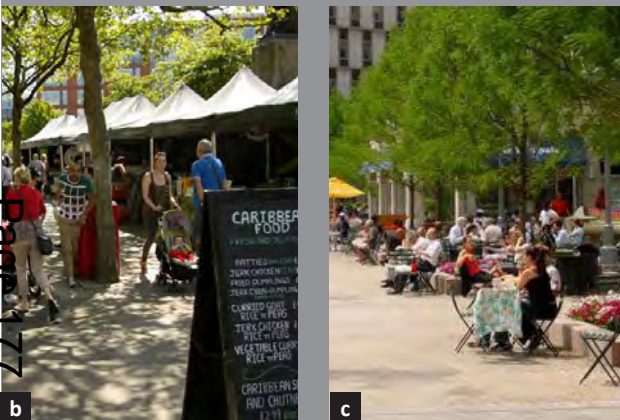


a

The re-imagining of Central Square should include the creation of opportunities for performance and events

The market entrance should be enhanced and opportunities created for market stalls, especially including street food to help activate the space

Uses such as cafés with external seating areas should be encouraged in those premises fronting the space to activate the edges

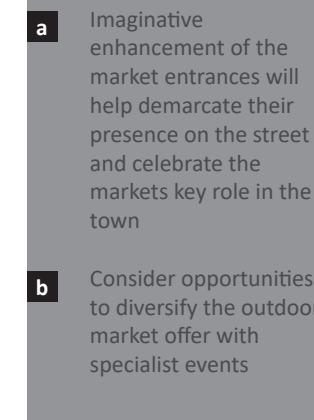


b

c



a



b

Imaginative enhancement of the market entrances will help demarcate their presence on the street and celebrate the markets key role in the town

Consider opportunities to diversify the outdoor market offer with specialist events



a



b

8. Market Street South/ Stepney Street/ Tinopolis Area

Objective

Major strategic restructuring of key central and Northern areas of the town centre in terms of physical arrangement and land uses.

The block of properties located on Market Street South and Stepney Street that have mostly been acquired by Carmarthenshire County Council for redevelopment, should be considered in combination with the Tinopolis building which is known to have structural issues and may no longer be fit for purpose and of limited flexibility in terms of reuse.

A coordinated masterplan for this part of the town centre will allow a more comprehensive and far-reaching vision to be developed which addresses access and townscape issues as well as providing opportunities for progressive land usage, potentially including educational uses.

Actions

1. Compile existing and commission new building surveys to assess the buildings wider potential and site investigation works to inform a site masterplanning exercise.

Liaise with and support existing tenants / owners with regard to future development opportunities and potential relocation options within the town centre.

3. Liaise with potential occupiers including those from the education sector, to ascertain future needs.
4. Commission a high-level masterplan capacity study for the area to explore options for urban design and development strategies and to establish principles for access/connectivity, block structure, height, massing, townscape, etc.
5. Depending on the likely timescale of a comprehensive redevelopment of the wider area, consider an access environmental improvement scheme for Market Street / Mincing Lane. A strategy should work with building owners and occupiers to create a more legible, accessible and attractive streetscape. This area links the town centre and Eastgate. However, it is characterised by a poor quality street environment, dominated by the backs of buildings, ad-hoc parking and vacant areas.
6. Support meanwhile and temporary uses of the buildings to provide an opportunity for new businesses to test concepts, and to establish a foothold in the town centre e.g. The Bingo Hall will be used (temporarily at least) for a re-use shop for recycled goods.



9. Eastgate Connections

Objective

Improve pedestrian links and more seamlessly connect the Eastgate area with the town centre.

Actions

1. Coordinate opportunities through new developments and investment including Y Linc, to improve connections between Stepney Place, Eastgate and the town centre, including the elevated St Elli concourse. A holistic strategy should consider the creation of active frontages, level changes, the removal of barriers and public realm improvements.



10. Town Centre Boundary / Gateway enhancements

Objective

To enhance first impressions and the general attractiveness of the town centre as a place to live, visit and invest in.

Actions

1. Commission an audit of all roads enclosing the town centre, in terms of their visual appearance and pedestrian connectivity together with recommendations for localised environmental enhancements including boundary treatments, pedestrian routes, building appearances, landscape/planting, etc.
2. Develop a delivery strategy for the identified opportunities, including scoping of works, liaison with building property owners and identification of funding sources.



Property Strategy

A core element of the recovery masterplan is property led and reflects the importance of a property strategy which directly supports and contributes to the objectives of recovery and future town centre opportunities.

The impact of the Covid pandemic has accelerated many structural trends which have increasingly shaped the high street over recent years. This is most evident in the changing composition and use of the town centre, especially the growth in vacant retail premises, which include some large voids in prominent locations driven by the closures and pressures facing national multiple retailers and the challenging commercial prospects for securing new and viable reoccupation. The oversupply of retail combined with the loss of many traditional town centre footfall attractors emphasise the importance of securing alternative uses, including new anchors, to help broaden the range of activities and offer, extend 'dwell time' and diversify the reasons to visit the town centre throughout the day and evening. An example could be the growing UK concept of the food hall where a group of small food businesses trade inside a building with a shared tables and chairs for customers.

A key objective will be to encourage and promote new uses with attention on vacant and underutilised premises, including support for re-purposing to create a wider mix of uses including workspace, residential, leisure, education and community. This will require engagement with property owners, investors, the development industry and prospective occupiers. There will be 'areas of opportunity' which offer scope for qualitative improvements to existing property together with some sites that represent more comprehensive refocusing in the longer term.

The role of public sector land and assets further offer opportunities to drive co-location and asset collaboration in the town centre to generate footfall. The town centre Hwb building and other property located in Vaughan Street are a key opportunity for this type of use.

The property strategy also reflects the specific nature of Llanelli town centre including the need to avoid the 'hollowing out' of the centre around Vaughan Street, Stepney Street and St Elli Centre where larger and harder to let properties are located. The challenge also includes the larger properties specific to Llanelli, many with narrow frontage, that will not easily subdivide into smaller units without significant investment.

Carmarthenshire CC have a freehold interest across a large part of the town centre, and a number of the owners have head-leases, some with 30-40 years remaining. The circumstances of declining rent values and relatively short leases is likely to discourage private investment.

Project 1: Local Market Insight

Objective

In order to investigate and encourage realistic opportunities for new town centre uses, particularly through the reuse/re-purposing of vacant and underutilised premises, a property strategy requires market knowledge and proactive engagement with property owners/landlords/ investors and commercial property agents active in the town centre. This is considered essential to early understanding of ownership intentions and aspirations, and market/occupier requirements. This will also align closely with the business support strategy which seeks to encourage new business activities, including the role of property in supporting a range of innovative and flexible accommodation and commercial terms/conditions for occupiers. This objective will:



- Investigate and identify key property assets that represent suitable, realistic opportunities for new uses beyond retail;
- Encourage property owners, investors and developers to consider alternative uses and re-purposing of assets that deliver economic and community value and drive town centre investment;
- Build and promote investor confidence in the town centre with support for a wider mix of uses and encouragement of modern and flexible uses;
- Encourage more flexible and innovative commercial terms/conditions for prospective occupiers especially independents to maximise affordability and de-risk exposure for landlords.

Benefits

- Reduced vacant property rates
- Increased investor confidence
- Increased level of property improvements and refurbishments that supports the local demand
- Broader range of town centre uses including residential
- Greater flexibility that encourages enterprise and business growth

Tasks

1. Undertake regular audit and monitoring of vacant premises in the town centre to identify key landowners and investors and establish, where possible, owner intentions.
2. Liaise with the development industry where known requirements exist, with priority to direct new investment to the town centre.
3. Pro-actively engage landlords with a Council owned freehold property to renegotiated longer leases to specifically encourage refurbishment and investment;
4. Investigate potential to establish a Property Owners/Investors/Commercial Agents Forum on a regular basis to monitor property issues, identify actions/opportunities for the town centre and investigate incentives to support and encourage take up of vacant properties. In addition, maintain dialogue with key town centre property owners e.g. shopping centre, to manage risk and structural change relevant to their assets.

Project 2: Local Development Order

Objective

The town centre focused Local Development Order is in place in Llanelli, and as a planning policy tool, seeks to promote greater flexibility and opportunity for a wider range and mix of uses in the town centre. It is important this is promoted to property owners and commercial agents to communicate the benefits of the LDO particularly at a time of major change in the property market. In Llanelli it is appropriate to review the LDO to ensure there is a focus on the priority areas for regeneration and growth.

Benefits

- Greater flexibility for the property market
- Directing investment towards town centre priority areas
- Increasing the viability of building improvements and mixed uses

Tasks

1. Publicise and actively promote the advantages of the Local Development Order (LDO) to property owners/landlords/developers and local commercial agents to encourage opportunities for greater flexibility of uses and re-purposing of assets, including signposting of relevant Council support initiatives where appropriate.

2. Review the LDO boundary to ensure it reflects the need for a smaller commercial town centre and to maintain a concentration of investment in the central core area.
3. Promote the opportunities for residential uses in the town centre particularly in supporting more viable development. This could include opportunities to partner with Carmarthenshire County Council Housing Services to deliver increased levels of affordable properties to rent.

Project 3: Funding Support

Objectives

There are key town centre properties which contribute to the objectives of the recovery masterplan and the wider health of the town centre, which are likely to require a targeted regeneration investment through public sector intervention given the scale, significance and potential complexity of the properties. It will be crucial to ensure these key properties, whether vacant or subject to a change in circumstances, are brought back into beneficial use given their prospects to accommodate, potentially via re-purposing, new activities and uses which can act as anchors and footfall attractors and deliver new investment. The opportunity also exists to target properties in need of qualitative improvement to improve the quality of the built environment.

Benefits

- Intervening in property to deliver objectives for targeted priority areas
- Increasing the viability of building improvements and mixed uses
- Increasing investor confidence and encouraging the private sector to invest

Task

1. Establish a target list of strategic acquisitions that can draw down funding from the Welsh Government Placemaking Grant which is available for key properties in the town centre.

2. Identify and establish key target properties in town centres and keep under regular review (which align with market knowledge from Project 1 Local Market Insight and Project 4 Public Sector Land and Assets).
3. Identify a target list of properties identified as in need of qualitative improvement and prioritisation of actions, including potential support for refurbishment and fit out.



Project 4: Public Sector Land and Assets

Objectives

The role of public sector land and assets offer opportunities to investigate greater co-location and public sector asset collaboration in town centre locations. The objectives of the Transforming Towns Programme and emphasis on Town Centre First clearly support this objective, particularly given the strong presence of the public sector locally and the scope to investigate new service delivery and activities from town centre premises. This approach would contribute to major footfall generators alongside enhanced community access for services and contribute to a mixed-use destination. In Llanelli, extending the role of the existing Hwb alongside potential to incorporate additional space in Vaughan Street is an opportunity.

Benefits

- Co-location of services and office space
- Retain town centre office footfall and spend

Task

1. Pro-actively working with its public sector partners, including Ystadau Cymru, Carmarthenshire CC will investigate and encourage opportunities for more focused use of town centre locations by the public sector, including the Council's own services.

Project 5: Reform of business rates

Objective

The liability of business rates represents a barrier for many town centre businesses especially independents looking to grow into larger premises, but equally has cost implications for property owners when vacant and considering adaptation. The year-long business rates holiday granted for most Retail, Leisure and Hospitality businesses during 2021/22 as a part of Covid-19 economic support provides a welcome breathing space and encouragement for business to grow whilst a review of longer-term measures should be supported alongside initiatives to encourage business growth.

Benefits

- Property related business costs that support and encourage small business growth.

Task

1. To champion changes to the business rates relief and overall taxation model that support the small and independent business to grow in town centre locations.
2. Encourage property owners to investigate the adaption of town centre property which offer the greatest business rates efficiency, including innovative approaches to minimise empty rates liability which can be a major barrier to intervention.

Business Support Strategy

Recovery will also be reliant on safeguarding key sectors and cultivating local and independent business growth and scaling up through a business strategy that supports businesses to become more competitive with greater potential for attracting footfall, paying higher wages and employing more people. This can be achieved through a targeted multi-agency approach and the encouragement of the transition from meanwhile use and market trader through to a business located on the main high street.

Key areas that will help to build the town centre of tomorrow includes improving its digital health and installing SMART technology. This will assist in attracting new investment and business resilience alongside support to develop the skills and confidence to fully exploit technology.

Project 1: Entrepreneurship & Business Support

Objective

For the town centre to recover and grow there is the need to safeguard businesses in key sectors and cultivate new local enterprises and independent business growth. Closely aligned with the property strategy, the business support strategy is about creating a pipeline of business occupiers across a range of sectors that adds diversity and attraction to the centre. The town centre business support strategy serves several purposes:

- Establishing a place-based approach to business support reflecting the needs and opportunities specific to the town and town centre
- Encouraging new businesses with the potential to occupy a range of requirements - meanwhile spaces, market stalls or traditional commercial property
- Inspiring micro businesses to transition into larger town centre premises
- Supporting businesses to become more competitive with greater potential for attracting footfall, paying higher wages and employing more people.
- Stimulating local demand in support of public and private sector investment e.g. strategic property acquisitions, creation of business incubation space, shared work hubs and investment in reconfiguring property to match new requirements.

Benefits

- Increase business enquiries supported with advice and mentoring
- Increased number of businesses and jobs safeguarded
- Increased number of new businesses
- Increased rate of micro and small business growth
- Creation of tailored support packages to encourage investment in key sectors
- Decreased levels of vacant property

Tasks

With several agencies providing support to businesses of various sizes and operating across a broad range of sectors, the delivery of business support at a place-based level requires a coordinated and targeted approach.

1. Bring all aspects of business support into one place (either virtual and/or as part of a Hwb), making it clear and simple for businesses to access and find the help they need. The role of the Carmarthenshire CC Economic Development team is helping to simplify for entrepreneurs and businesses a complex picture of entrepreneurship and business support products and ensuring coordinated multi-agency delivery. Partners include the Council, Business Wales, Federation of Small Businesses,

South Wales Chamber, Centre for Business and Social Action, MenTrau Iaith, University of Wales Trinity Saint David, Coleg Sir Gar, etc..

2. Promote and communicate at a town level the range of support available and target entrepreneurs and businesses via schools and colleges, businesses groups and organisations and targeting existing town centre traders.
3. Provide access to a helpline, website, and one-to-one sector-focused support, provide free support and guidance at any stage of the business life-cycle:
 - Starting a business
 - Growing a business
 - Developing skills
 - Networking
 - Finding finance
 - Finding a property

Project 2: Digital Town Centre & Skills

Objectives

Given the pressure on the High Street and the impact of COVID-19, it's important that businesses can exploit digital technology, in the same way as supermarkets and shopping centres have done for years. This provides businesses with the opportunity to grow their market and increase turnover locally and globally whilst remaining rooted in the town centre.

The digital health of Llanelli has demonstrated that just 28% of town centre business are active on social media where the majority of consumers 'hang-out' and can be influenced. Digital health is also influenced by the availability of new technology that exists and is already being used in Welsh towns to help business and places make informed decisions and plan for the future. The objective is to invest in infrastructure in support of creating a SMART town with businesses supported to make the best use of digital to grow their business. This includes:

- Putting in place ultra-fast, ultra-reliable connectivity and innovation networks
- Providing the support, training and encouragement network that helps to create a digital culture and enhanced business skills.

Benefits

- Increased levels of town centre business active on social media

- Increased digital competency levels, qualifications and use of digital technologies
- Increased incidents of business collaboration using social media & technology

Task

1. Carmarthenshire CC as lead authority for the Digital Infrastructure Programme of the Swansea Bay City Deal will work to ensure ultra-fast, ultra-reliable digital infrastructure and connectivity is available for the town to include but not limited to full-fibre gigabit-capable broadband, 4G/5G mobile, and Internet of Things (IoT) innovation networks.
2. Continue to build the Carmarthenshire Innovation Network, an 'Internet of Things' network for businesses, communities, and partners to exploit. Coverage has been achieved across Llanelli and Pembrey Country Park.
3. As part of the business support package, and alongside initiatives including Super-Fast Business Wales, investigate and target the town centre with a Digital Initiative through a combination of, but not limited to, digital events, awareness, skills and support to thrive and take advantage of the digital opportunities
4. Adopt a social media data and insights tool for the town and its businesses that provide data, expertise, knowledge, training and support to help them to connect with their audience, to analyse what content engages them and measure what's impacting business results.

Place Management Strategy

Town centres are places that attract a diverse combination of people from the everyday user, creative, entrepreneurial and explorer, and no masterplan can force a lively attractive centre into being, but it can create the conditions that allow that to grow.

A prosperous town centre must be a place where people are safe, well managed and excited to be. And as it's no longer possible to guarantee the daytime footfall of shoppers and local workforce, more than ever the town centre must become more stimulating, exciting, community and cultural destinations both during the day and at night.

Place management communication and marketing is fundamental to achieving this objective, and in Llanelli town centre, this is managed by Ymlaen and Llanelli Business Improvement District (BID). Following the recent successful renewal, the BID has a £456k budget over the next 5 years for a range of initiatives:

- Marketing - boosting marketing – events, seasonal attractions, beer festival, heritage and culture, aggressive marketing
- Enhancing -enhancing experience – digital screen, brighten the centre, addressing ASB
- Improving - improving access - £1 Saturday parking, local 'days out', better pedestrian and cycling, linking with seafront
- Developing – supporting the development of various strategies for the town centre

The masterplan specifically supports the delivery of the BID's business plan, for instance, specific place projects such as the improvements to Spring Gardens have the potential to reinforce the area as an events space. Other masterplan ambitions aligned with the BID include initiatives to train and support businesses skills.

Also, several actions are already taking place or can be enhanced that will positively contribute towards the management and user experience of the town centre.



Project 1: Transport & Movement

Objective

The reliance on private vehicles needs to diminish if we are to meet the challenges of climate change and a fully integrated public transport service connecting rail, bus and cycle hire schemes would allow people to easily connect with and travel into and around the town from surrounding neighbourhoods.

In Llanelli, there is an opportunity to champion the towns growing cycling credentials, with close ties to nearby coastal cycling routes and the cycling circuit attraction at Pembrey Country Park. The Brompton Bike Hire scheme will be introduced in Llanelli during March 2021 and is one of the first towns in Wales to have this special brand associated with local bike hire. The Brompton scheme provides a versatile folding bike scheme that supports travel to work, home, and on public transport. The public dock will be located at Llanelli train station.

E-bike charging points will also be installed in the town at the Beacon Enterprise Centre and Eastgate and nearby Pembrey Country Park. The Council have also purchased E-Cargo Bikes for town centre businesses to utilise.

Car parking charges has been a concern of town centre businesses for some time and the BID with Carmarthenshire CC has developed several initiatives including £1 parking Saturdays in the multi-storey car park during the Christmas period. Free parking days planned and advertised with

Carmarthenshire CC and the current free parking scheme on Mondays and Tuesdays between 10 am and 4 pm in Council car parks. Revenue from car parking funds directly supports highway improvements and transportation services in support town centres.

Benefits

- Increased levels of walking and cycling journeys
- Increased use of active travel for businesses journeys

Tasks

1. Investigate opportunities for a Brompton Bike Dock to be located in the town centre once the scheme is established.
2. Helping local businesses with new local logistics solutions through E-cargo bikes will require a clear strategy to encourage businesses to adopt the bikes as part of their business and to overcome practical barriers including adequate bike storage.
3. Continue to monitor the impact of town centre car parking charges during the period of their recovery from Covid-19 and the effectiveness of the free parking initiatives already in place.

Project 2: Culture & Entertainment

Objective

As the town centre becomes less about shopping and more about the experience, cultural activity and attractions become more important than ever in ensuring vitality. Cultural destinations (arts, heritage, entertainment) with a broad appeal anchored in the centre need to be safeguarded. In Llanelli, this includes the Ffwrnes Theatre, Llanelli House, Odeon cinemas and potentially, once refurbished, Calon Llanelli.

Benefits

- Diversifying town centre attraction
- Increased daytime and evening footfall

Tasks

1. Prioritise growing the calendar of events led by the BID and the coverage of a broad range of tastes and interests including Vintage Festival, retro and Welsh music and food and drink.
2. Support cultural venues and creative business such as Tinopolis that not only add to the town's profile, but also strengthen the town's potential for growing a creative economy.

Project 3: Building Cleansing & Maintenance

Objective

Despite this positive step by the BID and Carmarthenshire CC to improve the appearance of the town centre and key buildings, many are also held by absentee landlords who view property primarily as a commercial asset and not as one that contributes to the overall appearance of the centre. The objective is to ensure properties, particularly on upper floors are not left to fall into disrepair.

Benefits

- Reduced number of mismanaged buildings
- Improved townscape quality

Task

1. Survey to identify mismanaged assets in the prioritised areas of the centre that detract from the quality of the town centre.
2. Identify leasehold ownership and enter into discussions to assist with their cleansing and appearance.

Delivery

Whilst investment in projects funded through programmes such as the Targeted Regeneration Investment (TRI) continue to make a difference, the masterplan identified that more is required.

The recovery masterplan is for everyone, not just Carmarthenshire CC, and it will require the commitment and efforts of all stakeholders if the town is to achieve success and deliver continued prosperity for the centre. This new plan is necessary to provide a clear pathway to town centre recovery and growth which will be focused upon Business, People and Place, providing the framework in which prioritised actions over three levels of importance:

1. Immediate - actioning of quick-win permanent or temporary schemes, to take advantage of potential opportunities arising after the end of lockdown and for the remainder of 2021
2. Short term - delivery within the next 24 months - priority transformational projects that may require planning, funding, approvals and may cause some disruption during delivery
3. Strategic - Significant projects and strategies that will help guide the town centres direction to be resilient and to respond to long term changes

Place projects

- Project 1: Spring Gardens
- Project 2: Cowell Street & Western Section of Stepney Street
- Project 3: The Crown Building & Arcade
- Project 4: Park Congregational Church
- Project 5: Raffles Building
- Project 6: Central Square
- Project 7: Indoor & Outdoor Markets
- Project 8: Market Street South/ Stepney Street/ Tinopolis Area
- Project 9: Eastgate connections
- Project 10: Town Centre Boundary / Gateway enhancements

Property projects

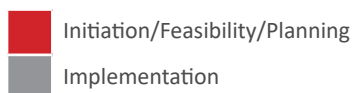
- Project 1: Local Market Insight
- Project 2: Local Development Order
- Project 3: Funding Support
- Project 4: Public Sector Land and Assets
- Project 5: Reform of business rates

Business projects

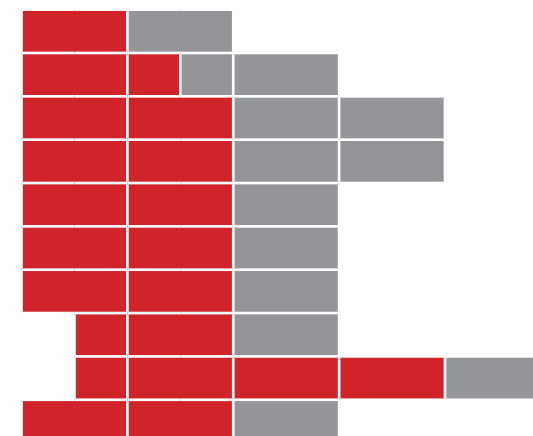
- Project 1: Entrepreneurship and Business Support
- Project 2: Digital Town Centre & Skills

Place management projects

- Project 1: Transport and Movement
- Project 2: Culture & entertainment
- Project 3: Building Cleansing & Maintenance



Year 1 Year 2 Year 3 Year 4 Year 5+



Priorities

A series of projects are set out by the masterplan, however, it is recognized that it is unlikely that everything can be tackled at once and there will be a need to focus on the most important and high impact projects. All the actions identified support recovery and long term growth. Where more complex but high priority projects are identified, early development of outline business cases and design development should be prioritised.

Projects that are likely to be funded from existing capital or revenue streams or through the immediate funding opportunities identified below, should be a priority.

To help deliver and drive forward the masterplan, the potential exists for funding support to the Local authority to support new Town Centre Managers with specific responsibility for the recovery of the town centre and the implementation of town centre initiatives.

Funding

The funding landscape in Wales is experiencing a period of rapid transformation, which is being led by Welsh Government and the Local Authority in response to the pandemic, and the UK Government with responsibility for the replacement funding programs following the UK's departure from the EU. At the time of writing some uncertainty exists around how some funding will be delivered. In light of this, the masterplan needs to be responsive over the coming 12-24 months and aligned to these emerging programs.

Welsh Government – Transforming Towns Programme

Existing Targeted Regeneration Investment (TRI) program comes to an end in 2020/2021 and is replaced by the Transforming Towns Grant. This is a broad and flexible package of support that allows partners to decide upon the most appropriate mix of interventions and how to put them into practice effectively in each town. The new funding package will offer support for a wide range of projects, from green infrastructure developments, internal and external improvements for business owners, improvements to town centre markets, the creation of new uses for vacant buildings, and driving activity to support the 'digital towns' agenda. Those eligible to apply for funding include local authorities, town centre businesses, Business Improvement Districts and Town and Community Councils.

Also, there is support in the form of a Town Centre Repayable Funding Scheme – this has the potential to provide £2m funding for Carmarthenshire CC to acquire key town centre buildings linked to strategic regeneration outcome.

UK Government

- The UK Government has published prospectus documents (March 2021) on how local areas in Wales will be able to submit bids for the Levelling Up Fund and Shared Prosperity Fund (Community Renewal Fund during 2021-22) as a direct replacement for EU structural funds in Wales.
- Levelling Up Fund – small in scale and geography including regenerating a town centre, local investment in cultural facilities or upgrading local transport infrastructure. Delivered by local authorities who can submit one bid for every MP whose constituency lies wholly within their boundary with preference given to bids from higher priority areas including Carmarthenshire.
- Shared Prosperity Fund – EU Structural Funds will continue until 2023 and replaced through the new UK Shared Prosperity Fund. This new Fund, to be launched in 2022, will operate through the UK Government but to start with, the UK Community Renewal Fund is being provided for 2021-22 and targets priority local authority areas including Carmarthenshire.

Carmarthenshire County Council

In response to COVID-19, the Council has established underpinning resources to support the recovery and growth of towns and the wider economy. Working with the Welsh Government, a range of new initiatives and business support will be made available.

Business Recovery and Support

Subject to formal approval it is anticipated that the County Council led business recovery and support funding streams will be made available in 2021

- Recovery Fund to safeguard/create sustainable jobs within target growth sectors
- Revenue Support Fund to invest in skills, marketing and diversification to safeguard and grow jobs.
- Carmarthenshire Rural Enterprise Fund - development of new and existing business premises
- Transformational Commercial Property Development Fund - to provide financial assistance for the construction of buildings for industrial and commercial use.
- Business Start-Up Fund - capital support for the creation of new businesses resulting directly in the creation of jobs
- Business Growth Fund - support towards capital expenditure projects and specialist revenue expenditure, where new jobs are created

Local Marketing and Distinctiveness

Funding has been secured via the Leader programme to promote rural Carmarthenshire to tourists - led by Carmarthenshire CC Marketing & Media Team to develop stories and reasons to visit, those that amplify Welsh culture, language, locally produced produce etc. and deliver a marketing action plan (including branded promotional material, prepared social media content e.g. text, images and video, a business toolkit.

Empty Premises/Meanwhile Uses

Welsh Government funding to develop a good practice guide for the region enabling communities to develop empty premises into 'meanwhile' spaces or pop up shops, providing practical advice on legal issues, business rates etc.. Potential to utilise the £10k Leader funding to fit out empty premises for this purpose

A Circular Economy - A Sustainable Recovery From Covid-19

Carmarthenshire CC is currently developing a strategy to support local investment in circular businesses and enterprises; that is, enterprises that keep things in use longer, through re-use, repair, re-manufacture and refurbishment, and in doing so, helping regenerate the community by adding jobs and developing skills locally. By doing this locally, the initiative will not only keep money in circulation within the county but vitally also reduce the impact that Carmarthenshire has on the environment. New potential projects are encouraged with local stakeholders, business owner, entrepreneur, volunteer etc.

The delivery plan indicates time-scales, suggested delivery partners and next steps. In each instance, a detailed review of the project scope would be required and or more detailed design work to provide costings.

The plan includes three stages, short, medium and long term with a suggested level of priority afforded based on stakeholder engagement and the need to complete certain tasks such as data collection to enable the development of key projects.

* Since the publication of the Recovery Masterplan, the Wales Audit Office has published a Regenerating Town Centres Tool Kit for Local Authorities to self assess their approaches and improve their work on town centres. The masterplan has followed the principles of the Tool Kit and Carmarthenshire Council will fully adopt these principles going forward.

Owen Davies Consulting
1A Nevill Street,
Bergavenny. NP7 5AA



CABINET

17TH JANUARY 2022

REVENUE BUDGET STRATEGY 2022/23 TO 2024/25

Recommendations / key decisions required:

1. That Cabinet:

- 1.1 Note the contents of the report and approve the three year Budget Strategy as a basis for consultation. Specifically seeking comments from consultees on the efficiency proposals in Appendix A.
- 1.2 Note the unallocated sum of £757k in the current strategy, which will be given further consideration at the completion of the consultation as noted in paragraph 4.4 of the report
- 1.3 Approve the proposal to allocate £500k from forecast current year underspends to accelerate our Decarbonisation plans in the forthcoming year.

Reasons:

To provide the Cabinet with an overview of the budget issues and outlook for the forthcoming years

Relevant scrutiny committee to be consulted: YES

All scrutiny committees

Cabinet Decision Required YES

Council Decision Required NO

CABINET MEMBER PORTFOLIO HOLDER:-
Cllr. David Jenkins – Cabinet Member for Resources

Directorate: Corporate Services

Name of Head of Service:
Randal Hemingway

Report Author:
Randal Hemingway

Designations:

Head of Financial Services

Tel:

Email addresses:

rhemingway@carmarthenshire.gov.uk

**EXECUTIVE SUMMARY
CABINET
17TH JANUARY 2022**

REVENUE BUDGET STRATEGY 2022/23 TO 2024/25

The report provides members with an overview of the Revenue Budget for 2022/23 and the following two financial years.

It details the budget process, the current Welsh Government (WG) provisional settlement, the Final settlement timetable and identifies the validation and budget pressures that need to be considered by members in setting next year's revenue budget.

The report will also form the basis of the budget consultation process that will be undertaken during the period January to February.

DETAILED REPORT ATTACHED?

YES

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: **Randal Hemingway** **Head of Financial Services**

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	NONE	YES	NONE	NONE	NONE	NONE

1. Policy, Crime & Disorder and Equalities

The budget has been prepared having regard for the Council’s Corporate Strategy, and the Well-being of Future Generations (Wales) Act 2015. Equalities Impact Assessments have been undertaken on the budget proposals in order to consider and assess the potential impact with respect to protected characteristic groups. The Equalities Impact Assessments will be further developed following consideration of possible mitigation measures.

3. Finance

The report provides an initial view of the Budget Strategy for 2022/2023, together with indicative figures for the 2023/24 and 2024/25 financial years. The impact on departmental spending will be dependent upon the final settlements from Welsh Government, and the resultant final Budget adopted by County Council.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **C. Moore** **Director of Corporate Services**

1. Scrutiny Committee

Consultation with all Scrutiny committees will be undertaken and results will be reported during the budget process

2. Local Member(s)

Not Applicable

3. Community / Town Council

Consultation with the Town & Community Council Forum will be undertaken and results will be reported during the budget process

4. Relevant Partners

Consultation with relevant partners will be undertaken and results will be reported during the budget process

5. Staff Side Representatives and other Organisations

Consultation with Trades Unions and other organisations will be undertaken and results will be reported during the budget process

**CABINET MEMBER PORTFOLIO
HOLDER(S) AWARE/CONSULTED**

YES

Section 100D Local Government Act, 1972 – Access to Information List of Background Papers used in the preparation of this report:

Title of Document	File Ref No.	Locations that the papers are available for public inspection
2021/2022 3 year Revenue Budget		Corporate Services Department, County Hall, Carmarthen
WG Provisional		Corporate Services Department, County Hall, Carmarthen

REPORT OF DIRECTOR OF CORPORATE SERVICES

Cabinet

17th January 2022

REVENUE BUDGET STRATEGY 2022/23 to 2024/25

HEAD OF SERVICE & DESIGNATION.	DIRECTORATE	TELEPHONE NO.
C Moore, Director of Corporate Services	Corporate Services	01267 224121
AUTHOR & DESIGNATION	DIRECTORATE	TELEPHONE NO
R Hemingway, Head of Financial Services	Corporate Services	01267 224886

1. INTRODUCTION

- 1.1.** Cabinet in July 2021 received a report on the Revenue Budget Outlook for 2022/23 to 2024/25 which appraised Members of the financial outlook and the proposals for taking forward the budget preparation for the three year period.
- 1.2.** This report provides Members with the current view of the Revenue Budget for 2022/23 together with indicative figures for the 2023/24 and 2024/25 financial years. The report is based on officers' projections of spending requirements and takes account of the provisional settlement issued by Welsh Government on 21st December 2021.
- 1.3.** Whilst significant work has already been undertaken in preparing the budget, this represents an initial position statement which will be updated over the coming month as the budget is further developed, council members are engaged and public consultation takes place. The final settlement is due to be received from Welsh Government on 1st March 2022.
- 1.4.** The report is broken down into six parts:
 - Funding Projections
 - Budget Requirement
 - Impact on the Authority's budget requirement
 - Consultation
 - Conclusion
 - Recommendations

2. PROVISIONAL SETTLEMENT

2.1. The provisional settlement was announced on Tuesday 21st December 2021. Provisional figures for individual Local Authorities were provided for 2022/23, with indicative figures for 2023/24 and 2024/25.

2.2. The Westminster Comprehensive Spending Review announced in November 2021 included a significant Barnett consequential, reported at £1.6 billion, though analysis from Cardiff University indicates that year on year Welsh Government's budget still drops by over £1 billion due to the cessation of one off Covid-19 funding. There were also the following announcements which have a material impact on our budget considerations:

2.2.1. A cessation of the pay freeze proposed by the Chancellor a year earlier.

2.2.2. A national living wage of £9.50, an increase of 6.6% on the current £8.91, which is a significantly bigger increase than previous years.

2.3. The main points of the Provisional Settlement 2022/23 on an all Wales basis are as follows:

2.3.1. Local government revenue funding for 2022/23 set at £5.108 billion, an increase of 9.8% (£456 million) compared to 2021/22, before adjustments. On a like for like basis after adjustments of £19 million, the increase is 9.4% on an all Wales basis.

2.3.2. Our analysis of this is as follows:

The settlement is said to include £36 million (all Wales) funding for Local Authorities to meet the cost of Welsh Government's policy to pay social care workers a living wage, however this funding is neither clearly identifiable

nor is it shown as a transfer into the settlement which would normally be expected.

The settlement includes the part year effect of the September 2021 Teachers pay award, however this figure does not show as a transfer in, unlike previous years.

£5million (10%) of the All Wales Social Care Workforce grant has been transferred in, however there are no details explaining this treatment.

2.3.3. As with last year, there is no funding floor. Individual settlements range from +11.2% (Monmouthshire) to +8.4% (Blaenau Gwent).

2.4. The Settlement figures for Carmarthenshire are:

2.4.1. After adjustments for WG identified transfers, the increase in the provisional settlement is 9.2% (£26.335 million). The Aggregate External Finance (AEF) therefore increases to £311.957 million in 2022/23. This includes £302k in respect of Social Care Workforce grant.

This settlement is significantly above our original assumption of +2.0%, **however there is significant risk to our funding position as the minister explicitly requires Local Authorities to accommodate the risks of future pay awards, inflationary pressures and ongoing Covid-19 related costs and continuing income reduction.** The scale of these uncertainties is genuinely unprecedented, as discussed in detail later in this report.

We have adjusted our MTFP assumptions for 2023 and beyond in line with WG guidance and increased the assumed level of future inflation. Our proposed savings total £11.7 million over the three year MTFP period.

2.5. Details of the Welsh Government Service Specific Grants were provided alongside the provisional settlement on 21 December 2021 at an all Wales level. It is notable that many remain at broadly at similar level (cash value level) to previous years, which will in reality reduce outputs given the impact of pay awards and general inflation. There are however some important exceptions:

- WG funding to support schools catchup/ recovery activities from the ongoing impacts of COVID-19 on learners has been continued. The Recruit Recover Retain Standards (RRRS) Grant has been set at

£37.5 million All Wales, which is expected to provide in excess of £2 million for Carmarthenshire’s Schools.

- The Additional Learning Needs grant, introduced two years ago, has doubled from £7 million to £14 million across Wales. This recognises the cost of implementing new legislation and is estimated to contribute c. £400k to Carmarthenshire.

As with last year, there are a number of grant changes referred to in the text to the main WG budget narrative which are not reflected in the Local Government provisional grant tables, which it is assumed are due to be updated for the final settlement.

3. BUDGET REQUIREMENT 2021/22

3.1. Current Years performance (2021/22)

3.1.1. As the Authority’s core spending requirements remains constant year on year, a review of current year’s performance is important in identifying whether there are any underlying problems within the base budget

3.1.2. The current projection for the Revenue Outturn for 2021/22 (based on the October 2021 monitoring) is as follows

Service	Approved Budget £'000	Total Expenditure Forecast £'000	Variance Forecast For Year £'000
Chief Executive	16,740	16,192	-548
Communities	108,104	108,273	169
Corporate Services	29,556	28,664	-892
Education and Children's Services	179,660	179,660	0
Environment	61,390	60,936	-454
Departmental Expenditure	395,451	393,725	-1,726
Cont from Dept/Earmarked Reserves			0
Capital Charges	-20,155	-20,655	-500
Levies and Contributions	10,889	10,889	0
Transfer to/ from Reserves	0	946	946
Net Expenditure	386,185	384,906	-1,279

The main reasons for the departmental variances are as follows:

- o Chief Executive’s Department: shortfall in income generation from Commercial properties, offset by underspends across staffing budgets

- Education and Children's Services: the department's core budget is currently forecasting to break even for the year, however schools working budgets are forecasting to utilise £4.7m of their reserves in the current year.
- Communities Department: underspends in Older Peoples budgets offset by overspends in Learning Disabilities division. Without the support of the Covid Hardship Fund, the overspend would be significantly higher.
- Corporate Services: Underspends on pre Local Government Reorganisation pension costs, Rent Allowances, and Housing Benefit Administration, partially offset by a forecast increase in demand for Council Tax Reduction Scheme.
- Environment Department: Above target income on Property Maintenance and Planning service underspends, partially offset by increased demand and supplier costs in school transport

At this point the Authority is currently forecasting a variance of £1.3 million. It is proposed that £500k from the forecast underspend is set aside for decarbonisation. Whilst the Welsh Government capital settlement provides additional funding for decarbonisation, this does not commence until 2023/24. Our action would allow us to accelerate our response to the climate emergency. This will be provided as funding into the Capital Programme.

3.2. Validation

- 3.2.1. Validation reflects the changes in expenditure requirements to deliver the **current level** of services in future years. Primarily this is inflation, but also includes some service specific changes. Some areas of inflation are currently at rates that have not been

seen in recent years and present risks to our budget. The key validation factors are as follows:

	<u>2022/23</u> <u>Original</u>	<u>2022/23</u> <u>Proposed</u>	<u>2023/24</u>	<u>2024/25</u>
General inflation - Expenditure	2.5%	4.0%	3.0%	2.5%
General inflation - Fees & Charges	2.5%	2.5%	2.5%	2.5%
Electricity*	2.5%	20.0%	5.0%	5.0%
Gas*	2.5%	20.0%	5.0%	5.0%
Fuel	5.0%	5.0%	5.0%	5.0%
Pay Inflation - non teaching	2.50%	4.00%	2.50%	2.50%
Pay Inflation - Teaching	2.50%	4.00%	2.50%	2.50%
NI increase	0.00%	1.25%	0.00%	0.00%
Levies	2.9%	3.3%	2.5%	2.5%
Pension Contributions	nil	nil	nil	nil
Capital Charges	£500k	£500k	£500k	£500k

* 2022/23 increase explicitly recognised in pressures due to extraordinary scale

3.2.2. Our previous planning assumptions include future annual pay awards of 2.50% for all staff. Since the budget outlook paper was considered in July 2021, the situation has evolved:

- Teachers Pay - the September 2021 Teachers pay award has been implemented at 1.75% (vs our assumption of 2.5%), but the Office for Budget Responsibility has forecast next year's pay award at 4% (UK)
- Employers have made a final offer of 1.75% for NJC staff for 2021/22, which Unions have rejected. This pay award, once agreed, will apply from April 2021

3.2.3. The Council's 2021/22 budget was set on the basis of a 2.5% award. Against this, the latest employers offer for the majority of NJC staff (the largest share of our payroll) was 1.75%, in line with the September 2021 teachers award. This provides some potential budget headroom. Our assumption next year is increased to allow for a 4% award from September 2022 for Teachers and April 2022 for NJC staff. Depending on the extent to which current inflation persists, even at this increased level, this could still be considered a real terms reduction.

3.2.4. In September 2021, the Prime Minister announced an increase of 2.5% to National Insurance, split equally between employee and employer, to provide increased funding for health and social care. We estimate the 1.25% increase in employer rates is worth c. £2.7 million to our budgets.

3.2.5. We have received confirmation from the fire authority that their indicative budget assumes a levy increase of 3.24%. As with last year, this is based on the explicit understanding that firefighters

pension cost increases continue to be met through direct grant award.

3.2.6. As a result of these factors, validation is at its highest level ever in recent years and adds over £16 million to the current year’s budget.

3.3. Cost Reduction Programme

In anticipation of the settlement challenges, significant work to review service efficiencies/rationalisation proposals has been undertaken. This continues to be exceptionally challenging as the pandemic - and our response to it - continues to have a significant ongoing impact upon service delivery.

3.3.1. The savings targets set for each financial year are as follows:

	2022/23 £m	2023/24 £m	2024/25 £m
Original targets (July Budget Outlook report)	5.209	5.333	5.024
Proposed Savings (following Provisional Settlement)	3.839	3.908	3.982

3.3.2. Accordingly, departments have developed a range of proposals, and these efficiencies are included in **Appendix A** of this report.

- The efficiency proposals are categorised as follows:

Managerial – Efficiencies that result in no perceivable change to the overall level of service delivery.

Policy – Efficiency or service rationalisation proposals that will directly affect service delivery.

	2022/23 £m	2023/24 £m	2024/25 £m
Managerial	3.654	3.358	3.240
Existing Policy	0.070	0.550	0.742
New Policy	0.115	Nil	Nil
Total	3.839	3.908	3.982

(Detail at **Appendix A**)

3.3.3. The summary sheet at Appendix A sets out the savings targets set for individual departments and the value of savings currently identified.

3.3.4. More work will need to be undertaken to further develop these efficiencies when the pandemic eases.

3.4. New Expenditure Pressures

3.4.1. New expenditure pressures are the combinations of additional cost to meet existing service needs e.g. increased client base/greater service take up and the costs of meeting change in service provision e.g. policy changes.

3.4.2. The original budget outlook report included £5.5 million per annum to meet growth pressures.

This year, an extraordinary level of initial growth bids were received from departments, exceeding £30 million. Based on an evaluation of the value and unavoidable nature of pressures submitted as well as additional funding identified through grants as explained in paragraph 2.5 above, core funding for specific pressures totalling £12.5 million have been funded (plus the NI increase of £2.7m reference in Para 3.2.4).

For this budget round, social care pressures in particular have been at an unprecedented level:

- Funding required for the National Living Wage increase is significantly increased, as the Chancellor's announcement of £9.50/hour was much higher than expected (the figure forecast by the Office of Budget Responsibility). The Welsh Government has raised this even further with the commitment to raise pay in the care sector above the foundation living wage – currently £9.90/hour. Even with baseline inflation set at 4%, this adds a further £3.9 million to inescapable pressures.

Last year's budget papers foresaw that to achieve increasingly challenging statutory Welsh Government recycling targets, changes to the waste collection methodology in the coming years would be required. This budget includes a sum of £1.3 million towards this, which will also contribute towards the decarbonisation agenda.

3.4.3 The minister's letter explicitly instructs Local Authorities to assess the future financial risk of COVID19 and provide for it from the improved settlement. Carmarthenshire's total hardship claims since the start of the pandemic exceeds £50 million and we are currently claiming between £2-3 million per month. With the current uncertainty surrounding the Omicron variant, making any reliable assessment is almost impossible, and providing ongoing funding is frankly impossible given the scale of pay pressures and inflation. Given these issues, this budget strategy increases our existing Contingency budget of £1million to £2 million and adds a separate fund to recompense income loss from services, which is highly likely to be drawn in full over the year. This provides total covid corporate contingency of £3

million. In addition, there remains a dedicated £500k social care contingency within the base budget of Communities department. Should these be insufficient, the Authority would need to critically assess its reserves and forward commitments, with the first call being the review of uncommitted future capital schemes.

In total, pressures funding adds £12.5 million to the budget. The detail is provided at **Appendix B**.

3.5. Schools Delegated Budgets

3.5.1 Over recent years, our MTFP has provided in full for known pressures to school budgets including inflationary costs and pay awards. Whilst school balances increased significantly this year, this represented one off grant funding to support covid recovery and raising standards following the impact of COVID-19 on learners and the education system overall. Our current forecast is that nearly £5m of this will be drawn down this year. We have had recent indications from WG of additional funds, much of which is likely to be carried forward into next year. Whilst this will again enhance school balances this year, it is for specific activities, including repairs and maintenance, and is again only temporary in nature.

Against this backdrop, we have maintained the existing approach, including funding for pay award increases, inflation on non-pay budgets and the assumed extraordinary increase in energy prices.

Members should note that as outlined in paragraph 2.5 above, the RRRS grant (which was not expected to continue) and increased ALN grant, provides a further £2.4 million. In total, Education and Children's Services budgets will see increased funding of c. £11 million.

3.6. Internal Funding

3.6.1. Generally speaking whilst the use of reserves to support annual budgets should not be summarily discounted, it must be treated with caution. Funding on-going expenditure from such funds merely defers and compounds difficult financial problems to the following year. One-off items of expenditure within any budget proposal lend themselves better for such funding support.

3.6.2. In deliberating this point however, members must bear in mind any **inherent risks** that may be built into the budget strategy. These include:

- Uncertainty around the true economic impact of the new trading arrangements with Europe, which seem to evidently be impacting on commodity costs
- The pace of deployment and efficacy of Covid-19 vaccine upon the need for continuing public health restrictions
- Future inflation/interest rates
- The timing and severity of fiscal or expenditure measures brought in by Westminster Government to balance public sector finances.
- Additional pressure on demand lead Services

In addition it should be noted that whilst, for the first time in a number of years, Welsh Government have been able to provide indicative core funding allocations for 2023/24 and 2024/25, they are only indicative at this point in time and will be subject to change.

3.6.3. The following table summarises the main categories of reserves held by the Authority.

	1 st Apr 2021 £'000	31 st Mch 2022 £'000	31 st Mch 2023 £'000	31 st Mch 2024 £'000
Schools Reserves	7,266	2,525	2,525	2,525
General Reserves	12,034	12,813	12,813	12,813
Earmarked Reserves	114,805	76,484	55,294	50,941

3.6.4. School Reserves

- Schools have delegated responsibility for the management of their own finances. The level of reserves held by an individual school at any point in time will depend on a number of factors including the level of contingency fund that the school governing body considers appropriate, and the particular plans each school has for expenditure. Officers have yet to be informed of any transfers to/from these reserves by individual schools for future years.
- Legislation allows schools to carry forward reserves from one financial period to another. The School Funding (Wales) Regulations 2010 requires schools to limit their accumulated

reserves at year end to £50,000 for Primary Schools and £100,000 for Secondary and Special Schools or 5% of their budget dependent on what is greater. School Improvement officers are currently working with schools to ensure they comply with the guidance. As at 31st March 2021, 23 primary, 4 secondary and 1 special schools were in deficit.

3.6.5. General Reserves

- In the changeable and challenging environment currently facing Local Government the Authority is committed to maintaining a reasonable level of General reserves or Balances. Whilst there is no prescribed minimum level for Balances, Council has previously deemed 3% of net expenditure as being a prudent level, which has been accepted by our Auditors as being reasonable
- The overall level of balances is taken into consideration each year when the annual budget is set and has on occasions been utilised to augment expenditure/reduce council tax. The 2021/22 budget was set on the basis of no transfers from the General Reserves. Based upon the October Budget monitoring (outlined in paragraph 3.1.2 above) there could be a small increase of £779k to General Reserves and a fall of £4.7 million on school balances at the end of the current financial year.
- Given the ongoing impact of the pandemic response on our budgets and the uncertainty of continued WG support into next year, it is deemed imprudent at this stage to assume any further support for future years budgets from the current General Reserves.

3.6.6. Earmarked Reserves

- The Authority holds earmarked reserves which have been set up to finance the delivery of specific projects, or in protecting the authority

against future liabilities or issues. The reserves can be summarised as follows:

Reserve	31 March 2021 £'000	31 March 2022 £'000	31 March 2023 £'000	31 March 2024 £'000
Insurance	12,906	13,658	14,908	15,658
Capital Funds	51,944	19,348	12,440	13,867
Development Fund (inc. Schools Dev Fund)	940	1,075	2,195	2,249
Corporate Retirement Fund	5,276	4,276	3,276	2,276
Joint Ventures	1,427	1,359	1,325	1,276
Other	42,313	36,769	21,151	15,616
TOTAL	114,805	76,484	55,294	50,941

- As can be seen from the table above the level of earmarked reserves fluctuates greatly year on year, and whilst the level in each fund is not an exact science it is based on an informed estimate and past experience of the likely call on the authority in future years in line with the intended purpose of each reserve. Great care must therefore be taken when considering utilising such funds for purposes other than those which they were created as this could lead to the authority being faced with substantial unfunded liabilities in the future
- The budget proposals therefore assume nil contribution from reserves in support of the revenue budget in 2022/23 and a further analysis of the reserves held will be undertaken over the coming months with any further proposed utilisation being considered at the budget finalisation stage.
- Taking account of the proposals within this report, the Director of Corporate Services confirms that overall the estimated level of financial reserves (as indicated above) is adequate for the financial year 2022/23, with the General Reserves being at the appropriate level in line with guidelines and good practice, but is also very conscious of the significant risks of this Budget Strategy and the ongoing Pandemic.
- The Director is also very conscious of the ongoing commitment to capital projects and of

the demand on future services and therefore feels the reserves will need to be monitored closely going forward.

4. IMPACT ON THE AUTHORITY'S BUDGET STRATEGY

The table below provides an updated position on the current financial outlook taking account of the provisional settlement and also other recent validation changes.

4.1. The Current Financial Outlook (updated for the Provisional Settlement) is set out in the table below:

	Current MTFP		Proposed Financial Model		
	2022/23 £'000	2023/24 £'000	2022/23 £'000	2023/24 £'000	2024/25 £'000
Previous Year's Budget	386,185	396,609	386,185	417,799	432,744
General Inflation	2,278	2,730	6,423	5,314	3,266
Pay Inflation	6,287	6,271	9,804	6,212	6,307
Transfers in & other*	1,568	1,642	5,923	1,827	1,298
Growth	5,500	5,500	12,544	5,500	5,500
Savings proposals	-4,644	-4,093	-3,839	-3,908	-3,982
Further savings to be identified	-565	-1,240	nil	nil	nil
Funding unallocated	nil	nil	757	nil	nil
Net Expenditure	396,609	407,419	417,799	432,744	445,133
Funded by:					
Revenue Settlement	290,517	296,327	311,597	322,503	330,243
Council Tax Receipts	106,092	111,092	106,202	110,241	114,890
Council Tax Increase:	4.35%	4.40%	4.39%	3.42%	3.84%

*includes funding allocation to Covid Contingency (paragraph 3.4.3)

4.2. The total of budget reductions now required for 2022/23 is £3.8m and for the 3 year period are estimated at £12m.

4.3. The 2022/23 draft budget currently includes a contingencies totalling £3.5m in respect of additional expenditure and income loss due to COVID19. The level of risk or uncertainty will continue to be assessed

should there be either additions required or reductions possible as part of the final budget setting and will then be continually monitored during the year.

4.4. The 2022/23 budget contains £757k which is as yet unallocated, which will allow members scope to consider additional information forthcoming in respect of:

4.4.1. Responses to the consultation process

4.4.2. Clarification of specific grants

4.4.3. Further growth pressures not currently addressed

4.4.4. Changes in the assessed implications of the Pandemic

4.4.5. Changes arising from the final settlement

5. CONSULTATION

Budget consultation has been planned for the coming month and a summary of the individual approaches are as follows:

5.1. Members seminars. (17-21 January 2022)

5.2. The consultation process will commence from 17 January 2022.

5.3. Town & Community Councils and commercial ratepayers consultation in January 2022.

5.4. Consultation with Scrutiny Committees during January & February 2022.

5.5. Consultation with the Schools Budget Forum on 24 January 2022.

5.6. Trade Union Consultation meeting on 26 January 2022

6. WELLBEING OF FUTURE GENERATIONS (WALES) ACT 2015

6.1. In considering the budget proposals, members need to take into consideration the requirements of the Wellbeing of Future Generations (Wales) Act 2015. The Act requires that we must carry out sustainable development, improving the economic, social environmental and cultural well-being of Wales.

‘... the public body must act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs’

6.2. In doing so, we must demonstrate the following 5 ways of working:

- Looking at the long-term so that we do not compromise the ability of future generations to meet their own needs

- Understanding the root causes of the issues to prevent them recurring
- Taking an integrated approach so that we look at all well-being goals and objectives of other services and partners
- Collaboration – Working with others in a collaborative way to find shared sustainable solutions
- Involving a diversity of population in decisions that affect them

6.3. Carmarthenshire’s Well Being objectives were updated in April 2021:

Start Well

1. Help to give every child the best start in life and improve their early life experiences
2. Help children live healthy lifestyles

Live Well

3. Support and improve progress, achievement, and outcomes for all learners
4. Tackle poverty by doing all we can to prevent it, help people into work and improve the lives of those living in poverty
5. Create more jobs and growth throughout the county
6. Increase the availability of rented and affordable homes
7. Help people live healthy lives (tackling risky behaviour and obesity)
8. Support community cohesion, resilience and safety

Age Well

9. Support older people to age well and maintain dignity and independence in their later years

In a Healthy and Safe & Prosperous Environment

10. Look after the environment now and for the future
11. Improve the highway and transport infrastructure and connectivity
12. Promote Welsh Language and Culture

Corporate governance

13. Better Governance and use of Resources

7. CONCLUSION

- 7.1.** Currently the budget proposals assume the full delivery of all of the savings proposals submitted.
- 7.2.** Work needs to be undertaken to further develop the cost reductions for years 2023/24 and 2024/25 to be able to maintain the current Budget Strategy and level of council tax. Departments will be working over the forthcoming year to refine these savings.
- 7.3.** It is recognised the critical importance of minimising the Council Tax increase for our residents whilst maintaining a balanced budget in these unprecedented and challenging times.
- 7.4.** Given the current risks around this Budget Strategy and the ongoing significant impact of the pandemic. Council Tax increases have been maintained at the previous MTFP level of 4.4% for next year, with the savings identified in years 2 and 3 leading to indicative Council Tax increases of 3.4% and 3.8% respectively. This provides at least some mitigation to the savings proposals which the council needs to consider over future years of the Medium Term Financial Plan.
- 7.5.** Over the coming weeks and part of the refining of the Medium Term Financial Plan where the Authority gets further clarification on costs and grant funding and feedback on the consultation, the Authority will aim to limit the Council Tax increase as far as possible.

8. RECOMMENDATION

- 8.1.** That Cabinet:
 - 8.1.1.** Note the contents of the report and approve the three year Budget Strategy as a basis for consultation. Specifically seeking comments from consultees on the efficiency proposals in Appendix A.
 - 8.1.2.** Note the unallocated sum of £757k in the current strategy, which will be given further consideration at the completion of the consultation as noted in paragraph 4.4.
 - 8.1.3.** Approve the proposal to allocate £500k from forecast current year underspends to accelerate our Decarbonisation plans in the forthcoming year.

	ORIGINAL SAVINGS TARGETS			
	2022/23	2023/24	2024/25	Total
	£'000	£'000	£'001	£'000
Chief Executive	432	443	417	1,292
Education & Children	904	925	872	2,701
Schools Delegated	-	-	-	0
Corporate Services	180	184	174	538
Communities	2,471	2,530	2,383	7,384
Environment	1,222	1,251	1,178	3,651
	5,209	5,333	5,024	15,566

Proposals					EXISTING POLICY PROPOSALS				NEW POLICY PROPOSALS				TOTAL PROPOSALS													
	MANAGERIAL				2022/23	2023/24	2024/25	Total	2022/23	2023/24	2024/25	Total	2022/23	2023/24	2024/25	Total										
	2022/23	2023/24	2024/25	Total													£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
	£'000	£'000	£'000	£'000													£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Chief Executive	399	282	269	950	0	0	0	0	0	0	0	0	0	0	0	399	282	269	950							
Education	538	405	140	1,083	50	250	252	552	115	0	0	115	703	655	392	1,750	703	655	392	1,750						
Schools Delegated	0	0	0	0	0	270	480	750	0	0	0	0	0	270	480	750	0	270	480	750						
Corporate Services	180	180	75	435	0	0	0	0	0	0	0	0	180	180	75	435	180	180	75	435						
Communities	1,703	2,232	1,980	5,914	0	0	0	0	0	0	0	0	1,703	2,232	1,980	5,914	1,703	2,232	1,980	5,914						
Environment	834	259	776	1,869	20	30	10	60	0	0	0	0	854	289	786	1,929	854	289	786	1,929						
	3,654	3,358	3,240	10,251	70	550	742	1,362	115	0	0	115	3,839	3,908	3,982	11,728	3,839	3,908	3,982	11,728						

	SHORTFALL VS ORIGINAL TARGETS			
	2022/23	2023/24	2024/25	Total
	£'000	£'000	£'000	£'000
Chief Executive	33	161	148	342
Education & Children	201	270	480	951
Schools Delegated	0	-270	-480	-750
Corporate Services	-0	4	99	103
Communities	768	299	403	1,470
Environment	368	962	392	1,722
	1,371	1,426	1,042	3,838

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Chief Executive							
Chief Executive, Business and Executive Support	237	Office of the Chief Executive, business and executive support	20	20	19	59	£20k for <u>22/23</u> Reduction in supplies, eg. photocopying / postages / vehicle hire & others. <u>23/24</u> and <u>24/25</u> can only be met by reducing the staffing structure within the service
Information Technology	4,088	ICT Services underpins and contributes towards all that the Council delivers both internally as an organisation and externally to service users and communities, independently or in partnership. It is a vital function providing innovative opportunities for improving services and achieving our priorities in an efficient and effective way. IT Services is pivotal as an enabler of change and a vehicle for driving forward transformational improvement to all services. As we continually strive to deliver our solutions in an efficient manner and in line with our key Digital Strategies (Digital Transformation Strategy, Digital Technology Strategy, Digital Schools Strategy) our major savings in future years however will have to be found from our staffing budget. The work the service does significantly contribute to financial savings being delivered from revenue budgets held across the Authority by other service areas.	115	118	111	344	<u>2022/23</u> will be met by reduction in travel and stationery (£20k) along with staff redundancies via an EVR process (£95k). <u>2023/24</u> (£118k) and <u>2024/25</u> (£111k) can only be delivered by a reduction in the workforce. This will have a significant impact on our ability to delivery the key priorities of our Digital Transformation, Digital Technology and Digital Schools Strategy. Any posts lost from Corporate Policy will impact on our ability to lead and drive forward key corporate Initiatives. We would re-run the EVR request as a means to facilitate the delivery of this efficiency if no posts have become vacant in due course.
Statutory services / Coroners	372	The Coroner is an independent Judicial Officer and discharges his duties in accordance with the Coroners Act 1988. He has a duty to investigate deaths reported to him where he has reasonable cause to suspect that the death was violent, unnatural or of unknown cause or which occurs in prison.	18	0	0	18	Although efficiencies can be identified in the Coroner budget, the following must be highlighted: JNC for Coroners' pay has been agreed - 1.5% pay rise for 2021/22 with effect from 1st April 2021. Current budget can cover this. 2021-22 and 2022-23 will see one jury inquest with costs of approx £100k. Current review of amalgamation of the jurisdiction of Pembrokeshire/Carmarthenshire with Swansea/Neath Port Talbot is being picked up again post COVID, unknown at present whether this will cost more to Carmarthenshire or less.
Member Travel & Printing			27	0	0	27	Reduction in Travel & Printing following implementing of paperless meetings and Hybrid Meetings
People Management division	2,767	Includes Payroll, People Services, Organisational Development, Employee Wellbeing , HR Development Team, Business and Project Support	67	68	65	200	Focus is going to be on delivering the targets based on the realignment of OD, together with some additional income generation right across the division, this proving to be difficult as only have the staffing budgets to yield the efficiencies, and that is becoming more difficult as each year passes.
Regeneration division	3,542	Regeneration is a key priority for the council. The Division provides Business, employability, grant funding and skills support and advice. We also deliver physical regeneration projects throughout the county, including the Swansea Bay City Deal Pentre Awel Life Science and Wellness Village planned for Delta Lakes. The Regeneration Division is responsible for the management of land assets (those within the economic/commercial portfolio) of the Council, taking a strategic commercial view to ensure the portfolio is managed to meet the Council's economic development needs. The Division is also responsible for the delivery of the Council's Net Zero Carbon agenda.	70	30	30	130	<u>2022/23 Total £70k</u> . £20k - Anticipated increase in Income/reduction in operating costs on Administrative estate through New Ways of Working. £25k anticipated decrease in utility costs on administrative estate due to reduced occupancy through continued agile working. £10k reduction in community grants. £15k supplies within industrial estate budget. <u>2023/24 £30k</u> additional rental income from Swansea University Parc Dewi Sant. <u>2024/25 £30k</u> anticipated increase in income / reduction in operating costs on admin estate through new ways of working
Marketing & Media	1,914	Business Unit comprising of translation, marketing and tourism, contact centres, customer services, press and communications.	45	46	44	135	<u>2022/23 £45k in total</u> . £20k reduction in event support scheme, we will look at better ways of helping communities develop their events through advice and promotion. £5k reduction in Tourist Information Centre costs as we hand back Castle House and relocate to the Hwb/Debenhams. £20k tourism marketing - reduction in printing and advertising. <u>2023/24 £46k</u> we would be looking at finding a large percentage of this within the translation service and in generating an income for services such as design, advertising and translation. <u>2024/25 £44k</u> - this can only be met by reducing staffing costs, this undoubtedly will have an impact on the work that we as a team deliver for the Council.
Departmental travel as per Transformation Innovation Change team exercise		Cross departmental travel costs	17	0	0	17	£17k reduction in departmental travel budgets
Departmental printing as per Transformation Innovation Change team exercise		Cross departmental printing costs	20	0	0	20	£20k reduction in departmental printing budgets
Chief Executive Total			399	282	269	950	

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Education & Children							
Director & Management Team							
Business support Unit	408	Department Business support unit based at Parc Dewi Sant	50			50	Due to realignments which have changed the structure and workloads within the BSU a vacant post will not be filled.
Departmental - cross cutting	various across the dept	Cross-departmental support costs including administration, financial processing, & premises management	150	130		280	Reprofiled to allow implementation of programme due to link with school rationalisation. Root & branch review of support services across the Department in order to realise savings and increase flexibility
Departmental - cross cutting	various across the dept	Cross-departmental support costs including administration, financial processing, & premises management	100	125		225	BWOW, post covid, online conferences, travel
Total Director & Management Team			300	255	0	555	
Access to Education							
Catering Services	1,701	<ul style="list-style-type: none"> The Catering Service provides school meals in all Carmarthenshire schools. Based on current charges for a primary school meal, Carmarthenshire prices are the joint highest in Wales. Costs have been saved over recent years by reducing staffing levels and smarter purchasing of food and other supplies The budget is for the provision of Free School Meals for eligible pupils with the paid meals being funded by income. The school meals service currently has a production kitchen (full kitchen facilities) in almost every school with a few having meals brought in from another school, where the receiving school has a dining centre arrangement. 		100	140	240	Reduced number of school kitchens subject to the progress of school rationalisation and review the need for full kitchen facilities at school sites.
Total Access to Education			0	100	140	240	
Education Services & Inclusion							
School based Early Voluntary Retirement / redundancy (funded centrally)	233	Schools are currently provided with budget to fund Teaching Assistants (TAs) for pupils with a statement of educational need. If the pupil moves school, the TA can be redundant as they have been employed by a specific school.	0	50		50	Schools have been asked to communicate with the LA any projected redundancies. The Change Review Panel, will work closely with schools in an effort to re-deploy staff, thus avoiding any avoidable redundancy costs.
School Improvement	36	Release of Canolfan Griffith Jones training centre	25			25	BWOW, utilising Neuadd y Gwendraeth and on line courses removing requirement for facility
Consortia Arrangements School improvement	1,107	ERW into new partnership	50			50	As ERW is disbanded and the new partnership is evolving it is expected that there will be a reduced core contribution required from each LA
Total Education Services & Inclusion			75	50	0	125	
Curriculum & Wellbeing							
Music Service	309	Carmarthenshire Music Service provides: weekly tuition to c.6000 children and young people across Carmarthenshire; curriculum teaching in line with requirements of the statutory national curriculum; access for pupils to perform in a wide range of instrumental and vocal ensembles; support for school concerts and other school-based events; opportunities for pupils to perform outside the county; access for more able and talented performers to represent the county at consortium and national level; access for over 4,000 pupils annually to attend the peripatetic teachers' concert tour; access to a bank of centrally held resources and equipment e.g. musical instruments, recording equipment etc; facilities to record and produce CDs of school and music service performances.	13			13	Travel Reductions
Total Curriculum & Wellbeing			13	0	0	13	
Children's Services							
Garreglwyd ASD Residential Setting	444	Provision of residential care for children aged 11-19 who are autistic and have very complex needs at Garreglwyd Special Residential Unit.	150			150	The intention is to generate income at Garreglwyd from the sale of beds / residential places to neighbouring Authorities. There will be 2 spare places / beds from April 2022, which should generate sufficient income to meet the identified efficiency saving if sold at market rate.
Total Children's Services			150	0	0	150	
Education & Children Total			538	405	140	1,083	

Corporate Services

Financial Services

PRE LGR Pension Costs	1,860	Cost of Pre LGR Pension Costs	100	100	50	250	Reduction in call on budget over time
Bank Charges	68	Cost of Authority's Banking arrangements	5	5	0	10	Reduction in bank charges following negotiation of new contract

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Treasury & Pensions Section	70,287	Provision of a Treasury Management and Pension Fund Investments Service including statistical and legislative research and development work. The unit manages the strategic direction, formulates and implements Policy and Strategy and ensures the integrity of the Dyfed Pension Fund. The unit also manages the Dyfed Welsh Church Fund and Banking Services	0	15		15	Increase in external SLA income for work undertaken for Wales Pension Partnership
Corporate Services Management Team	360	Departmental costs of Director, Head of Finance & Direct Support	10	0	0	10	Increase in external SLA income for work undertaken for Wales Pension Partnership
Accountancy	1,281	The provision of a decentralised accounting and financial management service, covering: <ul style="list-style-type: none"> • Technical Accounting (Preparation of final accounts, corporate accounting and taxation), • Management Accounting (Month end close, maintenance of financial records and budgeting) • Strategic Finance functions (projects, planning and financial advice to members) 	0	0	25	25	Increase in external SLA income for work undertaken for Llesiant Delta Wellbeing
External Audit Fees	229	Cost of external audit fees	10	10	0	20	Reduction in external audit cost by maximising audit costs chargeable against grant schemes
Total Financial Services			125	130	75	330	
Revenues & Financial Compliance							
Rates Relief	328	Cost to CCC of properties that are eligible and have successfully applied for discounts on their business rates	50	50	0	100	Demand is currently less than current budget provision
Total, Revenues and Financial Compliance			50	50	0	100	
Corporate Services General							
General	12	Staff Travel	5	0	0	5	Reduction in staff travel by utilising technology
Total Corporate Services General			5	0	0	5	
Corporate Services Total			180	180	75	435	

Environment

Highways & Transport

Parking Services	(£1,066)	The County Council provides off street car parking facilities in towns and villages to support the expeditious movement of traffic to enable town centres to function. Parking supports these wider transport policy objectives and enables the authority to maintain highway and public transport services. There are 57 car parks across the county.	125	0	0	125	Parking services increase planned April 2020, but effected January 2021. Parking income is vulnerable due to the economic impact of COVID19, we can anticipate that income will reduce for the next 12 - 24 months. The charges will increase as approved but income will fall overall. It is difficult to predict the long-term impact of covid on town centres and therefore parking income.
Parking Services	(£1,066)	The County Council provides off street car parking facilities in towns and villages to support the expeditious movement of traffic to enable town centres to function. Parking supports these wider transport policy objectives and enables the authority to maintain highway and public transport services. There are 57 car parks across the county.	62	0	0	62	Introduce Charges to additional car parks
Highways - town centre management	19	Town Centre Management Budget (Minor structural works, paved areas, bollards, street furniture) reductions will further increase risk to safety.	19	0	0	19	Cease the proactive maintenance work by moving to reactive repairs only in town centres. There may be opportunities for increased maintenance when grant funding could be utilised otherwise there is a possibility that town centre furniture will have to be removed.
Highways	365	Carmarthenshire has the second largest highway network in Wales (3482 Km of highway) and is more than double the Welsh average of 1578km. We have the third highest traffic volume in Wales - in 2018 the Wales average was 1.33 billion vehicle km/per year and Carmarthenshire were third at 2.06 billion (Cardiff 3.0 and RCT at 2.15 were highest). Our 3500km highway network is subject to many external influences which cause the asset to deteriorate such as weather impacts and traffic loading. There is a backlog of carriageway maintenance works in Carmarthenshire equating to £36 million, reductions will further increase risk to safety.	30	0	0	30	Reduce General Maintenance Budget - subject to the financial position remaining unchanged the service will be forced to further reduce the level of general maintenance work.
Depot rationalisation	various across the dept	Depot infrastructure to support the delivery of front line services.	0	0	140	140	Depot rationalisation

DEPARTMENT	2021/22	FACT FILE	2022/23	2023/24	2024/25	Total	EFFICIENCY DESCRIPTION
	Budget £'000		Proposed £'000	Proposed £'000	Proposed	£'000	
Public Rights of Way	443	The Countryside Access Team has responsibility for the Definitive Map and Statement of Public Rights of Way in Carmarthenshire which is the conclusive legal record. Public Rights of Way include footpaths, bridleways, restricted byways and byways open to all traffic. There are urban and semi-urban routes in towns and villages but much of the 1,500 mile network is out in the countryside crossing fields, farmland and open country. It's a fantastic leisure and recreational resource for the people of Carmarthenshire and visitors to the County with the Wales Coast Path and numerous other walking/riding and cycling routes on offer. Enforcement and legal issues associated with the implementation of the Rights of way Improvement plan.	4	0	0	4	Reduce PRow vehicles by 1
Service reconfiguration	net divisional budget of £21M	The strategic leadership, management, development and delivery of transport and engineering services for the Authority.	20	0	0	20	Divisional Service Reconfiguration - subject to the financial position remaining unchanged the service will be forced to reduce the level of staffing resource with the consequential impact on service.
Road Safety	184	The Road Safety Unit is responsible for delivery of road safety initiatives to meet road casualty reduction targets. The unit has responsibility for road safety education, training and publicity, the School crossing patrol service, national driver improvement schemes and road safety outside schools.	5	5	0	10	Road Safety Innovation - the service will develop income streams and sponsorship.
Road Safety and Traffic Management	512	The Traffic Management, Road Safety and Parking Business Unit investigates and strives to prevent road accidents by utilising a mix of engineering, education and enforcement interventions across Carmarthenshire. With the third highest traffic volumes in Wales, managing the expeditious movement of traffic and improving road safety on the second highest length of road network in Wales, requires prudent management of a limited resource.	88	10	0	98	Increased income from Road Closures due to increased utility activity , this will be kept under review for future years due to its reactive nature. We don't know what level of utility works will be taking place in future years. If there's a downturn then our income will drop.
Streetworks and Adoptions	65	Co-ordination and management of all works affecting public highways in accordance with the Traffic Management Act - including utility works. Supervision of new housing estate roads in preparation for future adoption by Carms County Council under section 38 of the Highways Act.	15	0	0	15	Increased Income from permitting
Highways - stopping up orders	-5	Stopping Up Orders are made when sections of the existing highway become redundant. This happens for example when a road improvement is undertaken, land within the extent of the original highway limit that has become redundant is then stopped up via a legislative process and reverts to the landowner. Where there is a formal request received from a landowner to Stop Up an area of highway land, the proposal is to charge the respective landowner the associated costs for undertaking this work.	3	3	0	6	Stopping Up Orders
Design	-583	The Engineering Design Unit is responsible for the design and delivery of infrastructure Projects. Projects are diverse and range from small traffic management and passenger transport schemes through to new road constructions projects such as the Cross Hands Link Road. Engineering Design provides Engineering advice corporately across all departments of the authority. It also manages the 'Gateway' function for Regional frameworks for both Engineering Design and Engineering Contractors Frameworks.	30	0	0	30	Income Generation
School Transport	4,473	Provision of home to primary/secondary/special schools transport in accordance with statutory obligations. Provision of transport in the post-16 sector is a discretionary service. Provision of passenger assistants for pupils with Additional Learning Needs	0	30	110	140	Additional Needs Personal Travel Budgets
Property Design	-328	The property design, procurement and project management service, including regional design frameworks. Management and delivery of projects.	81	0	0	81	Additional income generation based on in-house expertise available to public sector partners and other markets as appropriate.
Asset Utilisation	various across the dept	Use of vehicles and plant with service users.		10	98	108	Client Budget reductions***. Invest to save
Total Highways & Transport division			482	58	348	888	

Planning

Development Management	758	<ul style="list-style-type: none"> The Development Management Unit manages the statutory planning application process (including pre-application and also discharge of conditions and variation of conditions post approval). The Unit deals with between 1700 and 1900 applications on average each year (roughly 150 cases per annum per Officer). The unit is also responsible for planning enforcement matters including enforcement of planning conditions and unauthorised development and built conservation matters, dealing with roughly 500 cases per annum. 	10	0	0	10	Additional predicted income from new statutory pre-application service.
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DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Divisional review	net divisional budget of £3M	• Budget covers Head of Service functions along with business and administrative support to all functions within the Planning Division including: Development Management & Built Heritage (incl. Enforcement); Building Control, Rural Conservation, Waste and Minerals, Forward Planning (Development Plans) .• Functions include general research and policy work, publishing and printing, business planning, budget planning, orders and payments, monitoring, health and safety, IT systems and licenses, general procurement.	87	35	0	122	Review of divisional management arrangements & structure
Total Planning division			97	35	0	132	
Property							
Property Maintenance	2,593	This division is responsible for the day-to-day and long term repairs & maintenance of the council's estates including schools, administrative buildings, depots etc.	98	0	0	98	Over 98% of the budget for the Property Division comprises the Revenue Maintenance Budget. Efficiencies are proposed to be met through reducing expenditure on revenue maintenance across the Council's buildings following disposal of some properties and previous capital improvements undertaken to others. We are also aiming to make savings through new procurement arrangements and seeking to in-source areas of work where it is more cost effective than using external contractors or consultants.
Total Property division			98	0	0	98	
Waste & Environmental Services							
Reduction Black bag waste	6,988	Targeted campaigns to reduce waste and increase the awareness and use of all recycling schemes/initiatives. It is anticipated that this will result in the diversion of waste from the residual waste stream to the recycling waste stream, thereby realising savings due to the differential in the treatment costs as set out.	35	35	150	220	Anticipated savings due to differential in gate fee between blue bag and black bag treatment as a result of proposed kerbside black bag restrictions.
Bring sites - Operational	419	Bring sites are located across the County to provide recycling facilities within communities. They currently cater for glass deposits.	37	37	0	74	Potential to reduce the number of service vehicles due to fewer Community Bring Sites being operated. The saving will be phased over two financial years to reflect the introduction of kerbside glass collections from October 2022 with half the saving in 22/23 and the balance in 23/24.
Waste Services - operational	2,926	The operational budget includes for the provision of resources, including vehicles and premises to effect the kerbside waste collection service.	0	0	200	200	Review of waste rounds and depot utilisation, subject to the conclusions of the kerbside collection methodology review. This will be dependent on the agreed direction of the Waste Strategy and the phasing and rollout of the new services.
Closed Landfill	257	We currently manage the ongoing aftercare at two former refuse landfill sites - Nantycaws (Phase 1) in Carmarthen and Wern Ddu in Ammanford. This includes dealing with leachate from the landfill sites and ensuring the adequacy and functionality of the infrastructure, including drainage systems.	5	5		10	Reduction in maintenance of infrastructure.
Cleansing	2,571	The County Council maintain over 3,500km of roads throughout the County. The Cleansing Service provides for the sweeping and de-littering of streets and footways. The service includes mechanical sweeping of highways, footways and pedestrianised town centre areas, hand litter picking and emptying bins, chewing gum removal, graffiti and illegal poster removal, clearing up illegal dumping of rubbish and dog mess.	0	69	33	102	Phased rationalisation of plant (sweepers) and labour (agency). Savings identified for 22/23 have been netted off against a need for additional resource to combat fly-tipping as identified in the Audit Wales report on Waste. Hence growth bid has been negated.
Flood defence	358	Design, construction, maintenance, repair and management of flood defence works. Investigation of causes of flooding.	20	15	15	50	Reduction in maintenance work and small scale repairs on flood defence assets such as trash screens and control valves.
Coastal Protection	62	Design repair and maintenance of Coastal Protection Schemes.	5	0	0	5	Reduction in reactive maintenance work and small scale repairs on flood defence assets such as repairs to walls, structures and outfalls.
Environmental Enforcement	549	The Environmental Enforcement section is responsible for providing enforcement activity in relation to environmental crime. This includes matters relating to dog fouling, litter, fly tipping, waste carrier offences, domestic and business waste offences, abandoned vehicles, anti-social behaviour for example graffiti, highways offences and skips and scaffolding. Enforcement is effected by means of formal notices, fixed penalty fines and prosecutions.	5	0	25	30	22/23 - £5k reduction in promotional materials and consumables. 24/25, potential income generation and / or SLA agreements with neighbouring authorities
Grounds maintenance - Reduced sub-contractor work	1,216	The Grounds Maintenance Section incorporates the direct responsibility of managing and maintaining parks and playgrounds, inland water areas and a large number of public open spaces within Carmarthenshire. It also maintains grounds for many other departments of the County Council such as Social Care and Housing, Cultural Services, Education and many individual schools. The Section also has numerous external clients such as Town and Community Councils and private sports clubs.	20	5	5	30	Reduce the reliance on sub-contractors through greater internal efficiencies.

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Review of staffing	net divisional budget of £22M	The budgets that make up the management structure of the Waste and Environmental Services staffing structure.	30	0	0	30	Review management structure.
Total Waste & Environmental Services			157	166	428	751	
Environment Total			834	259	776	1,869	

Communities

Leisure

St Clears Leisure Centre	109	There are 6 Leisure Centres in operated by the Council in Carmarthenshire: Llanelli, Carmarthen, Ammanford, Llandovery, St Clears and Newcastle Emlyn. A variety of activities take place at these centres such as: Swimming, Diving, Canoeing, Fitness, Cycling, Badminton, Tennis, Table Tennis, Squash, Hockey, Netball, Basketball, Football, Rugby, Cricket, Gymnastics, Birthday Parties, Holiday programmes. There are normally over a million visits to the Leisure facilities annually Typically our Leisure facilities attract over a million per annum, collecting £4m in income. 2020/21 has seen usage numbers and income crippled to around 25% of normal levels as the coronavirus lockdown and restrictions affect trading. A new Actif Anywhere online service has been launched to compliment the physical offer at sites during this unprecedented period.	0	37.5	0	38	Improve operating efficiency of St Clear's Leisure Centre as part of strategic review. Overall controllable operating budget is £108,589
Outdoor Education	188	Pendine Outdoor Education Centre caters for up to 120 residential visitors at any given time, with a particular focus on primary school provision for Carmarthenshire schools. The experience is often the first opportunity for some young children to experience being away from home on a residential basis, however, the age of the infrastructure on site is of concern for the future.	20	50	0	70	Improve operating efficiency of Outdoor Education Centres pending new strategic plan.
Franchise Lettings	0	An indoor and outdoor high quality, year-round visitor destination that aims to maximise Pendine's heritage and its natural assets to drive forward the resort's future economic regeneration as a 'day and stay' event destination	25	50	0	75	Improved income streams from franchise lettings across whole service.
Increased Parking income	0	Increased parking income at coastal car parks and potential development of motorhomes sites	15	15	15	45	Increased parking income at coastal car parks and potential development of motorhomes sites
Country Parks	-61	Pembrey Country Park is one of the most visited outdoor facilities in Carmarthenshire and Wales, regularly attracting around half a million users annually. Whilst usage numbers have fluctuated this year with lockdowns and restrictions, the park was busier than ever during August, highlighting the value people put on great and safe outdoor spaces. The park has an 8 mile beach, a 320 pitch caravan and camping site, 550 acres of woodlands, a 130m long dry ski slope and toboggan run in Wales, along with a new Crazy Golf course, 9 hole pitch and putt facility, a miniature model steam railway, a riding centre, and the National Closed Road Cycle circuit and pump track.	12.5	25	50	88	Increased Pembrey Country Park / Campsite income - Invest to Save / capital for additional income generating activities
Leisure Centres	488	There are 6 Leisure Centres in operated by the Council in Carmarthenshire: Llanelli, Carmarthen, Ammanford, Llandovery, St Clears and Newcastle Emlyn. A variety of activities take place at these centres such as: Swimming, Diving, Canoeing, Fitness, Cycling, Badminton, Tennis, Table Tennis, Squash, Hockey, Netball, Basketball, Football, Rugby, Cricket, Gymnastics, Birthday Parties, Holiday programmes. There are normally over a million visits to the Leisure facilities annually Typically our Leisure facilities attract over a million per annum, collecting £4m in income. 2020/21 has seen usage numbers and income crippled to around 25% of normal levels as the coronavirus lockdown and restrictions affect trading. A new Actif Anywhere online service has been launched to compliment the physical offer at sites during this unprecedented period.	0	0	200	200	New leisure facilities in Llanelli and Carmarthen to drive additional income generating activities. New membership scheme income based on assumption that existing memberships will return to pre pandemic levels by April 2022
Y Gat Craft Centre	69	Arts venues include Oriel Myrddin Art Gallery in Carmarthen, Y Gât in St. Clears and the Dylan Thomas Boathouse, Laugharne Y Gât (formerly known as St. Clears Craft Centre) is an arts facility that also hosts the local library and an in-house catering facility. The facility has an open gallery / shop area along with conference rooms facilities and studio spaces for local artists to hire.	0	15	0	15	Discussions ongoing with Town Council and as part of 10 town planning.
Libraries	2,475	Carmarthenshire libraries provide an extensive choice of books, DVDs, CDs, online services, newspapers and magazines. With over half a million books on offer between 3 regional, 13 branch and mobile libraries, the service offers invaluable support and access to Carmarthenshire residents. Public access computers and Wi-Fi are available at all libraries, and typically, the service issues over 600,000 books per year. The mobile service provides a valuable outreach services to rural parts of the County, linking up with various partners to deliver public information services online.	10	10	10	30	Increased operational efficiency
Print	16	Print savings across all Leisure Services	8	0	0	8	Based on 50% reduction of 2021-2022 budgets

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Travel	20	Print savings across all Leisure Services	10	0	0	10	Based on 50% reduction of 2021-2022 budgets
Total Leisure			101	203	275	578	

Integrated Services

Domiciliary Care	13,980	<p>Domiciliary Care is provided to approx 1,000 individuals in the county in. On average over 11,000 hours per week are delivered by in-house and independent domiciliary care agencies.</p> <ul style="list-style-type: none"> - Around 250 individuals receive care from two carers (known as "double handed" care). - Approx 170 individuals receive a large package of care involving 4 calls per day. - Fulfilled Lives is a model of domiciliary care which has been developed for individuals living with dementia which has demonstrated that the service can maintain people living at home for longer than traditional domiciliary care. The plan is to expand the service to cover the entire county. - The Reablement Service provides short term domiciliary care. The number of clients who receive Reablement is over 500 and 55% leave the service with no long term care package. - Information, Advice and Assistance (IAA) and the Carmarthenshire United Support Project (CUSP) are both preventative services which support individuals to maintain their independence without the need for statutory social services. By increasing the proportion of referrals that go through IAA or CUSP, it reduces the demand on statutory services. - The specialist Continence service has been established within Community Nursing. By providing the right continence products to meet the individual's continence needs, it is possible to reduce the number of visits per day of domiciliary care. 	510	675	475	1,660	<ul style="list-style-type: none"> -To reduce the number of clients receiving small packages by 125 people (50%), in line with recommendations of Prof Bolton -Reduce the number of people receiving 4 calls per day or more by 1%. This equates to 11 people per year. -Increase number of people with dementia receiving Fulfilled Lives service from 85 (July 2021) to 105 in Year 1, 125 in Year 2, 140 in Year 3. (The figure in March 2019 was 39) -To increase the number of people not requiring a long term service - To reduce double handed care by a further 20 cases in Year 1; 20 in Year 2; Maintain in Year 3.
Extra Care		Extra Care facilities provide supported accommodation as an alternative to a residential care home placement. There are 4 extra care facilities (Cartref Cynnes, Ty Dyffryn, Plas y Môr and Cwm Aur) for older people. A domiciliary care service is provided to those tenants living in the Extra Care facilities who require care and support. The aim of Extra Care is to avoid or delay the need for a residential care placement. Residential care is provided in local authority and private sector care homes for individuals who can no longer live independently in the community.	50	50	50	150	<p>EXTRA CARE Increase in number of Extra Care Category A residents with complex care needs. Extra Care is a strategy to reduce residential placements.</p> <p>TARGET: Increase number of people in Cat A flats from 68 (average 2020-21) to 77 by 2024-25, thereby preventing 9 placements.</p>
Residential Homes		Residential care homes provide accommodation as well as 24-hour personal care and support for older people and adults who struggle to live independently, but do not need nursing care. Residential care homes help people manage daily life, such as assisting with getting dressed, washing and eating.	50	150	150	350	Residential Care Manage Demand from hospital including CHC + Out of County placement
Cross Departmental - Print		Reduction in print budgets following better ways of working	2	0	0	2	Reduction in print budgets following better ways of working
Cross Departmental - Travel		Reduction in travel budgets following better ways of working	25	0	0	25	Reduction in travel budgets following better ways of working
Total Integrated Services			637	875	675	2,187	

Adult Social Care

Shared Lives		Shared Lives provides placements for individuals with Learning Disabilities or Mental Health issues with families that have been approved as Shared Lives Carers.	110	55	55	220	Shared Lives – Stepping down two individuals from res care
Residential and Supported Living		Supported Living is provided for those individuals with Learning Disabilities or Mental Health issues who need support with daily living tasks to remain in the community. Support is provided from staff in the setting which can range from a few hours to 24/7 in some circumstances. Promoting independence is a key aspect of supported living.	165	550	550	1,265	Rightsizing of placements to maximise independence and mitigate against over provision, deregistration of residential care to Supported Living. Collaborative opportunities for income including grants
Day Services		Day services are provided for individuals with a Learning Disability by a number of external providers, particularly those with the most complex needs. The vision for the in house day service is that our building based service will cater for those with the most complex needs, thus reducing the reliance on external provision.	330	165	55	550	Accommodating individuals with complex needs in house provision in line with transformation plans to accommodate those with the most complex needs in building based services, and maximise use of community and local authority provision to promote independence.
Print		Reduction in print budgets following better ways of working	3	0	0	3	Based on 50% reduction of 2021-2022 budgets
Travel		Reduction in travel budgets following better ways of working	32	0	0	32	Based on 50% reduction of 2021-2022 budgets
Total Adult Social Care			640	770	660	2,070	

Homes and Safer Communities

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Financial Investigator		A financial investigation team has been set up to investigate illegal trading activity across the County, including on-line. Where illegal activity has been proved through the Court system we also implement the Proceeds of Crime legislation (POCA) that means we any profits that are made from this illegal activity are returned to a variety of statutory agencies. Any individual who has lost out can also be re-imbursed.	0	200	200	400	Additional income as a result of pro-active work carried out by our newly created Financial Investigation Unit.
Print		Reduction in print budgets following better ways of working	8	0	0	8	Based on 50% reduction of 2021-2022 budgets
Travel		Reduction in travel budgets following better ways of working	21	0	0	21	Based on 50% reduction of 2021-2022 budgets
Public Protection & Housing		The service provides business support for Homes & Safer Communities.	50	50	50	150	Reduction in business support through implementation of new systems and agile working
Public Protection & Housing		The service provides business support for Homes & Safer Communities.	70	50	20	140	Modernisation of business processes
Total Homes and Safer Communities			149	300	270	719	
Business Support and Commissioning							
Print		Reduction in print budgets following better ways of working	18	0	0	18	Based on 50% reduction of 2021-2022 budgets
Travel		Reduction in travel budgets following better ways of working	7	0	0	7	Based on 50% reduction of 2021-2022 budgets
Postages			4	4	0	8	
Departmental Managerial Restructure		The service provides business support for Social Care. The functions include payment of creditors, management of transport and premises; the assessment and collection of income for residential and non residential services; and general business support	75	0	0	75	Review of Managerial posts across Communities Department
Transport		The service provides transport support for Social Care.	70	80	100	250	Review of Transport for service users, making better use of the buses available, and increasing contracted in work
Total Business Support and Commissioning			174	84	100	358	
Performance and Business Transformation Teams							
Print		Reduction in print budgets following better ways of working	1	0	0	1	Based on 50% reduction of 2021-2022 budgets
Travel		Reduction in travel budgets following better ways of working	1	0	0	1	Based on 50% reduction of 2021-2022 budgets
						0	
Total Performance and Business Transformation Teams			2	0	0	2	
Communities Total			1,703	2,232	1,980	5,914	

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'001	£'000	

Education & Children

School Improvement	1,508	The Council is obliged to employ a notional number of officers to provide a School Improvement Service to meet the needs of our schools. With a reduced number of schools it is possible to review this notional figure.	0	0	122	122	Reprofiled due to direct link to review of MEP. Reduction in School Challenge Advisor levels equivalent to 1 FTE on the basis that the school rationalisation programme is progressed.
Education Otherwise than at School	1,918	This service meets the needs of learners who, due to a wide range of often complex behaviour and engagement issues, cannot access education in mainstream schools. These learners require a bespoke and specialist package of support.	50	0		50	Under this proposal, the council will increase the partial recoupment from schools (to consider more elements of the placement costs e.g. officer time, administration, monitoring, progress reviews etc). Currently, the Council only recoups the pupil funding element from the pupil's main school.
Additional Learning Needs	650	A review of all specialist settings and provision in light of the impending ALN Transformation and our Behaviour Services Review with the aim of upskilling school staff to deal with a range of ALN and implement our Inclusion Policy	0	70	30	100	This has been reprofiled from 2021-22 to allow for implementation post covid recovery with an intended commencement of Sept 2022. We will maintain the workforce on an outreach basis so that the pupils attend their local school and benefit from the additional support which could therefore become more widespread. It is expected that the TAs could be redeployed as part of the development of the centrally coordinated SEN support pool releasing part of this specific budget area.
Departmental - across Education Services	15,771	The majority of the Services' budgets are for the support, administration and management of the schools - School improvement, Grant support, Data, Admissions, School Meals, Music Service, ALN, safeguarding to name a few	0	180	100	280	Reprofiled due to direct link to review of MEP. Rationalising of Primary Schools will reduce the level of support required. The savings would actually be managerial as service provision would not be reduced, however it is a policy decision that would enable this efficiency to be delivered

Education & Children Total

50 250 252 552

Schools Delegated Budget

Primary School Delegated Budget	62,843	<ul style="list-style-type: none"> This is the budget delegated to every school under the Fair Funding formula. The budget is to meet all the costs associated with running a school e.g. staff costs, premises costs, SEN specialist support, Service Level Agreements for specific services such as HR, IT, Legal, Grounds Maintenance, Music. 		270	480	750	It is proposed that we review our primary schools footprint identifying schools that are disproportionately expensive to operate and finding it challenging to sustain educationally effective teaching and learning structures due to low pupil numbers. Through carefully selected decommissioning and strategically driven school investment and federations the primary school estate could be reduced. Rationalising the number of schools will improve the financial stability of the remaining schools and reduce demands on a range of County Council services e.g. Finance, HR, catering, cleaning.
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Schools Delegated Budget Total

0 270 480 750

Environment**Waste & Environmental Services**

Household Waste Recycling Centres (HWRC)	total budget for Waste is £16M	There are currently four HWRCs located across the County that serve all communities. The HWRCs are normally open 7 days a week.	20	30	0	50	Reduce opening days of Household Waste Recycling Centres - exact days and sites to be based on data-driven usage.
Commercial opportunity - income from Japanese Knotweed Treatment (net)	total budget for Grounds £1.2m	The grounds maintenance team arranges the treatment of Japanese Knotweed with respect to its own assets and other landownership across the Council.	0	0	10	10	Potential to treat knotweed for external clients, subject to wider corporate consideration on commercial activity that service departments can undertake.
Total Waste & Environmental Services			20	30	10	60	

DEPARTMENT	2021/22 Budget	FACT FILE	2022/23 Proposed	2023/24 Proposed	2024/25 Proposed	Total	EFFICIENCY DESCRIPTION
	£'000		£'000	£'000	£'000	£'000	
Education & Children							
Additional Learning needs	650	The Authority has 5 Observation and Assessment Units (for ALN) based in 3 schools which pupils attend from across the county and are resourced with Teachers and TA's.	100			100	We would look to de-commission the Observation and Assessment Units however we will maintain the workforce on an outreach basis so that the pupils attend their local school and benefit from the additional support which could therefore become more widespread. Observation and assessment will be carried out in the mainstream as opposed to specialist settings.
Curriculum and Wellbeing- Youth Support Services	880	The Youth Support Service provides a range of statutory and non-statutory functions to meet the needs of Carmarthenshire's children and young people. The service offers support from universal youth support (e.g. Duke of Edinburgh & Youth Clubs) through to specialist interventions in working with children and young people with complex needs. This incorporates School-based Youth Work; Youth Justice and post 16 provision.	15			15	Reduce grants to 3rd sector
Education & Children Total			115	0	0	115	

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	Description	2022/23 £'000
IT Hardware replacement scheme	Balance of Laptop Replacement scheme funded in previous year (increased requirement)	56
Election 2022	To provide sufficient funding for 2022 County Council elections	100
Recruitment of childcare paralegal	Increased requirement for legal support - increased caseload as well as increased complexity	30
Senior Property Lawyer	To provide recurrent funding for existing post which has been reserve funded	81
Loss of income - provisions markets	Sustained reduction in the level of rents achievable in provisions markets	60
Increase in Member allowances	Net budget increase required to meet recommendations of Independent Remuneration Panel for Wales (IRPW) which is a legislative requirement	200
Increase in Trade Unions facilities time	Funding to provide for increase in TU facility time	50
Total for the Chief Executives Department		577
Delegated School Budgets ALN	additional funding for delegated budgets and increased Additional Learning Needs demand (combination of schools & department budgets)	2,000
Department budgets ALN		
Delegated School Budgets		
Childrens Services	Increased funding for social work team required to address significant caseload post COVID19	300
Departmental budgets	additional funding to cover a range of pressures including direct payments, safeguarding and youth services and increase in home educated children	300
Total for the Education & Childrens Department		2,600
Demographic Growth 2.7% on older peoples budgets	Based on forecasts for population growth for over 75 age group and anticipation of increased intensity of care needs	1,643
NATIONAL Living Wage Increase - £8.91 to £9.50 - Additional Increase above inflation	Actual increase of 6.6% applied to wage component of commissioned care	1,430
Additional increase to FOUNDATION Living Wage (to £9.90)	Included within WG Programme for Government. Minister's letter instructs Local Authorities to provide from base budgets	2,448
Social care levy effect on commissioned care	Estimated impact of National Insurance increase on commissioned care providers	694
Total for the Communities Department		6,215
Total for the Corporate Services Department		-

Waste	Increased cost of Waste Service delivery change (nb part year effect only)	1,294
Planning	3 new posts to address service areas of improvement plus £20k school greening fund	158
Highways	Increase Drainage and Gully Cleansing provision in recognition of Climate change increased frequency / severity of adverse weather events	200
Public and School Transport	Combination of Driver shortages and additional ALN demand	300
Total for the Environment Department		1,952
Corporate Joint Committees	Forecast budget requirement which will be levied on Carmarthenshire from new CJC	200
Energy (corporate)	Significant increase notified by Crown Commercial Services of up to 40% price increase on energy component of gas and electricity bills	1,000
TOTAL		12,544

CABINET 17th JANUARY 2022

FIVE YEAR CAPITAL PROGRAMME (COUNCIL FUND) – 2022/23 TO 2026/27

Recommendations / key decisions required:

That Cabinet notes the content of this report and endorses it as a provisional capital programme for consultation purposes, including consideration by the Policy and Resources Scrutiny Committee at its meeting on 2nd February.

Reasons:

To enable the authority to agree a five-year capital programme 2022/23 to 2026/27.

Relevant scrutiny committee to be consulted YES

Cabinet Decision Required YES

Council Decision Required NO

CABINET MEMBER PORTFOLIO HOLDER: Cllr David Jenkins

Directorate: Corporate Services

Name of Head of Service:
Randal Hemingway

Report Author: Adrian
Armstrong

Designations:

Head of Financial
Services

Tel: 01267 224886

Email addresses:

RHemingway@carmarthenshire.gov.uk

MAArmstrong@carmarthenshire.gov.uk

**EXECUTIVE SUMMARY
CABINET
17th January 2022**

**FIVE YEAR CAPITAL PROGRAMME (COUNCIL FUND) – 2022/23
TO 2026/27**

The report brings together the latest proposals for the five-year capital programme 2022/23 to 2026/27. It forms the basis of the budget consultation process with members and other relevant parties. Feedback from this consultation process, along with any updates, will inform the final Capital Programme budget report which will be presented to Cabinet on 21st February 2022 and County Council in March 2022.

The proposed gross expenditure on the capital programme for 2022/23 is £144.844m with the projected funding being £52.249m from the county council's own resources through the use of borrowing, reserves and general capital grant and, the balance of funding of £92.595m coming from external sources. These figures include projects delayed in 2021/22, mainly because of Covid-19 restrictions, that have been carried over and built into the budgets of future years.

The capital programme is projected to be fully funded over the five years.

It includes projected expenditure on the Swansea Bay City Region Deal projects against which the authority will borrow, with the funding being returned from both Welsh and UK governments over a 15-year period (from 2018/19).

DETAILED REPORT ATTACHED?

YES

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: **Randal Hemingway** Head of **Financial Services**

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
NONE	NONE	YES	NONE	NONE	NONE	YES

3. Finance

The updated capital programme is projected to be fully funded for the five years 2022/2023 through to 2026/27, however, if any of the currently anticipated funding does not materialise it will need to be revisited. Short-term borrowing has been used in years 1 and 2 of the capital programme to facilitate the early development of some projects, this will be repaid in the later years of the programme when funding becomes available.

7. Physical Assets

New assets created from the capital programme will be added to the Council's portfolio. In addition, the programme proposes expenditure to improve the existing assets and comply with statutory responsibilities.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Randal Hemingway Head of Financial Services

(Please specify the outcomes of consultations undertaken where they arise against the following headings)

1. Scrutiny Committee

Relevant Scrutiny Committees will be consulted.

2. Local Member(s) N/A

3. Community / Town Council N/A

4. Relevant Partners N/A

5. Staff Side Representatives and other Organisations N/A

**EXECUTIVE BOARD PORTFOLIO
HOLDER(S) AWARE/CONSULTED**

YES

Include any observations here

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
2021/22 – 2025/26 Capital Programme		Corporate Services Department, County Hall, Carmarthen. On-line via corporate website – Minutes of County Council Meeting 3 rd March 2021.
2022/23 – 2026/27 Capital Programme		Corporate Services Department, County Hall, Carmarthen.

REPORT OF DIRECTOR OF CORPORATE SERVICES

CABINET

17th JANUARY 2022

FIVE-YEAR CAPITAL PROGRAMME – 2022/23, 2023/24, 2024/25, 2025/26 and 2026/27

DIRECTOR & DESIGNATION	DIRECTORATE	TELEPHONE NO.
C Moore, Director of Corporate Services	Corporate Services	01267 224120
AUTHOR & DESIGNATION	DIRECTORATE	TELEPHONE NO.
R Hemingway, Head of Financial Services	Corporate Services	01267 224886

1 INTRODUCTION

- 1.1. The report provides members with a view of the proposed five-year Capital Programme 2022/23, 2023/24, 2024/25, 2025/26 and 2026/27.
- 1.2. This report forms the basis of the budget consultation process with members and other relevant parties. Feedback from this consultation process, along with any updates on the settlement figures and grant applications, will inform the final Capital Programme budget report which will be presented to Cabinet in February 2022 and County Council in March 2022.
- 1.3. The authority is required to approve a rolling capital programme each year as part of its budget setting process. This facilitates forward planning and is consistent with the requirements of the Prudential Code in terms of financial planning and funding while assisting officers in bidding for external funding.

2. BACKGROUND

- 2.1. Last year the authority agreed a fully funded five-year capital programme 2021/22 to 2025/26 which was approved at County Council on 3rd March 2021.
- 2.2. 2021 was another unprecedented year and saw us reprioritise our capital strategy and capital programme to reflect the desire to boost local businesses and local economies in response to the Covid-19 pandemic. This commitment remains our focus in the coming years and coupled with the UK Government's levelling up funding will see significant investments to boost the Carmarthenshire economy. Following a particularly disappointing capital provisional settlement from the Welsh Government, which reduced by over £1.8m unhyponothecated capital funding, we will bring forward plans to increase borrowing to support our plans. The capital programme was revisited by the Strategic Assets Steering Group (SASG) and the Corporate Management

Team. Departments also submitted proposals for new and urgent projects for the programme. Projects have been assessed and prioritised with only the highest priorities being included in the programme.

- 2.3. The proposed capital programme is attached in Appendix A and shows the anticipated expenditure and sources of funding over the five year period.
- 2.4. The proposed Capital Programme and Funding is based on Welsh Government's (WG) Provisional Settlement, received on 21st December 2021. This year the capital funding across Wales is reduced from £177m in 2021/22 to £150m for 2022/23. For Carmarthenshire this means a reduction in funding from £11.866m to £10.037m, some £1.829m. This reduction has caused an unexpected shortfall in our funding for the first year of the programme. Capital funding returns to higher levels at £180m across Wales from 2023/24 and is supplement with further funding specifically for decarbonisation projects. The programme reflects this funding. The Final Settlement, is due in March, should there be any amendments in the funding figures that Cabinet will be asked to delegate to the Director of Corporate Services authority to adjust the programme accordingly, in liaison with the Chief Executive, Leader and Cabinet Member for Resources. Similarly, delegated authority to update the programme is sought should any other award of grant funding be received at the same time, for example, transport grants, again in consultation with the same.

3. PRIORITIES

- 3.1. The current Corporate Strategy for 2018-2023 (refreshed June 2019) sets out the Authority's strategic priorities, aspirations, overarching themes and core values, and the programme has been developed in line with these, whilst also recognising the priorities that have come forward as a consequence of the pandemic and Levelling Up funding.
- 3.2. The proposed capital programme of £269m over the five years is aimed at delivering a number of key projects that will create jobs and improve the quality of life for the people of Carmarthenshire. Including the delivery of the £82m Pentre Awel development which includes a £27m leisure centre element in Llanelli, the £19m Tywi Valley Path between Carmarthen and Llandeilo, the new £20m Town Centre Hub in Carmarthen, and upgrades to the community sport facilities in Ammanford.

The key investments within the programme are:

	£'m
Schools	73
Housing (Non HRA)	11
Lesiure & Culture	2
Regeneration	39
Swansea City Deal Region	74
ICT and Property	4
Environment	66

4. FUNDING

The provisional settlement received from WG allocated capital funding of £10.037m for the Authority in 2022/23, made up of Non-hypothecated Supported Borrowing of £5.942m and General Capital Grant of £4.095m. This is a £1.829m reduction from the 2021/22 award and has caused an unexpected shortfall in our funding for the year. It returns to £12.044m in years two to five of the programme and is also supplemented by a further £1.3m per annum for decarbonisation projects, based on figures provided in the provisional settlement.

- 4.1. The level of capital receipts funding included within the programme has been revised in line with latest estimates. Capital receipts of £3.5m will be applied over the five year period. It should be noted that there may be a need to amend future capital programmes if there is a shortfall in expected receipts.
- 4.2. The use of earmarked reserves was approved as part of previous years' reports and were included as funding for the current capital programme. In total some £36.5m of reserve funding is included over the five years of the programme.
- 4.3. The existing levels of investment into the schools estate programme is maintained with a realisation that additional funding will be needed in future years to deliver the whole MEP programme. New funding will be dependent on the ongoing MEP review which will be presented in a future report. The ongoing MEP review was agreed at a recent meeting of the cabinet.
- 4.4. Funding from external parties in the form of grants for the whole of the capital programme is currently expected to be in the region of £150m which includes £52m for City Deal projects and £33m for Levelling Up projects.
- 4.5. As part of the provisional annual settlement from Welsh Government, funding was made available on an all Wales basis for the following areas:
 - Active Travel Fund, Local Transport Fund, Road Safety and Safe Routes in Communities - £94m for 2022/23. Carmarthenshire will bid for funding from these grants and any successful awards will be added to the capital programme in due course.
 - Ultra-low Emissions Vehicles Transformation - £15m. Carmarthenshire will be bidding for projects under this funding, all-be-it this appears to have dropped from 2021-22.
- 4.6. Disappointingly, no award was made for Highways Refurbishment or Resilient Roads funding as in previous years which means we have had to revise down our commitments in this area. The grant in previous years received by Carmarthenshire was £1.5m and £2m respectively.
- 4.7. Given our significant investments in years 1 and 2 of the programme and the reduced capital settlement from WG we propose to make use of unsupported borrowing, short-term, to prevent what would otherwise be a shortfall in funding at the start of the programme. This will be repaid in years 3, 4 and 5 of the programme where funds are available.

5. CAPITAL PROGRAMME 2022/23 TO 2026/27

- 5.1. When the capital programme was approved at County Council on 3rd March 2021 it was fully funded. The new capital programme again remains fully funded over the five-year period.

Community Services

- 5.2. In recent years there have been significant investments across the Community Services portfolio with investments in the new Carmarthenshire Archive, Museums in Abergwili and Parc Howard and the ongoing development at Oriel Myrddin.
- 5.3. The new programme includes the provision of a new leisure centre in Llanelli, which will be delivered in conjunction with the Pentre Awel development under the umbrella of the Swansea Bay City Region.
- 5.4. In 2026/27 within Private Sector Housing, further funding is provided for Disabled Facility Grants of £2.5m. In recent years £2m has been awarded annually in this area so the additional £500k accounts for inflationary pressures.

Environment

- 5.5. For 2026/27 further allocations to existing rolling programmes of work are included, namely Highway Improvements £600k, Bridge Maintenance £400k, Road Safety Improvement £250k, public lighting, £400k.

Given the disappointing omission of specific highways Improvement grant funding in the WG settlement. In order to mitigate the effects of the removal of this funding from WG we propose to make available, from the council's own reserves, £1m to fund highways in 2022/23. This is in addition to our annual commitment of £600k already mentioned. We will work with the WG in the hope that funding towards this important strategic county asset of highways can be restore in future years.

- 5.6. 2026/27 also sees the continuation of the £66k annual allocation to Rights of Ways and Byways, in recognition of our obligations in this area and the wider community health and environmental benefits provided by these valuable resources.
- 5.7. Last year, as part of the reprioritisation of capital resources, funding for the Tywi Valley Path project was repurposed towards measures to stimulate the economy following the Covid-19 pandemic because of the project's lack of external grant funding. However, at the time a commitment was given that if grant funding did become available that we would seek to restore our match funding for this project. Therefore following an award of grant of £16.8m from the UK Government's Levelling Up Fund, £1.9m is awarded to deliver this project. A major investment which will bring significant benefits to the rural economy and improvement to health and wellbeing, and which delivers on our commitment to restore funding should grant funding be forthcoming. This will be funded by unsupported borrowing. In addition £366k is made available to upgrade parking provision for the Tywi Valley Path, making it more

accessible to a wider number of commuters, families, visitors and walking and cycling enthusiasts of all abilities; making it a truly landmark community resource.

5.8. New funding for flood risk management of £75k per annum is made available to match external grants in years 1 and 2 of the programme.

5.9. An annual allocation of £250k is established for highways drainage, which will help to make a highway network more resilient to future weather events and reduce flood risks.

5.10. Significant investment continues to be main available to the upkeep and refurbishment of the County's estate.

- Recognising the backlog of works across the council's operational estate, last year specific monies were made available for works at County Hall, £2.5m, and Ty Elwyn bringing the total investment to £1.2m. These works continue, alongside £300k for county farms slurry infrastructure.
- In addition in 2026/27 it is proposed to continue the annual allocation towards Capital Maintenance across the county estate at £3m. (£14.7m across the five years.) This maintains our investment in this area whilst recognising that the estate may be downsized in coming years as we aim to release capital receipts to fund future programmes and await the outcome and recommendations of Better Ways of Working review.

5.11. £4.7m for refuse and recycling vehicle replacement is included, together with an additional £1m from reserves as the Authority's match funding contribution to our Waste Strategy which will see the rollout of kerbside sorting for recycling collections. It is hoped that this project will attract significant funding from WG which will see investment in the infrastructure at Nantycaws and the replacement of the current refuse lorries with an electric fleet in the coming years. It will make a huge contribution to our efforts to decarbonise our services to address our local, national and global commitment to Net Zero Carbon.

5.12. A five-year Fleet Replacement Programme for £6.5m, excluding refuse and recycling collection vehicles, is included to ensure that vehicles and plant machinery assets are replaced when they reach the end of their viable economic life. The funding for this capital spend will be provided directly from revenue budgets of the service users via prudential borrowing.

5.13. As part of the provisional settlement £20m per annum from 2023/24 will be made available on an all Wales basis for the decarbonisation agenda. We have assumed that this will be a proportional allocation per authority on the same basis as the General Capital Grant and that Carmarthenshire's allocation will therefore be £1.34m per year. Funding for the same is included in the programme. Given that the WG funding for decarbonisation is only available from 2023/24 we propose to supplement this programme with £500k from our own resources, set aside from the forecast underspends in 2021/22, in the coming financial year to accelerate decarbonisation measures across the authority's estate in response to the climate emergency. This is in addition to investments in recent years in retro-fitting some of our

buildings through the re-fit Cymru Project and £500k awarded for grants to private business throughout the county to introduce renewable energy measures.

Education and Children

- 5.14. In the Education and Children Services capital programme, the MEP includes the continuation of the 21st Century Schools improvement programme. Schemes are funded jointly by Welsh Government grant and the Authority.
- 5.15. As referenced earlier in the report a review of the MEP programme is being undertaken and this will influence the programme and priorities for delivery in future years. Amendments to the capital programme will be reported and incorporated upon completion of the review.
- 5.16. The MEP programme continues to include schemes to a total value of £25m which will be supported through the MIM funding approach.
- 5.17. It is proposed to setup a general education fund of £500k per annum to fund ongoing pressures on the education budget including: Equalities Works, Health and Safety measures, mobile classroom provision. It is proposed to fund this budget from within the already approved MEP funding.
- 5.18. £580k is awarded in 2022/23 to complete the new Bus Bays at Ysgol Dyffryn Taf, reflecting the urgency of the health and safety concerns of the current bus bay provision.

Chief Executive

- 5.19. ICT services are crucial to our future ways of working, therefore, the £2.7m allocated across the programme is maintained. This includes annual funding of £200k to support digital transformational projects across council services. The County Council will also see the benefit of the Swansea Bay City Region Digital Project across the County.

Regeneration

- 5.20. £3.75m is made available to match fund a Levelling Up grant of £15.86m the new Carmarthen town centre hub. A new community resource, in partnership with healthcare and education providers. It will also see a new home of the county's art collections currently unseen by the public, and a new fitness suite – for the final fitout of which a further £402k is made available. This development will bring footfall back to the town centre and be a catalyst for the regeneration and revitalisation of West Wales' premier town centre shopping destination.
- 5.21. Included within the City Deal budget is the Pentre Awel project (Zone 1) which will create five distinct buildings linked with a "street" space, comprising an aquatics centre, sports hall, multipurpose sports and fitness rooms and gym, education and training facilities, clinical delivery and research and innovation and business space. The budgeted costs of Zone 1 is £82m with the funding provided via City Deal (£40m), County Council finances, Llanelli Waterfront JV, and external market funding.

The project will also include the provision of a hydro-therapy pool, which will be part of the leisure element, the funding for which includes approximately £1m from a trust. This project, when costs are finalised, will be subject to a separate County Council report. With reference to the City Deal funding, the expenditure - whilst being incurred by the Authority, will be repaid to the Authority over a period of up to 15 years by both Welsh and UK governments. The structure of the City Deal projects means that WG expects the Authority to deliver the projects and raise the funding through borrowing which will then be repaid over a 15 year period. The projects or the Authority will need to accommodate the interest payments on this borrowing.

- 5.22. The Pentre Awel development also provides for an assisted housing development programme, in Zone 3, which is part of the HRA capital programme.
- 5.23. It should be noted that within the City Deal is the budget for the new Llanelli Leisure Centre at £27m, £1.7m of which is new funding from reserves and £7m previously reported as the Llanelli Area Review.
- 5.24. The County Council will also have an input in the regional projects delivered by the Swansea Bay City Region given its role as lead body.

6. WELLBEING OF FUTURE GENERATIONS (WALES) ACT 2015

- 6.1. In considering the capital programme, members need to take into consideration the requirements of the Wellbeing of Future Generations (Wales) Act 2015. The Act requires the public bodies to carry out development sustainably, improving the economic, social, environmental and cultural well-being of Wales.

‘... the public body must act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs’

- 6.2. In doing so, we must demonstrate the following five ways of working:
 - i. Looking at the long-term so that we do not compromise the ability of future generations to meet their own needs
 - ii. Understanding the root causes of issues to prevent them recurring
 - iii. Taking an integrated approach so that we look at all well-being goals and objectives of other services and partners
 - iv. Working with others in a collaborative way to find shared sustainable solutions
 - v. Involving a diversity of population in decisions that affect them

- 6.3. The Act identifies seven well-being goals and provide a shared vision for public bodies to work towards. We must work towards achieving all of them.
- i. A prosperous Wales
 - ii. A resilient Wales
 - iii. A healthier Wales
 - iv. A more equal Wales
 - v. A Wales of cohesive communities
 - vi. A Wales of vibrant culture and thriving Welsh Language
 - vii. A globally responsible Wales
- 6.4. Our well-being objectives are designed to maximise our contribution to achieving the seven well-being goals of the Act.
- 6.5. All projects within the programme have been assesses and scored with the five ways of working, the seven goals and our corporate well-being statement in mind.

7.

SUMMARY

The table below gives a breakdown of the expenditure by departments and the sources of funding.

CAPITAL PROGRAMME SUMMARY						
	2022/23	2023/24	2024/25	2025/26	2026/27	Total
	£'000	£'000	£'000	£'000	£'000	£'000
<u>Expenditure</u>						
Community Services	2,970	3,042	2,300	2,000	2,500	12,812
Environment	21,163	22,782	7,610	7,481	6,364	65,400
Education & Children	50,362	17,435	3,366	1,476	500	73,138
Chief Executive	1,755	465	1,657	200	200	4,277
Regeneration	68,595	33,801	4,500	6,294	201	113,391
Total Expenditure	144,844	77,525	19,433	17,451	9,765	269,018
<u>Grants and Contributions</u>						
External Funding	92,595	48,338	5,035	4,000	0	149,968
Net Expenditure Funded by CCC	52,249	29,187	14,398	13,451	9,765	119,050
<u>CCC Funding</u>						
Non-hypothecated Supported Borrowing	5,942	5,942	5,942	5,942	5,942	29,710
Unsupported Borrowing	5,648	1,406	-500	-1,947	-4,607	0
Prudential Borrowing - Fleet	1,980	7,250	1,000	1,000	0	11,230
General Capital Grant	4,095	6,102	6,102	6,102	6,102	28,503
Decarbonisation General Capital Grant	0	1,338	1,338	1,338	1,338	5,352
Capital Reserves	32,386	3,133	0	500	500	36,519
Joint Venture Funding Llanelli Leisure Centre	0	3,500	0	0	0	3,500
Direct Revenue Funding	2,198	516	516	516	490	4,236
Overall Net Position: Surplus + / Deficit (-)	0	0	0	0	0	0

7.1. To summarise the overall position, the capital programme is fully funded for the five years from 2022/23 to 2026/27.

7.2. The total cost of the programme is £269m of which £150m is funded from external grants and contributions.

7.3. The full detail of the proposed five-year capital programme is attached in Appendix A.

8. REVENUE IMPLICATIONS

8.1. The revenue budget strategy in 2022/23 allows for a £400k increase in the revenue budget implications of the capital programme.

9. RECOMMENDATIONS

9.1 That Cabinet notes the content of this report and endorses it as a provisional capital programme for consultation purposes, including consideration by the Policy and Resources Scrutiny Committee at its meeting on 2nd February 2022.

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
COUNCIL FUND	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
COMMUNITIES																		
Private Sector Housing																		
Disabled Facility Grants	1,700	0	1,700	2,000	0	2,000	2,300	0	2,300	2,000	0	2,000	2,500	0	2,500	10,500	0	10,500
Enable - Adaptation to assist independent living	0	270	270	0	0	0	0	0	0	0	0	0	0	0	0	0	270	270
Sports & Leisure																		
Amman Valley Leisure Centre 3G Pitch	700	300	1,000	1,042	0	1,042	0	0	0	0	0	0	0	0	0	1,742	300	2,042
Ports																		
Burry Port Harbour Walls	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Communities	2,400	570	2,970	3,042	0	3,042	2,300	0	2,300	2,000	0	2,000	2,500	0	2,500	12,242	570	12,812

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
COUNCIL FUND	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
ENVIRONMENT																		
<i>Countryside</i>																		
Byways	16	0	16	16	0	16	16	0	16	16	0	16	16	0	16	80	0	80
Rights of Way Improvement Programme	50	0	50	50	0	50	50	0	50	50	0	50	50	0	50	250	0	250
<i>Coastal and Flood Defence</i>																		
Trebeddrod Reservoir	300	0	300	0	0	0	0	0	0	0	0	0	0	0	0	300	0	300
Flood Management	75	425	500	75	425	500	0	0	0	0	0	0	0	0	0	150	850	1,000
<i>Fleet Management</i>																		
Fleet Replacement - Prudential Borrowing	1,980	0	1,980	2,520	0	2,520	1,000	0	1,000	1,000	0	1,000	0	0	0	6,500	0	6,500
<i>Infrastructure</i>																		
Multi Storey Car Park, Llanelli	60	0	60	60	0	60	60	0	60	60	0	60	60	0	60	300	0	300
Highways	1,600	0	1,600	600	0	600	600	0	600	600	0	600	600	0	600	4,000	0	4,000
Highways Drainage	250	0	250	250	0	250	250	0	250	250	0	250	250	0	250	1,250	0	1,250
Bridges and Structures	400	0	400	400	0	400	400	0	400	400	0	400	400	0	400	2,000	0	2,000
Street Lighting Replacement & Upgrade	0	0	0	0	0	0	400	0	400	400	0	400	400	0	400	1,200	0	1,200
<i>Waste Management</i>																		
Refuse and Recycling Strategic Infrastructure Transformation	1,000	0	1,000	0	0	0	0	0	0	0	0	0	0	0	0	1,000	0	1,000
Refuse Vehicles replacement	0	0	0	2,125	0	2,125	0	0	0	0	0	0	0	0	0	2,125	0	2,125
Decarbonisation of Refuse and Recycling Collection Vehicles	0	0	0	2,605	0	2,605	0	0	0	0	0	0	0	0	0	2,605	0	2,605
<i>Transportation</i>																		
Road Safety Improvement Schemes	250	0	250	250	0	250	250	0	250	250	0	250	250	0	250	1,250	0	1,250
A4138 Hendy Link Road	50	0	50	0	0	0	0	0	0	0	0	0	0	0	0	50	0	50
Highway Junction Improvements/Signals Upgrade	25	0	25	0	0	0	0	0	0	0	0	0	0	0	0	25	0	25
Active Travel - Walking & Cycling Linkages	100	0	100	0	0	0	0	0	0	0	0	0	0	0	0	100	0	100
Cross Hands Economic Link Road Phase 2	750	0	750	0	0	0	0	0	0	0	0	0	0	0	0	750	0	750
<i>Public Transport Infrastructure</i>																		
Tywi Valley Path - Levelling Up Fund	956	8,601	9,556	863	8,174	9,037	0	0	0	45	0	45	0	0	0	1,864	16,775	18,639
Tywi Valley Path - Carparking provision	193	0	193	193	0	193	0	0	0	0	0	0	0	0	0	386	0	386
<i>Property</i>																		
Capital Maintenance	2,582	0	2,582	2,838	0	2,838	3,246	0	3,246	3,072	0	3,072	3,000	0	3,000	14,738	0	14,738
Decarbonisation of Estate Programme	500	0	500	1,338	0	1,338	1,338	0	1,338	1,338	0	1,338	1,338	0	1,338	5,852	0	5,852
County Hall	1,000	0	1,000	0	0	0	0	0	0	0	0	0	0	0	0	1,000	0	1,000
Total Environment	12,137	9,026	21,162	14,183	8,599	22,782	7,610	0	7,610	7,481	0	7,481	6,364	0	6,364	47,775	17,625	65,400

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
COUNCIL FUND	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
EDUCATION & CHILDREN																		
Schools: General Projects																		
Non MEP Education Works - Equalities Works, Mobiles, H&S etc	500	0	500	500	0	500	500	0	500	500	0	500	500	0	500	2,500	0	2,500
Dyffryn Taf Bus Bays	580	0	580	0	0	0	0	0	0	0	0	0	0	0	0	580	0	580
School Capital Maintenance	3,141	0	3,141	0	0	0	0	0	0	0	0	0	0	0	0	3,141	0	3,141
Improving Ventilation in Schools	134	0	134	0	0	0	0	0	0	0	0	0	0	0	0	134	0	134
21st Century BandA - Design stage Projects																		
Rhydygors	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Laugharne	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
Dewi Sant	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
21st Century BandA - Approved Schemes																		
Llangadog	0	492	492	0	0	0	0	0	0	0	0	0	0	0	0	0	492	492
Rhys Prichard	23	0	23	0	0	0	0	0	0	0	0	0	0	0	0	23	0	23
21st Century BandB - Design stage Projects																		
Ammanford Primary Welsh Medium	100	0	100	100	0	100	0	235	235	0	0	0	0	0	0	200	235	435
Ammanford Primary Dual Stream	100	0	100	100	0	100	0	1,800	1,800	0	0	0	0	0	0	200	1,800	2,000
Llandeilo	50	0	50	50	0	50	0	0	0	0	0	0	0	0	0	100	0	100
Ysgol Gymraeg Gwenllian	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Cross Hands Area	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Penygaer	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Carmarthen West	50	0	50	50	0	50	0	0	0	0	0	0	0	0	0	100	0	100
Hendy	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
Llanybydder/Llanllwni	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Gwendraeth Valley North	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Gwendraeth Valley Central	20	0	20	20	0	20	0	0	0	0	0	0	0	0	0	40	0	40
Llandybie	50	0	50	50	0	50	0	0	0	0	0	0	0	0	0	100	0	100
Heol Goffa New School	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
Bryngwyn	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
Bro Myrddin	100	0	100	100	0	100	0	0	0	0	0	0	0	0	0	200	0	200
21st Century BandB - Approved Schemes																		
Y Castell	0	1,155	1,155	0	60	60	0	0	0	0	0	0	0	0	0	0	1,215	1,215
Pum Heol	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Pembrey	2,771	3,310	6,081	110	0	110	0	0	0	0	0	0	0	0	0	2,881	3,310	6,191
21st Century Match Funding																		
Band A Funding	1,536	3,012	4,548	872	3,570	4,442	0	0	0	0	0	0	0	0	0	2,408	6,582	8,990
Band B Funding	4,130	27,830	31,960	823	10,410	11,233	831	0	831	976	0	976	0	0	0	6,760	38,240	45,000
Childcare Places Offer Grant	0	658	658	0	0	0	0	0	0	0	0	0	0	0	0	0	658	658
Total Education & Children	13,905	36,457	50,362	3,395	14,040	17,435	1,331	2,035	3,366	1,476	0	1,476	500	0	500	20,607	52,532	73,139

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
COUNCIL FUND	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
CHIEF EXECUTIVE																		
<i>Property</i>																		
Rural Estate Infrastructure	0	0	0	0	0	0	300	0	300	0	0	0	0	0	0	300	0	300
St David's Park - Block 3	1,290	0	1,290	0	0	0	0	0	0	0	0	0	0	0	0	1,290	0	1,290
Digital Transformation	200	0	200	200	0	200	200	0	200	200	0	200	200	0	200	1,000	0	1,000
PSBA Network	75	0	75	75	0	75	75	0	75	0	0	0	0	0	0	225	0	225
Strategic Digital Initiatives	100	0	100	100	0	100	100	0	100	0	0	0	0	0	0	300	0	300
Information Security and Governance	50	0	50	50	0	50	50	0	50	0	0	0	0	0	0	150	0	150
Virtualised Server & Storage Environment Replacement	0	0	0	0	0	0	400	0	400	0	0	0	0	0	0	400	0	400
UPS 15KVA	15	0	15	15	0	15	0	0	0	0	0	0	0	0	0	30	0	30
Voice Infrastructure	25	0	25	25	0	25	20	0	20	0	0	0	0	0	0	70	0	70
Business Critical Infrastructure & Strategic ICT Development	0	0	0	0	0	0	512	0	512	0	0	0	0	0	0	512	0	512
Total Chief Executive	1,755	0	1,755	465	0	465	1,657	0	1,657	200	0	200	200	0	200	4,277	0	4,277

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
REGENERATION																		
Transformational Strategy Project Fund	1,500	3,000	4,500	0	0	0	1,500	3,000	4,500	2,000	4,000	6,000	0	0	0	5,000	10,000	15,000
Rural Employment Spaces JV	0	0		1,000	1,000	2,000	0	0	0	0	0	0	0	0	0	1,000	1,000	2,000
Ammanford, Carmarthen & Rural Area																		
Carmarthen Hub - Levelling Up Fund	1,759	7,443	9,202	1,896	8,417	10,313	0	0	0	93	0	93	0	0	0	3,748	15,860	19,608
Carmarthen Hub - Fit-out	0	0	0	0	0	0	0	0	0	201	0	201	201	0	201	402	0	402
Pendine Iconic International Visitors Destination	1,700	0	1,700	0	0	0	0	0	0	0	0	0	0	0	0	1,700	0	1,700
Swansea Bay City Region Projects																		
City Deal - Pentre Awel Wellness Project	0	36,100	36,100	0	11,781	11,781	0	0	0	0	0	0	0	0	0	0	47,881	47,881
City Deal - Llanelli Leisure Centre	17,094	0	17,094	5,206	4,500	9,706	0	0	0	0	0	0	0	0	0	22,300	4,500	26,800
Total Regeneration	22,053	46,543	68,596	8,102	25,698	33,801	1,500	3,000	4,500	2,294	4,000	6,294	201	0	201	34,150	79,241	113,391
Total Council Fund	52,249	92,595	144,844	29,187	48,338	77,525	14,398	5,035	19,433	13,451	4,000	17,451	9,765	0	9,765	119,050	149,968	269,018
Total Council Fund Excluding HRA	52,249	92,595	144,844	29,187	48,338	77,525	14,398	5,035	19,433	13,451	4,000	17,451	9,765	0	9,765	119,050	149,968	269,018

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
COUNCIL FUND	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000

Capital Programme 2022/23 - 2026/27

Capital Project 2022/23-2026/27	Year 1			Year 2			Year 3			Year 4			Year 5			Five Year Total 2022/23:2026/27		
	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total	County Council Funding	External Funding	Total
	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Sources of Funding																		
Borrowing	13,570	0	13,570	14,598	0	14,598	6,442	0	6,442	4,995	0	4,995	1,335	0	1,335	40,940	0	40,940
Capital Receipts	0	0	0	3,500	0	3,500	0	0	0	0	0	0	0	0	0	3,500	0	3,500
Reserves / Revenue	34,584	0	34,584	3,649	0	3,649	516	0	516	1,016	0	1,016	990	0	990	40,755	0	40,755
Highways & Transport Grants		9,026	9,026		8,599	8,599		0	0		0	0		0	0	0	17,625	17,625
Economic Development Grants		46,543	46,543		25,698	25,698		3,000	3,000		4,000	4,000		0	0	0	79,241	79,241
Education Grants		36,457	36,457		14,040	14,040		2,035	2,035		0	0		0	0	0	52,532	52,532
Other Grants & Funding	4,095	570	4,665	7,440	0	7,440	7,440	0	7,440	7,440	0	7,440	7,440	0	7,440	33,855	570	34,425
Total Capital Programme Funding	52,249	92,595	144,844	29,187	48,338	77,525	14,398	5,035	19,433	13,451	4,000	17,451	9,765	0	9,765	119,050	149,968	269,018

Summary of Expenditure by Services	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	
Public Housing																		
Private Housing	1,700	270	1,970	2,000	0	2,000	2,300	0	2,300	2,000	0	2,000	2,500	0	2,500	10,500	270	10,770
Social Care	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Culture & Leisure	700	300	1,000	1,042	0	1,042	0	0	0	0	0	0	0	0	0	1,742	300	2,042
Transportation, Infrastructure & Municipal	8,055	9,026	17,080	10,007	8,599	18,606	3,026	0	3,026	3,071	0	3,071	2,026	0	2,026	26,185	17,625	43,810
Economic Development	22,053	46,543	68,596	8,102	25,698	33,801	1,500	3,000	4,500	2,294	4,000	6,294	201	0	201	34,150	79,241	113,391
Education & Children	13,905	36,457	50,362	3,395	14,040	17,435	1,331	2,035	3,366	1,476	0	1,476	500	0	500	20,607	52,532	73,139
Property	5,372	0	5,372	4,176	0	4,176	4,884	0	4,884	4,410	0	4,410	4,338	0	4,338	23,180	0	23,180
ICT	465	0	465	465	0	465	1,357	0	1,357	200	0	200	200	0	200	2,687	0	2,687
Total Capital Expenditure by Service	52,249	92,595	144,844	29,187	48,338	77,525	14,398	5,035	19,433	13,451	4,000	17,451	9,765	0	9,765	119,050	149,968	269,018

Summary of Expenditure by Department	2022/23			2023/24			2024/25			2025/26			2026/27			Five Year Total		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	
Community Services	2,400	570	2,970	3,042	0	3,042	2,300	0	2,300	2,000	0	2,000	2,500	0	2,500	12,242	570	12,812
Environment	12,137	9,026	21,162	14,183	8,599	22,782	7,610	0	7,610	7,481	0	7,481	6,364	0	6,364	47,775	17,625	65,400
Education & Children	13,905	36,457	50,362	3,395	14,040	17,435	1,331	2,035	3,366	1,476	0	1,476	500	0	500	20,607	52,532	73,139
Chief Executive	1,755	0	1,755	465	0	465	1,657	0	1,657	200	0	200	200	0	200	4,277	0	4,277
Regeneration including City Deal	22,053	46,543	68,596	8,102	25,698	33,801	1,500	3,000	4,500	2,294	4,000	6,294	201	0	201	34,150	79,241	113,391
Total Capital Expenditure By Department	52,249	92,595	144,844	29,187	48,338	77,525	14,398	5,035	19,433	13,451	4,000	17,451	9,765	0	9,765	119,050	149,968	269,018
External Grants	0	92,595	92,595	0	48,338	48,338	0	5,035	5,035	0	4,000	4,000	0	0	0	0	149,968	149,968
Net CCC Funding	52,249	0	52,249	29,187	0	29,187	14,398	0	14,398	13,451	0	13,451	9,765	0	9,765	119,050	0	119,050

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CABINET 17th JANUARY 2022

Council's Revenue Budget Monitoring Report

Recommendations / key decisions required:

That the Cabinet receives the Budget Monitoring report and considers the budgetary position and appropriate corrective action.

In respect of significant overspends, Chief Officers and Heads of Service to critically review options available to them to limit the forecasted overspend of budgets, whilst recognising the ongoing impact which COVID19 measures have had on the Authority's overall budget.

Reasons:

To provide the Cabinet with an update on the latest budgetary position as at 31st October 2021, in respect of 2021/22. Whilst the scale of COVID19 response is reducing, this budget position recognises the ongoing financial pressures faced by the Authority as well as the additional funding support provided by Welsh Government.

Relevant scrutiny committee to be consulted: NA

Cabinet Decision Required YES

Council Decision Required NO

CABINET MEMBER PORTFOLIO HOLDER:

Cllr. David Jenkins

Directorate: Corporate Services	Designations:	Tel No. 01267 224886 E Mail Addresses:
Name of Director: Chris Moore	Director of Corporate Services	CMoore@carmarthenshire.gov.uk
Report Author: Randal Hemingway	Head of Financial Services	RHemingway@carmarthen-shire.gov.uk

EXECUTIVE SUMMARY

Cabinet

17th January 2022

The revenue budget monitoring reports as at 31st October 2021 are attached and indicate that:

COUNCIL FUND REVENUE ACCOUNT (Appendix A)

Overall, the monitoring report forecasts an underspend for the year at departmental level of £1,726k. with a forecast underspend on the Authority's net revenue budget of £1,279k.

At a high level this is due to a combination of:

- additional COVID19 related costs and lost income being largely refunded under the Welsh Government hardship scheme
- some services still paused or impacted by lockdown measures and social distancing during Q1
- Utilisation of some capital financing underspends, due to some significant pressure points on in-year capital project budgets, which was approved as part of a separate report.

The full year forecast reflects the impact which includes known financial positions up to the point of writing. As such the forecast continues to remain sensitive to any future worsening of the pandemic, in particular if any reintroduction public restrictions being required. During the first half of the year (April-September), additional expenditure and income loss totalling approximately £13 million has been claimed under the Welsh Government hardship scheme.

Members should note the risk on Council Tax collection rates and increased applications under the Council Tax Reduction Scheme, this will continue to be monitored closely, particularly as the furlough scheme has now ended.

Chief Executive's Department

The Chief Executive Department is anticipating an underspend of £548k for the year. This is made up of overspends due to a reduction in anticipated income from Commercial property, livestock markets and provision markets, offset by a net underspend on Industrial Premises, underspends on Member pay and travelling, staffing savings from vacant posts across the department, along with savings on utilities costs associated with our administrative buildings.

Operational budgets

The Chief Executive's section has an underspend of £181k, primarily due to vacant posts and an underspend on supplies and services.

There is a £74k net overspend in the People Management section. This consists of £32k in relation to a reduction in supplies and services costs, along with a £43k underspend due to fewer DBS checks being undertaken than budgeted for. These are offset by a £62k overspend in Employee Wellbeing, due to a shortfall in external SLA income and an unachieved training efficiency within Organisational Development of £29k. There is also a £58k overspend on various salary related costs along with other small overspends

The ICT & Corporate Policy section are reporting a £99k underspend largely due to part year vacant posts within the division, pending a team review which has now been completed.

Admin and Law are showing an underspend of £288k. Members pay and travelling are underspent by £102k, and there is an additional £27k of income for work undertaken on behalf of the HRA. There is also additional income from external work of £35k along with a £124k saving on staff vacancies and supplies and services.

The Marketing and Media section have a £201k anticipated net underspend, made up of an overspend of £178k within Marketing and Media on salary costs, pending a staffing review within the whole division (2019/20 saving proposal), and also a loss of income streams from external partners such as ERW. This is offset by an underspend on staffing costs in the Customer Services Centres, Translation Unit and Yr Hwb. These will all form part of the divisional staffing review.

Statutory Services are reporting an underspend of £121k. This is made up of a saving on vacant posts of £56k pending a divisional realignment, along with a £32k underspend on Registrars due to income generated above the budgeted figure. Coroners are anticipated to be underspent by £15k as a result of the appointment of medical examiners by the NHS, resulting in less cases being referred to the coroner. This underspend was partially offset by additional costs associated with a jury inquest during the year. There are also smaller underspends on supplies and services within County Elections and Registration of Electors.

The Regeneration division is expecting a £268k overspend for the year. This is made up of an overspend of £443k due to a loss of income on Livestock markets, provision markets, farms and Commercial Properties, largely due to an overall reduction in occupancy levels, along with a rent free period at Carmarthen Mart.

This is offset by savings in utilities costs due to staff working remotely of £76k, along with additional high levels of income due to continued high occupancy rates within industrial units, despite the pandemic of £67k. There is also an additional saving of £35k on staffing costs due to a vacant post along with other smaller savings.

Department for Communities

The Department for Communities is £169k overspent for the year. There are significant variances in social care services though these are largely offset by reduced costs where service provision is reduced due to COVID19 restrictions, or additional funding. Social care teams have prioritised the safe delivery of key services, meaning that the department has been unable to progress some of the planned savings proposals.

Older People's budgets have an underspend of £1,395k. There are significant underspends in both commissioned and local authority Residential Beds due to reduced associated costs as a result of fewer occupied beds, as well as reduced provision of day services due to COVID19 restrictions.

Physical Disabilities services are underspent by £123k. The budget variances across the range of services are due to alternative care provision in response to residential respite and community services restrictions.

In Learning Disability services, there is an overspend of £1,323k. Budgetary pressure remains on Residential and Group Homes / Supported Living as the savings target are difficult to deliver due to COVID19 restrictions. Also, an increased demand for Direct Payments and a lack of availability of alternative provision due to COVID restrictions has added further pressure. These pressures have been offset with savings due to the reduction of Day Services.

The overspend in Mental Health of £391k is due to increased demand with the main budget pressure in Residential Beds and Group Homes / Supported Living.

Support Services are underspent by £28k largely due to additional income as result of transport support provided to health services.

Leisure & Culture Services is forecasting a nil variance. There is still likely to be a material reduction in income across a number of Services due to the ongoing restrictions, however the Welsh Government have confirmed that the recovery of lost income can now be claimed until the 31st March 2022.

Council Funded Housing and Public Protection Services are forecasting a nil variance.

Corporate Services

The Corporate Services Department is anticipating an £892k underspend for the year.

Rent Allowances are anticipating an underspend of £294k, largely due to efficient recovery of overpayments. There is a £346k underspend on pre LGR pension costs along with a £133k underspend on Rates Relief due to low take up of the scheme.

There are also underspends on salaries due to vacancies across the department, and staff not yet at the top of their scale, along with a reduction in bank charges. There is also £35k of net additional income from services provided to external organisations.

These underspends are offset by an expected overspend of £572k on Council Tax Reduction Scheme due to increased demand. This is a demand led budget, for which WG funding has not increased for many years despite WG's increased expectations in terms of Council's tax

raising abilities. We received a contribution from WG in 2020/21 to cover this shortfall, but we are yet to receive confirmation whether the same will apply this year.

Department for Education and Children

The Department for Education and Children is currently forecasting to break even for the year.

A full review of budget allocation across the department is being undertaken to highlight both the immediate and longer-term pressures. Where appropriate, budgets are being realigned.

A number of services are facing increasing demand with in-year underspends in other service areas, mainly due to vacancies and additional grant funding, financially supporting these pressures – special education needs £697k, school meals £583k, commissioning & social work including legal costs £386k, fostering services £68k, direct payments £159k are the most significant.

Schools Delegated Budgets

Schools working budgets are forecasting to utilise £4.7m of their reserves in the current year. A significant proportion of this is committed for recovery and catch up as one-off additional expenditure, funded by grant received last year. Council officers are in the process of reviewing budget forecasts as some schools continue to experience difficulties in setting a balanced budget.

Environment

The Environment department is reporting a projected underspend of £455k for the financial year, largely due to increased income forecasted from internal recharges reflecting the work projected to the end the financial year by the Property division.

The Waste and Environmental Services division is projecting a £39k underspend, mainly due to the £49k surplus on Green Waste collections due to increased customer base, a £37k underspend in Cleansing as a result of vacant posts which are to be filled imminently following review and savings within other areas including Public Conveniences and Grounds Maintenance. These savings are offset by an underachievement of income against budget on the Sustainable Drainage Approval service which has resulted in a £53k overspend.

Highways and Transportation are projecting a £203k overspend for the year. The main variance is the estimated £417k overspend on school transport due to additional operating days plus supply chain tender prices are increasing. There is a net loss of income of £116k in parking services due to the volume of ticket sales projected not matching budgeted levels, together with a £14k pressure on Nantyci Park & Ride due to a decrease in demand for the service. These pressures are offset by an estimated £161k underspend in Property Design/CHS Works as a result of increased income from internal recharges reflecting work projected during the year, a £55k salary saving due to a vacant post and a reduction in an employee's contracted working hours within the Road Safety team, £82k income projection within Traffic management and Transport Strategic Planning and £32k savings from vacant posts within other areas including school crossing patrols and Public Rights of Way. .

The Planning Division is showing a forecasted £198k underspend, largely due to vacant posts within the team during the year, which includes a vacant Head of Planning post and savings

on consultants' fees due to a covid-related delay in the LDP process. These savings are offset by an estimated shortfall in anticipated income.

The Property Division is reporting a £385k underspend, mainly due to increased income from Property Maintenance reflecting additional work anticipated during the year including significant unexpected projects.

The Business Support division is projecting a £35k underspend during the year.

HOUSING REVENUE ACCOUNT (Appendix B)

The HRA is predicting to be underspent by £1,337k for 2021/22. Repairs and Maintenance is forecast to be underspent by £731k. Budget Managers are predicting underspends on Minor Works £1,471k due to capacity and procurement issues and an overspend on Voids/Responsive/Other +£740k mainly due to costs associated with catch up on repairs delayed by COVID19.

Supervision & Management and Support is projecting an underspend of £232k mainly due to staff vacancies £393k, transport costs £27k due to reduced visits, offset by additional legal costs £171k premises/supplies/other +£17k.

Capital financing charges will be £344k less than budgeted due to reduced borrowing in 2020/21 reducing the MRP requirement as result of 2020/21 end of year position and additional grants secured in 2021/22.

Income (inclusive of rents) will be under target by approximately +£19k. This is made up predominantly of less than budgeted rental/service charge income of +£32k and small variation in interest receivable +£15k. We will receive more grant than anticipated of £66k primarily from Welsh Government.

Lists of the main variances are attached to this report.

DETAILED REPORT ATTACHED?

YES

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Chris Moore

Director of Corporate Services

Policy, Crime & Disorder and Equalities NONE	Legal NONE	Finance YES	ICT NONE	Risk Management Issues NONE	Staffing Implications NONE	Physical Assets NONE
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3. Finance

Council Fund

Overall, the Authority is forecasting an underspend of £1,279k at this point in time. The final out-turn position will be influenced by COVID19 related expenditure, income loss and respective claims from WG through the remainder of the financial year.

HRA

The HRA is predicting to be underspent by £1,337k for 2021/22.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Chris Moore

Director of Corporate Services

1. Scrutiny Committee – Not applicable

2. Local Member(s) – Not applicable

3. Community / Town Council – Not applicable

4. Relevant Partners – Not applicable

5. Staff Side Representatives and other Organisations – Not applicable

CABINET MEMBER PORTFOLIO HOLDER(S) AWARE/CONSULTED
NO

Include any observations here

Section 100D Local Government Act, 1972 – Access to Information

List of Background Papers used in the preparation of this report:

THESE ARE DETAILED BELOW

Title of Document	File Ref No.	Locations that the papers are available for public inspection
2021/22 Budget		Corporate Services Department, County Hall, Carmarthen

REPORT OF THE DIRECTOR OF CORPORATE SERVICES

PRE-CABINET 10th JANUARY 2022

COUNCIL'S BUDGET MONITORING REPORT 2021/22

Director and Designation	Author & Designation	Telephone No	Directorate
C Moore, Director of Corporate Services	R Hemingway, Head of Financial Services	01267 224886	Corporate Services

Table 1

Forecasted for year to 31st March 2022

Department	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year	Aug 2021 Forecasted Variance for Year
	Controllable Expenditure	Controllable Income	Net Non Controllable	Total Net	Controllable Expenditure	Controllable Income	Net Non Controllable	Total Net		
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000		
Chief Executive	33,803	-14,545	-2,517	16,740	32,388	-13,678	-2,517	16,192	-548	-342
Communities	160,332	-65,814	13,585	108,104	165,878	-71,191	13,585	108,273	169	476
Corporate Services	77,079	-45,838	-1,686	29,556	75,893	-45,543	-1,686	28,664	-892	-650
Education & Children (incl. Schools)	190,589	-34,277	23,348	179,660	208,556	-52,244	23,348	179,660	0	5
Environment	129,726	-81,094	12,759	61,390	142,953	-94,775	12,758	60,936	-455	-358
Departmental Expenditure	591,530	-241,568	45,489	395,451	625,668	-277,431	45,488	393,725	-1,726	-869
Capital Charges/Interest/Corporate				-20,155				-20,655	-500	-200
Levies and Contributions:										
Brecon Beacons National Park				152				152	0	0
Mid & West Wales Fire & Rescue Authority				10,737				10,737	0	0
Net Expenditure				386,185				383,959	-2,226	-1,069
Transfers to/from Departmental Reserves										
- Chief Executive				0				274	274	171
- Corporate Services				0				446	446	325
- Education & Children (incl Schools)				0				-0	-0	-5
- Environment				0				227	227	179
Net Budget				386,185				384,906	-1,279	-399

Chief Executive Department
Budget Monitoring - as at 31st October 2021

PRE-CABINET 10th JANUARY 2022

Division	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year £'000	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000		
Chief Executive	846	0	-845	2	667	-2	-845	-180	-181	-163
People Management	4,499	-1,558	-2,619	322	4,876	-1,861	-2,619	396	74	24
ICT & Corporate Policy	5,956	-940	-4,780	235	5,881	-964	-4,780	137	-99	-91
Admin and Law	4,495	-849	703	4,349	4,326	-968	703	4,061	-288	-261
Marketing & Media	2,751	-696	-1,430	625	2,551	-698	-1,430	423	-201	-71
Statutory Services	1,286	-310	281	1,258	1,814	-959	281	1,137	-121	-31
Regeneration	13,970	-10,193	6,173	9,950	12,273	-8,227	6,173	10,218	268	251
GRAND TOTAL	33,803	-14,545	-2,517	16,740	32,388	-13,678	-2,517	16,192	-548	-342

Chief Executive Department - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Chief Executive							
Chief Executive-Chief Officer	237	0	206	0	-30	Savings on supplies & services	-27
Chief Executive Business Support Unit	610	0	461	-2	-151	3 vacant posts not anticipating filling this financial year & a staff member on maternity leave, £31k savings on supplies & services	-136
People Management							
TIC Team	233	-60	247	-60	13	1 x employee regraded with no funding	13
Business & Projects Support	262	0	230	0	-32	Savings on supplies & services	-22
Employee Well-being	775	-350	789	-302	62	Shortfall on budgeted external SLA income. Referrals have reduced from pre COVID19 levels.	36
Organisational Development	522	-39	522	-10	29	Training efficiency target not currently being met.	13
Employee Services – HR/Payroll Support	134	0	165	0	32	£16k graduate not funded, 2 x employees regraded with no funding £9k. Additional £7k agency to cover additional work done for Police/ fire pension payments	27
DBS Checks	124	0	83	-2	-43	Review of DBS checks process & budget to be undertaken	-39
Other variances					13		-4
ICT & Corporate Policy							
Chief Executive-Policy	687	-31	588	-23	-91	3 Vacant posts for most of the year whilst team review was being completed. Restructure now complete resulting in vacant posts going out to advert imminently.	-64
Other variances					-8		-27
Admin and Law							
Democratic Services	1,886	-276	1,800	-318	-128	Underspend on Members pay £59k & travelling costs £43k, along with an additional £27k of income for work undertaken for the HRA	-122
Democratic Services - Support	506	0	454	-35	-87	ERW (£7k) & PCC (£7k); Posts vacant for part of year, expecting to be filled from Jan. There are also savings on supplies & services.	-67
Land Charges	136	-305	91	-281	-20	Savings on supplies & services	-33
Legal Services	1,898	-267	1,857	-259	-33	2 vacant posts during the year. Expected to be filled imminently.	-21
Central Mailing	45	0	28	-3	-20	Saving on franking machine leasing costs.	-19

Chief Executive Department - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021	Notes	Aug 2021
	Expenditure	Income	Expenditure	Income	Forecasted Variance for Year		Forecasted Variance for Year
	£'000	£'000	£'000	£'000	£'000		£'000
Marketing & Media							
Marketing and Media	373	-167	503	-119	178	Overspend on salaries pending divisional realignment. Loss of income streams from external partners (e.g. ERW £80k). Looking at alternative potential partnership arrangements	199
Translation	566	-52	464	-52	-102	Vacant post pending divisional realignment & number of staff members working reduced hours, savings on supplies & services	-91
Customer Services Centres	1,141	-353	933	-350	-205	10 vacant posts during the year, six anticipated to be filled before year end. Difficulty in filling posts currently.	-119
Yr Hwb, Rhydaman a Llanelli	191	-94	78	-53	-73	3 vacant posts pending divisional realignment offset partly by less income, due to decreased demand for desk rental space	-61
Statutory Services							
Registration Of Electors	170	-2	249	-94	-12	Savings on supplies & services	7
Registrars	441	-307	522	-419	-32	Additional income being generated compared to budget.	-35
Coroners	372	0	357	0	-15	Following the appointment of medical examiners by the NHS, fewer cases are being referred to the Coroner leading to less direct and indirect costs. This is partly offset by additional costs as a result of a jury inquest during the year.	36
Electoral Services - Staff	294	0	238	0	-56	2 Vacant posts pending divisional realignment	-33
Other variances					-6		-7
Regeneration & Property							
Property	1,156	-88	1,041	-8	-35	Vacant posts due to be filled imminently, this partially offsets a shortfall in external income generated.	-12
Commercial Properties	33	-594	66	-494	133	General loss of income due to properties becoming vacant & no immediate prospect of re-letting	152
Provision Markets	596	-660	566	-515	115	General downturn in demand for stalls & consequent reduction in achievable rents. Partially offset by COVID19 income claim from WG for losses specifically attributable to COVID19.	128
Administrative Buildings	3,324	-777	3,162	-691	-76	Additional essential maintenance planned during the year. Offset by savings on utilities, as staff continue to work from home	-84
Industrial Premises	485	-1,482	358	-1,422	-67	Occupancy levels are still high despite the pandemic	-81
County Farms	76	-342	73	-315	24	Market forces dictate rent/ lease achievable.	14

Chief Executive Department - Budget Monitoring - as at 31st October 2021
Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021	Notes	Aug 2021
	Expenditure	Income	Expenditure	Income	Forecasted Variance for Year		Forecasted Variance for Year
	£'000	£'000	£'000	£'000	£'000		£'000
Livestock Markets	61	-213	57	-38	171	Majority of overspend relates to Nant y Ci. No rental income for 24 months for Nant y Ci as per the terms of the new agreement. Additional premises maintenance costs to obtain animal health and farm assurance licences.	137
Other variances					3		-2
Grand Total					-548		-342

Department for Communities
Budget Monitoring - as at 31st October 2021

PRE-CABINET 10th JANUARY 2022

Division	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year £'000	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000		
Adult Services										
Older People	63,364	-22,250	3,193	44,307	62,454	-22,735	3,193	42,912	-1,395	-1,002
Physical Disabilities	7,622	-1,875	276	6,023	8,174	-2,550	276	5,900	-123	-102
Learning Disabilities	40,834	-11,098	1,282	31,018	42,010	-10,951	1,282	32,341	1,323	1,353
Mental Health	10,263	-4,107	228	6,384	10,640	-4,093	228	6,775	391	334
Support	9,498	-8,009	1,133	2,621	9,635	-8,175	1,133	2,593	-28	-100
Homes & Safer Communities										
Public Protection	3,348	-1,248	532	2,633	3,671	-1,570	532	2,633	0	-14
Council Fund Housing	9,199	-7,996	1,021	2,224	13,141	-11,938	1,021	2,224	0	6
Leisure & Recreation										
Leisure & Recreation	16,203	-9,230	5,922	12,895	16,153	-9,179	5,922	12,896	0	-0
GRAND TOTAL	160,332	-65,814	13,585	108,104	165,878	-71,191	13,585	108,273	169	476

Department for Communities - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Adult Services							
Older People							
Older People - LA Homes	8,237	-3,891	8,219	-4,359	-486	Reduced costs associated with fewer beds occupied in conjunction with support from Hardship Fund	-425
Older People - Private/ Vol Homes	25,962	-12,918	25,539	-12,918	-423	Reduced costs associated with fewer beds occupied in conjunction with support from Hardship Fund	-417
Older People - Extra Care	774	0	853	0	79	Cwm Aur contract - savings proposals in previous years only partially delivered	73
Older People - LA Home Care	7,569	0	7,565	-81	-86	Part year vacant posts	-39
Older People - Private Home Care	8,984	-2,573	8,900	-2,573	-84	Decrease in hours being commissioned by the Council because of the lack of availability of care linked to recruitment and retention issues. Also, significant funding being received from Welsh Government under the Hardship Fund to help address the pressures in the sector.	65
Older People - Enablement	1,920	-444	1,834	-444	-85	Part year vacant posts	-41
Older People - Day Services	873	-82	738	-0	-53	Reduced provision of day services due to COVID19 restrictions	-74
Older People - Private Day Services	276	0	100	0	-176	Reduced provision of day services due to COVID19 restrictions	-201
Older People - Other variances					-81		57
Physical Disabilities							
Phys Dis - Private/Vol Homes	1,499	-306	1,235	-306	-264	Demand led - Reduced use of residential respite care due to COVID19	-346
Phys Dis - Community Support	185	0	115	0	-70	Reduction in provision of community based services due to COVID19 restrictions	-90
Phys Dis - Direct Payments	2,634	-589	2,925	-589	291	Demand for Direct Payments increasing as a consequence of fewer alternatives during COVID19 restrictions e.g. community support and respite	291
Phys Dis - Other variances					-80		43
Learning Disabilities							
Learn Dis - Private/Vol Homes	11,384	-4,373	12,226	-4,373	842	Pressure remains on this budget as alternative provision is unavailable due to COVID19 restrictions. Timelines for achieving savings have slipped as many of the initiatives require face to face contact with service users and providers.	832
Learn Dis - Direct Payments	3,916	-558	4,771	-558	855	Direct Payments increasing due to demand	882
Learn Dis - Group Homes/Supported Living	10,171	-2,254	10,562	-2,254	391	Rightsizing in Supported Living ongoing but delayed due to COVID19. Accommodation and Efficiency project plans for strategic longer term future accommodation options as well as current client group has experienced delays due to COVID19.	361
Learn Dis - Day Services	2,515	-405	2,315	-370	-165	Loss of income received, staff vacancies and client taxis not used. Reduced premises and running costs as building based provision is reduced due to social distancing regulations and alternatives provided.	-129

Department for Communities - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Learn Dis - Private Day Services	1,327	-82	881	-82	-446	Day Services significantly reduced. Where care has been reassessed and alternative has been provided, the additional cost is shown as an overspend in that budget.	-470
Learn Dis - Other variances					-154		-124
Mental Health							
M Health - Private/Vol Homes	6,203	-3,294	6,474	-3,294	271	Pressure remains on this budget as alternative provision is unavailable due to COVID19 restrictions. Timelines for achieving savings have slipped as many of the initiatives require face to face contact with service users and providers.	135
M Health - Group Homes/Supported Living	1,265	-410	1,514	-410	249	Rightsizing in Supported Living ongoing but delayed due to COVID19. Accommodation and Efficiency project plans for strategic longer term future accommodation options as well as current client group has experienced delays due to COVID19.	236
M Health - Direct Payments	148	-44	263	-44	115	Direct Payments increasing due to demand	113
M Health - Community Support	623	-76	505	-76	-118	No payment to Hafal Dom care grant scheme	-114
M Health - Other variances					-126		-36
Support							
Holding Acc-Transport	1,500	-1,773	1,520	-1,886	-93	Provision of additional services to support Hywel Dda	-145
Other Variances - Support					65		45
Homes & Safer Communities							
Public Protection							
PP Management support	104	-8	103	-29	-21	Under on Travel, photocopying & postages due to covid	0
PP Business Support unit	155	0	128	0	-27	Under on Travel, photocopying & postages & vacancies due to covid	0
Public Health	290	-14	276	-19	-19	Legal Fees & Internal Design de-committed for Corporate to pay	0
Noise Control	219	0	174	-0	-46	Under on salaries	-9
Animal Safety	162	0	125	-3	-40	Vacant Posts.	-20
Food Safety & Communicable Diseases	506	-38	520	-41	11	Overspend on Agency costs.	20
Financial Investigator	90	-410	171	-335	157	Delays in receipt from prosecutions	0
Other Variances					-15		-5

Department for Communities - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Council Fund Housing							
Penybryn Traveller Site	177	-130	179	-116	16	£27k Legal Fees & Costs	2
Temporary Accommodation	512	-110	1,797	-1,428	-33	Over achieved on Income	0
Social Lettings Agency	814	-818	844	-830	18	Additional maintenance costs	3
Other Variances					-0		1
Leisure & Recreation							
Millennium Coastal Park	254	-138	281	-191	-26	Higher level of income achieved than budgeted	0
Pendine Outdoor Education Centre	534	-346	506	-298	20	Includes £22k R & M not budgeted	9
Pembrey Beach Kiosk	0	-42	0	-79	-37	Higher level of income achieved than budgeted	-40
St Clears Leisure Centre	151	-43	248	-42	98	Estimated cost of planned maintenance	96
Llandovery Swimming Pool	345	-239	311	-226	-22	In year staff vacancies	-33
Actif Facilities	295	0	267	0	-27	Capital recharge not budgeted £22k plus smaller expenditure underspends	-27
Actif health, fitness and dryside	199	-125	211	-165	-28	Grant award not budgeted £20k plus in year vacancy	-37
Catering - Sport Centres	346	-290	324	-290	-22	In year staff vacancies	0
PEN RHOS 3G PITCH	16	-36	8	-39	-12	Higher level of income achieved than budgeted	-16
ESD Rev Grant - Ynys Dawela	44	-43	4	-16	-12	Backdated grant award not budgeted	4
Pembrey Country Park Restaurant	422	-326	473	-338	39	Includes £40k R & M not budgeted	16
Museum of speed, Pendine	86	-26	80	0	20	Museum Development consultancy fees not budgeted	21
Museums General	150	0	214	-18	46	Unable to fully achieve vacancy factor	50
Archives General	141	-3	163	-2	23	Part year effect of new Archive Assistant not budgeted	28
Arts General	16	0	0	0	-16	Vacant post being held pending restructure	-16
St Clears Craft Centre	107	-38	63	-33	-39	In year vacancies	-28
Laugharne Boathouse	151	-114	133	-108	-12	Forecast underspend on Materials for Resale due to COVID restrictions	-11
Entertainment Centres General	468	-62	383	-24	-47	In year staff vacancies	-50
Leisure Management	439	0	456	-1	16	Tour of Britain costs	-3
Other Variances					41		37
Grand Total					169		476

Corporate Services Department
Budget Monitoring - as at 31st October 2021

PRE-CABINET 10th JANUARY 2022

Division	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year £'000	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000		
Financial Services	13,576	-2,592	-856	10,128	12,898	-2,430	-856	9,611	-517	-517
Revenues & Financial Compliance	63,504	-43,246	-830	19,428	62,996	-43,113	-830	19,053	-375	-133
GRAND TOTAL	77,079	-45,838	-1,686	29,556	75,893	-45,543	-1,686	28,664	-892	-650

Corporate Services Department - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Financial Services							
Accountancy	1,748	-467	1,736	-465	-10	£34k part year net vacancies, due to be filled during the year, offset by overspends on consultant, software and subscriptions,	-26
Treasury and Pension Investment Section	265	-195	228	-212	-54	£34k part year vacancies, due to be filled during the year. £20k external SLA income from the WPP and other smaller underspends	-38
Payments	557	-77	500	-74	-55	£36k part year vacancies, due to be filled during the year. £19k savings on supplies and services	-38
Audit Fees	322	-93	281	-93	-42	A proportion of audit fees are chargeable directly to grants	-40
Bank Charges	68	0	58	0	-11	Charges reduced since introduction of new contract	-19
Miscellaneous Services	8,230	-122	7,812	-63	-359	£346k underspend on pre LGR pension costs, £13k underspend on Treasury Management costs	-335
Other variances					14		-21
Revenues & Financial Compliance							
Procurement	611	-35	533	-35	-79	£79k part year vacancies, due to be filled during the year.	-47
Audit	487	-19	432	-35	-70	£34k part year vacancies, £21k saving on supplies and services along with £15k additional income over budget from SLA income	-26
Business Support Unit	142	0	108	0	-34	£29k part year vacancy, due to be filled during the year along with £5k savings on supplies and services	-24
Corporate Services Training	60	0	35	0	-25	Low uptake of training courses during year	-9
Council Tax Reduction Scheme	16,828	0	17,400	0	572	Increased demand since COVID19. WG contribution received for the shortfall in 2020/21, but no confirmation to date whether that will be replicated in 2021/22	572
Rent Allowances	41,323	-41,540	40,961	-41,472	-294	Predicted underspend based on anticipated payments due, anticipated reimbursement from DWP and recovery of overpayments.	-294
Rates Relief	328	0	195	0	-133	Low take-up anticipated in 2021/22	-133
Resourcing Benefits Admin	1,684	-752	1,279	-663	-316	A number of posts have been vacant during the year to date. Some of these will now not be filled until the new financial year. A large number of staff members are also currently on lower points of the salary scale but budgeted at the top of scale. This amounts to a saving of £403k. A £15k saving on supplies and services costs is also anticipated. This is offset by the ongoing annual reduction in admin grant received from DWP.	-173
Other variances					4		1
Grand Total					-892		-650

Department for Education & Children
Budget Monitoring - as at 31st October 2021

PRE-CABINET 10th JANUARY 2022

Division	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year £'000	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000		
Schools Delegated Budgets	141,558	-19,748	0	121,810	146,299	-19,748	0	126,551	4,741	5,625
Reserve utilisation				0		-4,741		-4,741	-4,741	-5,625
Director & Strategic Management	1,829	0	-109	1,720	1,381	0	-109	1,272	-448	-801
Education Services Division	7,668	-3,074	17,981	22,575	8,674	-3,975	17,981	22,680	105	228
Access to Education	3,577	-100	1,410	4,887	10,370	-6,769	1,410	5,011	124	142
School Improvement	2,514	-523	460	2,451	3,645	-1,629	460	2,477	26	16
Curriculum & Wellbeing	8,323	-4,103	895	5,115	9,577	-5,334	895	5,138	23	133
Children's Services	25,120	-6,730	2,711	21,102	28,610	-10,048	2,711	21,273	171	289
TOTAL excluding schools	49,031	-14,529	23,348	57,850	62,257	-27,754	23,348	57,851	0	5
GRAND TOTAL	190,589	-34,277	23,348	179,660	208,556	-52,244	23,348	179,660	0	5

Department for Education & Children - Budget Monitoring - as at 31st October 2021
Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Director & Strategic Management							
Director & Management Team	1,423	0	973	0	-450	Travel, supplies & services etc across dept savings identified towards 2022/23 efficiency requirement. This is supporting in year pressures detailed below across other service areas & has reduced from August as a result of growth budget being allocated to service areas.	-800
Other variances					2		-1
Education Services Division							
School Redundancy & EVR	1,925	0	2,019	0	93	Forecast based on known redundancies year to date & £100k contingency for late notifications	84
Early Years Non-Maintained Provision	1,269	-919	1,564	-1,437	-223	Grant income facilitating the release of core budget for other service in year pressures	-0
Special Educational Needs	3,998	-2,155	4,579	-2,538	197	Staffing costs for additional classes in attached units £160k & additional statements approved £530k, partially funded (-£500k) by other services having part year vacancies & utilising core budget where grant funding has been applied.	97
Sensory Impairment	361	0	405	0	44	Increased staffing required to meet demand, recruitment to be progressed once funding identified	47
Other variances					-7		-1
Access to Education							
School Modernisation	124	0	211	-37	50	£41k closed schools & £9k additional transport costs following school reorganisations	45
School Meals & Primary Free Breakfast Services	3,148	-100	9,768	-6,637	83	Primary school free breakfasts voluntary income shortfall £90k. Forecasts include high levels of sickness cover £200k and increasing food costs £190k, along with reduced income £100k, partially funded (-£500k) by other services having part year vacancies & utilising core budget where grant funding has been applied	93
Other variances					-9		4
School Improvement							
School Effectiveness Support Services	517	0	506	-16	-27	Maximising grant income for core budget to support other pressures	-11
National Model for School Improvement	805	0	897	-40	52	One off costs re ERW partially offset by part year vacant posts	26

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Department for Education & Children - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Curriculum and Wellbeing							
Music Services for Schools	1,037	-727	1,203	-853	40	Forecast SLA income not sufficient to cover projected staffing costs - vacant posts to be reviewed for affordability	41
Education Other Than At School (EOTAS)	2,380	-150	2,765	-485	50	Increase in demand for placements at PRUs requiring additional staffing	62
Youth Offending & Prevention Service	1,769	-991	2,027	-1,302	-53	Additional Grant allocation from WG - Support for Young People in Wales, offsetting core budget to support other services areas as continue to provide reduced services in some areas & recruiting pressures due to covid challenges	4
Adult & Community Learning	631	-631	608	-624	-16	Delays in recruitment	-2
School Information Systems	320	-28	305	-28	-15	Part year vacancy	-3
Other variances					17		32
Children's Services							
Commissioning and Social Work	7,241	0	7,556	-209	106	Increased staffing costs forecast at this stage in the year (£281k) and overspend forecast on legal costs (£105k) - more external providers being used as a result of increased sickness levels internally and also complexity of cases, partially offset by part year vacancies across the dept (-£280k)	149
Fostering Services & Support	4,176	0	4,244	0	68	Increase in Special Guardianship Orders (SGO's)	60
Adoption Services	540	0	1,070	-474	56	Adoption costs remain high with a further increase in projected costs of inter agency fees £35k, panel member costs £21k	21
Garreglwyd Residential Unit	466	-202	1,083	-820	-0	Assumes £497k income from Hywel Dda Health Board	0
Respite Units	971	0	954	-2	-19	Recruitment delays and 1 officer partially grant funded	27
Short Breaks and Direct Payments	803	-75	969	-181	59	Overspend due to increased Direct Payments demand since change in legislation, further increase linked to COVID19 £125k and also increased demand for 1-2-1 support under Short Breaks, due to lack of available building based services £92k. This is partially offset by in year vacancy £58k & £100k efficiencies across the dept.	61
Family Aide Services	111	0	285	-208	-34	Maximisation of grant income, partially offsetting overspends elsewhere within the division	-39

Department for Education & Children - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021	Notes	Aug 2021
	Expenditure	Income	Expenditure	Income	Forecasted Variance for Year		Forecasted Variance for Year
	£'000	£'000	£'000	£'000	£'000		£'000
Other Family Services incl Young Carers and ASD	509	-268	699	-484	-26	Part year vacancy (-£11k). Sessional workers, travel and activity costs for Young Carers (-£15k) as not currently running clubs or holiday activities (COVID19 guidance)	13
School Safeguarding & Attendance	398	-120	718	-505	-65	Maximisation of grant income, partially offsetting overspends elsewhere within the division	-81
Other Variances					27		78
Grand Total					0		5

Environment Department
Budget Monitoring - as at 31st October 2021

PRE-CABINET 10th JANUARY 2022

Division	Working Budget				Forecasted				Oct 2021 Forecasted Variance for Year £'000	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000	Expenditure £'000	Income £'000	Net non- controllable £'000	Net £'000		
Business Support & Performance	4,219	-3,784	489	923	5,694	-5,295	489	888	-35	-2
Waste & Environmental Services	26,581	-4,590	1,364	23,355	27,697	-5,745	1,364	23,316	-39	-37
Highways & Transportation	61,720	-40,273	10,632	32,079	63,721	-42,072	10,632	32,282	203	60
Property	32,248	-30,504	-56	1,688	41,027	-39,669	-56	1,303	-385	-252
Planning	4,959	-1,944	330	3,345	4,812	-1,994	330	3,148	-198	-127
GRAND TOTAL	129,726	-81,094	12,759	61,390	142,953	-94,775	12,758	60,936	-455	-358

Environment Department - Budget Monitoring - as at 31st October 2021

Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Business Support & Performance							
Emergency Planning	76	0	62	0	-14	LRF commitment covered by WG grant for 2021/22 (£11k); post not at top of budgeted scale point (£3k).	-13
Business Support	-87	-35	-103	-35	-17	A few vacant posts to be filled before year end.	-6
Departmental - Core	48	0	63	0	15	H&Wellbeing posts not budgeted for (£11k); previous year efficiency not yet delivered.	15
Departmental - Policy	6	0	-17	0	-22	Vacant post now filled	-0
Other variances					2		2
Waste & Environmental Services							
SAB - Sustainable Drainage approval Body Unit	127	-130	115	-66	53	Anticipated income not materialised - Dependent on number of submissions and market buoyancy of development projects	63
Cleansing Service	2,700	-129	2,722	-188	-37	Vacant posts to be filled imminently following review	3
Green Waste Collection	555	-435	534	-463	-49	Increased customer base	-43
Other variances					-7		-60
Highways & Transportation							
Design Services CHS Works	4,068	-4,329	4,368	-4,720	-91	Increased income from internal recharges reflecting work projected during the year.	-51
Property Design - Business Unit	2,848	-3,176	3,229	-3,627	-70	Increased income from internal recharges reflecting work projected during the year.	-3
Transport Strategic Planning	402	0	362	0	-40	Project Management fees recovered from grants	-0
Section 106 Transport schemes	0	0	1	-14	-14	Income received in 2021/22 for expenditure incurred in previous years	-14
School Transport	11,770	-923	12,306	-1,043	417	Additional operating days plus supply chain tender prices are increasing	0
Traffic Management	581	-70	1,049	-580	-42	Net increase in Traffic Regulation orders income	-13
Car Parks	2,068	-3,134	2,075	-3,026	116	Volume of anticipated ticket sales does not match budgeted levels	165
Nant y Ci Park & Ride	82	-34	118	-56	14	Reduced demand on the service	16
Road Safety	184	0	129	-0	-55	Underspend due to vacant post being filled part way during the year, an officer working part time and time recharged to grants	-30
School Crossing Patrols	154	0	142	-2	-14	Vacancies on some sites need to be filled.	-9
Public Rights Of Way	978	-79	945	-64	-18	Vacant posts and 1 employee working reduced hours	-0
Other variances					1		-2

Environment Department - Budget Monitoring - as at 31st October 2021
Main Variances

PRE-CABINET 10th JANUARY 2022

Division	Working Budget		Forecasted		Oct 2021 Forecasted Variance for Year £'000	Notes	Aug 2021 Forecasted Variance for Year £'000
	Expenditure £'000	Income £'000	Expenditure £'000	Income £'000			
Property							
Property Division Business Unit	140	0	97	0	-43	Net effect of the transfer of the previous Head of Property post holder	-0
Property Maintenance Operational	26,918	-28,233	34,664	-36,329	-350	Increased income from internal recharges reflecting work projected during the year, including significant unexpected projects.	-251
Other variances					8		-0
Planning							
Planning Admin Account	352	-16	342	-58	-52	Savings on supplies and services and vacant posts including the part-year effect of the Head of Service vacancy (now filled)	-94
Building Regulations Trading - Chargeable	441	-492	411	-432	30	Shortfall in income anticipated	86
Policy-Development Planning	706	-2	572	-2	-134	£79k underspend due to staff vacancies and £55k savings on consultants fees both due to covid-related delay in the LDP process	-136
Development Management	1,693	-935	1,691	-878	55	Shortfall in income anticipated	57
Conservation	471	-13	473	-52	-37	Vacant post estimated to be filled in January 2022	-29
Net Zero Carbon Plan	129	0	88	0	-41	Vacant post estimated to be filled before year-end and savings on various fees/costs	0
Other Variances					-18		-10
Grand Total					-455		-358

Housing Revenue Account - Budget Monitoring as at 31st October 2021

	Working Budget £'000	Forecasted £'000	Oct 21 Variance for Year £'000	Notes	Aug 21 Forecasted Variance for Year £'000
Expenditure					
Repairs & Maintenance					
Responsive	1,950	2,536	586	Forecast expenditure based on spend to date. Increased demand due to backlog created by COVID19 restrictions.	578
Minor Works	3,271	1,800	-1,471	Potential capacity issues within Minor Works Framework due to increase in volume of work being procured, options being explored with Contractors to increase capacity.	-1,471
Voids	3,717	3,855	139	Overspend on Council Tax costs due to increased Void properties over longer periods.	193
Servicing	1,826	1,866	40	Prediction based on current spends and values of works done after 7 months	38
Drains & Sewers	151	126	-25	Prediction based on current spends and values of works done after 7 months	-31
Grounds	816	816	0		0
Unadopted Roads	113	113	0		0
Supervision & Management					
Employee	5,758	5,366	-393	Vacant posts primarily in Home Improvement Team (-£143k) and Strategic Housing Delivery Team (-£75k)	-286
Premises	1,170	1,148	-22		10
Transport	74	47	-27	Reduction in staff travel due to working from home.	-44
Supplies	938	1,109	171	Mainly legal fees and costs	13
Recharges	1,783	1,822	39	Linked to vacant posts for capitalised salaries	0
Provision for Bad Debt	594	594	0		0
Capital Financing Cost	15,068	14,724	-344	Lower MRP than budgeted for, due to less borrowing in 2020/21 outturn. Also additional grants to support capital programme have reduced the forecast borrowing from £16.4m to £14.8m	-155
Central Support Charges	1,742	1,731	-11		-11
DRF	11,333	11,333	0		0
Total Expenditure	50,303	48,985	-1,318		-1,165

Housing Revenue Account - Budget Monitoring as at 31st October 2021

	Working Budget £'000	Forecasted £'000	Oct 21	Notes	Aug 21
			Variance for Year £'000		Forecasted Variance for Year £'000
Income					
Rents	-42,025	-41,999	26	Prediction close to target for rent due and voids	34
Service Charges	-816	-810	6		10
Supporting People	-68	-68	0		0
Interest on Cash Balances	-23	-8	15		15
Grants	-246	-305	-59	Overachievement of income linked to Welsh Government grants.	-53
Insurance	-213	-213	0		0
Other Income	-457	-464	-7		-0
Total Income	-43,847	-43,866	-19		5
Net Expenditure	6,456	5,119	-1,337		-1,159

HRA Reserve	£'000
Balance b/f 01/04/2021	19,444
Budgeted movement in year	-6,456
Variance for the year	1,337
Balance c/f 31/03/2022	14,325

CABINET 17th JANUARY 2022

CAPITAL PROGRAMME 2021/22 UPDATE

Purpose: To report the latest projected outturn of the capital programme for the financial year and to agree the reprofiling of the budget.

Recommendations / key decisions required:

1. That the capital programme update report is received.
2. That the new projects are noted and agreed.

Reasons:

1. To provide an update of the latest budgetary position for the 2021/22 capital programme, as at the 31st October 2021.

Relevant scrutiny committee to be consulted N/A

Cabinet Decision Required YES

Council Decision Required NO

CABINET MEMBER PORTFOLIO HOLDER:

Cllr. David Jenkins

Directorate: Corporate Services

Name of Head of Service:
Randal Hemingway

Report Author: Randal Hemingway

Designations:

Head of Financial Services

Tel: 01267 224886

Email addresses:

RHemingway@cararthenshire.gov.uk

EXECUTIVE SUMMARY CABINET 17th JANUARY 2022

CAPITAL PROGRAMME 2021/22 UPDATE

The current capital programme is based on information available as at the end of October 2021. **Appendix A** shows a forecasted net spend of £74,790k compared with a working net budget of £105,168k, giving a **-£30,378k** variance. The variance projected at this time relates mainly to delays with regeneration projects.

The net budget includes the original H.R.A. and General Fund capital programmes approved by Council on 3rd March and slippage from 2020/21 and, amendments approved by Cabinet on 25th October 2021. Some of the budgets have also been amended to account for differences in actual grant allocations compared with the anticipated allocations at the time the programme was approved.

Appendix B details the main variances within each department.

New Projects to note and approve for the current year:

Private Housing: Additional grant has been awarded to the ENABLE programme of £338k. taking the total amount of grant for this project to £307k in 2021/22 which is 100% funding by the grant.

Social Care: £375k has been awarded in Intermediate Care Fund (ICF) grant funding for various projects.

Regeneration: As part of Westminster Government's Levelling Up programme across the United Kingdom the Carmarthen West and Pembrokeshire South bid was successful in attracting £15.86m grant funding for the Carmarthen Hub. The grant requires a match funding from the County Council of £3.748m. This funding will be identified as part of the five-year budget setting process, however, £544k match funding is required in 2021/22 for the initial stages of the project. It is proposed to fund this from underspends within the current year and slip the variance as negative slippage to future years at the end of year.

Environment: The Dinefwr bid for Levelling up was also successful and awarded £16.775m to deliver the Towy Valley Path. This bid requires £1.864m match funding from the County Council which will be identified as part of the five-year budget setting process. £563k match funding is required during the current year and it is proposed to fund this from underspends on other projects and slip the variance as negative slippage to future years. As part of the current five-year programme, in-house council funding was reduced against this project as it had historically not been supported by external funds, however, a

commitment was given to restore that funding should external funding materialise. Supporting the match funding for this this project will deliver on that commitment.

Education and Children: £600k ICF grant has been awarded for the refurbishment of the residential accommodation at Rhydygors.

Slippage to future years of the five-year capital programme.

Regeneration: £20.594m of expenditure on City Deal projects to be slipped forward to future years to correlate with the construction phase.

Environment: £6.249m of expenditure on the fleet replacement programme. social welfare buses, refuse and highways lorries not being replaced in this financial year.

The slippage will be built into future years of the five-year capital programme.

DETAILED REPORT ATTACHED?	YES
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IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: **Randal Hemingway** **Head of Financial Services**

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
NONE	NONE	YES	NONE	NONE	NONE	YES

3. Finance

The capital programme shows an in-year forecasted variance of **-£30,378k** against the 2021/22 approved budget as at 31st October 2021.

7. Physical Assets

The capital programme will have an impact on the physical assets owned by the Authority.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Randal Hemingway Head of Financial Services

(Please specify the outcomes of consultations undertaken where they arise against the following headings)

1. Scrutiny Committee

Relevant Scrutiny Committees will be consulted.

2. Local Member(s) N/A

3. Community / Town Council N/A

4. Relevant Partners N/A

5. Staff Side Representatives and other Organisations N/A

**CABINET MEMBER PORTFOLIO
HOLDER(S) AWARE/CONSULTED**
NO

Include any observations here

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
2021/22 Capital Programme		Corporate Service Department, County Hall, Carmarthen. On-line via corporate website – Minutes of County Council Meeting 3 rd March 2021.

Capital Programme 2021/22							
Capital Budget Monitoring - Report for October 2021							
	Working Budget			Forecasted			Variance for Year
Department	Expenditure £'000	Income £'000	Net £'000	Expenditure £'000	Income £'000	Net £'000	
Public Housing	40,223	-8,845	31,378	37,025	-9,375	27,650	-3,728
Private Housing	3,908	-307	3,601	2,598	-307	2,291	-1,311
Leisure	4,355	-1,261	3,094	2,667	-359	2,308	-787
Social Care	1,109	-712	397	804	-472	332	-65
Environment	35,343	-17,072	18,270	36,761	-19,601	17,160	-1,110
Education & Children	27,877	-7,293	20,584	18,589	-6,645	11,943	-8,641
Chief Executive	2,544	0	2,544	1,786	-179	1,606	-938
Regeneration	40,227	-14,929	25,298	19,527	-8,027	11,500	-13,799
TOTAL	155,587	-50,419	105,168	119,756	-44,966	74,790	-30,378

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Capital Programme 2021/22								
Capital Budget Monitoring - Report for October 2021 - Main Variances								
DEPARTMENT/SCHEMES	Working Budget			Forecasted			Variance for Year £'000	Comment
	Expenditure £'000	Income £'000	Net £'000	Expenditure £'000	Income £'000	Net £'000		
COMMUNITIES								
- Public Housing	40,223	-8,845	31,378	37,025	-9,375	27,650	-3,728	
Sewage Treatment Works Upgrading	184	0	184	74	0	74	-110	
Internal and External Works (Property)	16,164	0	16,164	17,469	0	17,469	1,305	Acceleration of voids work.
Environmental Works (Housing Services)	380	0	380	616	0	616	236	Garages investment programme accelerated. Overspend will be covered within department.
Adaptations and Equalities Works (Building Services)	1,500	0	1,500	1,500	0	1,500	0	
Programme Delivery and Strategy	896	0	896	707	0	707	-189	Owing to staffing vacancies.
Housing Development Programme	20,900	-1,020	19,879	16,459	-1,550	14,910	-4,970	Delays at Tyisha and engineering works at other sites in addition to ongoing COVID19 related delays.
CX Housing Assets - Asset Management System	200	0	200	200	0	200	0	
MRA and IHP Grants Income	0	-7,825	-7,825	0	-7,825	-7,825	0	
- Private Housing	3,908	-307	3,601	2,598	-307	2,291	-1,311	
Disabled Facilities Grant (DFG)	3,033	0	3,033	2,000	0	2,000	-1,033	We have a further 400 enquiries that are yet to be assessed. Therefore, despite there being the demand to spend the full budget because of the available resources and contractor capacity the likely spend will be lower.
Renewal Area: Remedial Works	41	0	41	41	0	41	0	Remedial Works to be funded from Capital Receipts.
ENABLE - Adaptations to Support Independent Living	307	-307	0	307	-307	0	0	Additional award of grant from Welsh Government.
Travellers Sites	27	0	27	27	0	27	0	Funded by a revenue contribution.
Empty Properties Initiatives	500	0	500	223	0	223	-278	Project slipped to 2022/23.
- Leisure	4,355	-1,261	3,094	2,667	-359	2,308	-787	
Carmarthen Leisure Centre & Track	0	0	0	37	0	37	37	Retentions to be covered from within the capital programme.
Amman Valley Leisure Centre Masterplan	10	0	10	11	0	11	1	Project slipped to future years.
Oriol Myrddin Redevelopment	1,887	-1,000	887	200	-100	100	-787	Contractor to be appointed by December 2021. Projected start on site March 2022. Project to slip into 2022/23.
Burry Port Harbour Walls	765	0	765	765	0	765	0	
Libraries & Museums	1,422	-150	1,272	1,422	-150	1,272	0	
Country Parks	271	-111	161	232	-109	123	-37	Majority of underspend is on the Pembrey Country Park Cycling Hub and will be utilised to cover spend on other projects, mainly the new BMX pump track.
- Social Care	1,109	-712	397	804	-472	332	-65	Slip to 2022/23.
ENVIRONMENT	35,343	-17,072	18,270	36,761	-19,601	17,160	-1,110	
Highways & Infrastructure	27,513	-17,072	10,441	29,449	-19,317	10,131	-310	Main slippages into 2022/23: -£291k Trebeddrod Reservoir, £166k Cross Hands Economic Link Road, -£214k Works at Nantycaws delayed because of fire. £566k Towy Valley Path match funding for Dinefwr Levelling Up Project.
Property	7,829	0	7,829	7,313	-284	7,029	-800	Slippage on works at Ty Elwyn.

Capital Programme 2021/22							Variance for Year £'000	Comment
Capital Budget Monitoring - Report for October 2021 - Main Variances								
DEPARTMENT/SCHEMES	Working Budget			Forecasted				
	Expenditure £'000	Income £'000	Net £'000	Expenditure £'000	Income £'000	Net £'000		
EDUCATION & CHILDREN	27,877	-7,293	20,584	18,589	-6,645	11,943	-8,641	
21stC - Band A - Design Stage Schemes	1,363	0	1,363	222	0	222	-1,141	Delays with acquiring land for Laugharne Primary School. Slippage on Rhydygors.
21stC - Band A - WG FBC Approved Schemes	6,753	0	6,753	5,755	0	5,755	-997	Slip to future years.
21stC - Band B - Design Stage Schemes	5,274	0	5,274	1,212	0	1,212	-4,062	Slip to 2022/23
21stC - Band B - WG FBC Approved Schemes	7,524	0	7,524	4,350	0	4,350	-3,174	Slip to 2022/23 (Castell, Pum Heol and Pembrey)
Education - Equality Act Works	0	0	0	343	0	343	343	Ongoing commitment to Equalities Act works.
Dyffryn Taff Bus Bays	176	0	176	120	0	120	-57	Urgent and critical works to be undertaken from within the existing capital budget. Works will continue into 2022/23.
Infant Class Size	799	-799	0	858	-809	49	49	Covered by MEP match funding.
Welsh Language Immersion Centre (Maes y Gwendraeth)	687	-364	323	947	-364	583	260	Initial project specification changed to allow cost effective creation of additional classrooms. Additional Costs to be covered by savings on other projects.
School Buildings - Education Capital Maintenance Grants	3,174	0	3,174	3,174	0	3,174	0	Funded from displaced 2020/21 monies. Grant received in 2020/21 but authorised by WG to be applied in other areas of capital to displace funds to deliver the education maintenance project in 2021/22.
Flying Start Capital Expansion Programme	675	-675	0	665	-665	0	0	
Childcare Offer Places	620	-620	0	360	-360	0	0	
Play Opportunities Grant Projects	50	0	50	50	0	50	0	Purchase of van funded from displaced 2020/21 monies. Grant received in 2020/21 and applied in other areas.
Rhydygors Intermediate Care Project	600	-600	0	213	-213	0	0	
MEP Income - 21 st Century Schools Grant	0	-4,234	-4,234	0	-4,234	-4,234	0	
Other Projects with Minor Variances	181	0	181	319	0	319	138	Other minor projects, retentions and provision expenditure.
CHIEF EXECUTIVE	2,544	0	2,544	1,786	-179	1,606	-938	
IT Strategy Developments	1,219	0	1,219	711	-179	531	-688	Slip to 2022/23.
Purchase of Grillo Site, Burry Port	414	0	414	0	0	0	-414	Saving against the purchase of the site.
Glanamman Industrial Estate Redevelopment	818	0	818	955	0	955	137	
Rural Estates	67	0	67	74	0	74	7	Additional expenditure covered by revenue contribution.
Other Projects with Minor Variances	27	0	27	46	0	46	20	Retention works on St David's Park buildings 2 and 14 and Refurbishment works to Block 3.

Capital Programme 2021/22							Variance for Year £'000	Comment
Capital Budget Monitoring - Report for October 2021 - Main Variances								
DEPARTMENT/SCHEMES	Working Budget			Forecasted				
	Expenditure £'000	Income £'000	Net £'000	Expenditure £'000	Income £'000	Net £'000		
REGENERATION	40,227	-14,929	25,298	19,527	-8,027	11,500	-13,799	
Swansea Bay City Region Projects	5,721	-5,521	200	3,089	-2,889	200	0	Majority of spend expected in 2022/23. Budget slipped to future years.
County Wide Regeneration Funds	6,972	-1,500	5,472	1,546	-750	796	-4,676	Delays on grants to third parties due to impact of COVID19 on project delivery timeframes. Project to slip to 2022/23.
Cross Hands East Strategic Employment Site Phase 1	668	0	668	668	0	668	0	
Cross Hands East Phase 2	513	-202	311	558	-301	257	-54	
Cross Hands East Plot 3 Development	7,335	-3,970	3,366	529	-429	100	-3,266	Construction expected to start in February 2022. Slip to 2022/23.
Valleys Town Centres	122	-122	0	65	-64	0	0	
Carmarthen Town Regeneration - Jacksons Lane	21	0	21	53	-33	21	0	
Carmarthen Old Town Quarter	702	0	702	150	0	150	-552	Detailed design to follow Greening Infrastructure masterplan outcome.
Pendine Iconic International Visitors Destination	2,846	-130	2,716	2,221	-130	2,091	-625	Currently in discussion with insurance company regarding storm damage claim, and in discussion with new contractor following contractor failure. Works will continue into the next financial year.
Llandeilo Market Hall	3,586	-821	2,764	2,255	-821	1,434	-1,331	Completion expected September 2022.
Ammanford Regeneration Development Fund	299	0	299	127	0	127	-171	Progress delays on third party schemes due to COVID19. Slipped to 2022/23.
Ammanford Town Centre Regeneration	21	0	21	21	-18	4	-18	
Levelling Up Fund Projects	0	0	0	2,920	-2,375	544	544	Carmarthenshire West and Pembrokeshire South Levelling up. Covered from underspends in other projects in 2021/22. Negative slippage to future years.
Town Centre Loan Scheme	1,400	0	1,400	1,400	0	1,400	0	Loan will be let this financial year for the Linc Llanelli. Funding already received from the Welsh Government.
TRI Strategic Projects - Market Street North	1,811	0	1,811	68	0	68	-1,744	Project called in by Welsh Government planning division.
TRI Strategic Projects - Former YMCA Building, Stepney Street, Llanelli	1,868	0	1,868	3,169	0	3,169	1,301	Funded by Strategic TRI allocation.
Transforming Town Centres Strategic Projects	4,211	-2,500	1,711	0	0	0	-1,711	Slip to 2022/23. External funding will be drawn down in advance of CCC monies that will be required in future years.
Business Support for Renewable Energy Initiatives	500	0	500	0	0	0	-500	Slip to 2022/23. Grant Programme to be launched in February 2022.
Ten Towns Growth Plan	1,000	0	1,000	0	0	0	-1,000	Slip to 2022/23. Expressions of interest to town and community councils being worked up.
Other Projects	632	-163	469	689	-218	471	2	Llanelli JV.
TOTAL	155,587	-50,419	105,168	119,756	-44,966	74,790	-30,378	

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CABINET MEETING 17 January 2022

<p>Subject: Local Toilets Strategy Interim Progress Report</p> <p>Purpose: An Interim Progress Report will be required to be published by February 2022</p>		
<p>Recommendations / key decisions required:</p> <p>To consider the information contained within this report and to endorse the draft Local Toilets Strategy Interim Progress Report.</p>		
<p>Reasons: Part 8 of the Public Health (Wales) Act 2017: Provision of Toilets places a duty on each local authority in Wales to prepare and publish a local toilets strategy for its area. The Act also places a duty on each local authority to publish an interim progress report within six months of the 2-year publication anniversary of the original Local Toilet Strategy. In Carmarthenshire’s case this will be in February 2022, as the original strategy was adopted in August 2019.</p> <p>The status of the published Local Toilet Strategy remains current as periodic updates have been made.</p>		
<p>Relevant scrutiny committee to be consulted YES</p> <p>Environmental & Public Protection Scrutiny Committee 22nd December 2021.</p>		
<p>Cabinet Decision Required</p>		<p>YES</p>
<p>Council Decision Required</p>		<p>NO</p>
<p>CABINET MEMBER PORTFOLIO HOLDER:- Cllr. Hazel Evans Cabinet Member for Environment</p>		
<p>Directorate: Environment</p>	<p>Designations:</p>	
<p>Name of Head of Service: Ainsley Williams</p>	<p>Head of Waste & Environmental Services</p>	<p>Tel: 01267 224500 Email addresses: AiWilliams@sirgar.gov.uk</p>
<p>Report Author: Rhys Davies</p>	<p>Municipal Services & Compliance Manager</p>	<p>Tel: 01267 224542 Email addresses: RJRDavies@sirgar.gov.uk</p>

**EXECUTIVE SUMMARY-
CABINET MEETING-
17 January 2022**

Local Toilets Strategy Interim Report

Part 8 of the Public Health (Wales) Act 2017: Provision of Toilets came into force on 31 May 2018 and placed a duty on each local authority in Wales to prepare and publish a local toilets strategy for its area.

There is no statutory requirement for local authorities to provide public toilets and the duty to prepare a strategy does not in itself require local authorities to provide and maintain public toilets themselves but are required to take a strategic view across their area on how these facilities can be provided and accessed by the local population.

The Act also requires local authorities to prepare an interim progress report setting out the steps taken in line with the strategy every two-year period from the date of the adopted strategy. This interim progress report is required to be published within six months of the end date of the two-year period.

Carmarthenshire County Council published its Local Toilets Strategy during August 2019. The strategy identified the following 10 key recommendations to enhance Carmarthenshire’s long term toilet provision:

- Review of all current toilet facilities – position/mapping and opening times
- Identify and encourage other council facilities to become more publicly available
- Establish partnership links with public/private companies and organisations
- Investigate options for a Community Partnership Toilet Scheme (CTS)
- Ensure adequate provision of Portable Toilet facilities such as during temporary events
- Encourage the installation of Changing Places toilets within appropriate new building developments
- Explore charging options to eradicate social misuse and vandalism where appropriate
- Improve Communication and Information on available toilet facilities
- To make available public toilet data on the Welsh Government Mapping Application (LLE National Map of toilets)
- Where appropriate, to consider the incorporation of toilet provision in accordance with planning policy and national planning guidance.

The attached report sets out progress made to date.

DETAILED REPORT ATTACHED?	YES
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IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: **A I Williams** **Head of Waste & Environmental Services**

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	YES	NONE	NONE	YES	NONE	NONE

1. Policy, Crime & Disorder and Equalities

Any increase in public toilets provision supports Wellbeing Objective 8 – Community Cohesion, Resilience & Safety (Live Well). It also supports Wellbeing Objective 9 – Supports older people to age well and maintain dignity and independence in later years (Age Well).

2. Legal

We have a statutory duty under Part 8 of the Public Health (Wales) Act 2017 to publish an interim progress report.

5. Risk Management Issues

Failing to publish an Interim Progress Report would result in the authority being non-compliant with the requirements of the Public Health (Wales) Act 2017 (Part 8 Provision of Toilets).

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **A I Williams** **Head of Waste & Environmental Services**

1. Scrutiny Committee - to be consulted

2. Local Member(s) - N/A

3. Community / Town Council - N/A

4. Relevant Partners - N/A

5. Staff Side Representatives and other Organisations - N/A

**CABINET MEMBER PORTFOLIO
HOLDER(S) AWARE/CONSULTED: YES**

Cllr. Hazel Evans is aware of the updates made since the initial strategy was published (as outlined in the detailed report) and endorses the interim progress report as set out.

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

THESE ARE DETAILED BELOW

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Carmarthenshire County Council's Local Toilets Strategy		https://www.carmarthenshire.gov.wales/media/1219856/local-toilets-strategy.pdf
Public Health (Wales) Act 2017		https://www.legislation.gov.uk/en/anaw/2017/2/contents

Local Toilets Strategy

Interim Progress Report

February 2022

DRAFT

carmarthenshire.gov.wales

Cyngor **Sir Gâr**
Carmarthenshire
County Council



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Introduction

Carmarthenshire County Council published its Local Toilets Strategy in August 2019 following the introduction of the Public Health (Wales) Act 2017, Part 8, which places a duty on local authorities to prepare and publish a local toilets strategy for its area.

The strategy sets out the long-term strategic view on how these facilities can be provided and accessed by our local population and visitors alike.

The aim of the strategy is to enable a broader consideration of options available for providing toilets for public use, ranging from traditional stand-alone public toilets through to toilets in private ownership, and to increase the number of publicly available toilets by entering into partnerships with businesses, making available facilities in suitable Council buildings and to encourage the integration of accessible facilities into any new building development where practicable.

There is no statutory requirement for local authorities to provide public toilets, however, the aim of the strategy is to mitigate potential impacts where there may be a loss of toilet facilities and to enhance provision by additional creative ways.

The Public Health (Wales) Act 2017, Part 8, also requires local authorities to prepare and publish a progress report following a two-year period from first publication. This progress report therefore outlines what we have achieved to date in line with the action plan therein.

The purpose of this report has not been to undertake a fundamental review of Local Toilets Strategy, rather it is an assessment of progress made to date.

Carmarthenshire County Council's Local Toilets Strategy identified ten recommendations to support and enhance public convenience availability and awareness within the County.

Summary of Local Toilets Strategy Recommendations

In partnership with the British Toilet Association, Carmarthenshire County Council's Local Toilets Strategy identified 10 key recommendations to enhance Carmarthenshire's long term toilet provision:

1. Review of all current toilet facilities – position/mapping and opening times
2. Identify and encourage other council facilities to become more publicly available
3. Establish partnership links with public/private companies and organisations
4. Investigate options for a Community Partnership Toilet Scheme (CTS)
5. Ensure adequate provision of Portable Toilet facilities such as during temporary events
6. Encourage the installation of Changing Places toilets within appropriate new building developments
7. Explore charging options to eradicate social misuse and vandalism where appropriate
8. Improve Communication and Information on available toilet facilities
9. To make available public toilet data on the Welsh Government Mapping Application (LLE National Map of toilets)
10. Where appropriate, to consider the incorporation of toilet provision in accordance with planning policy and national planning guidance.

Progress on Delivering the Benefits of the Strategy

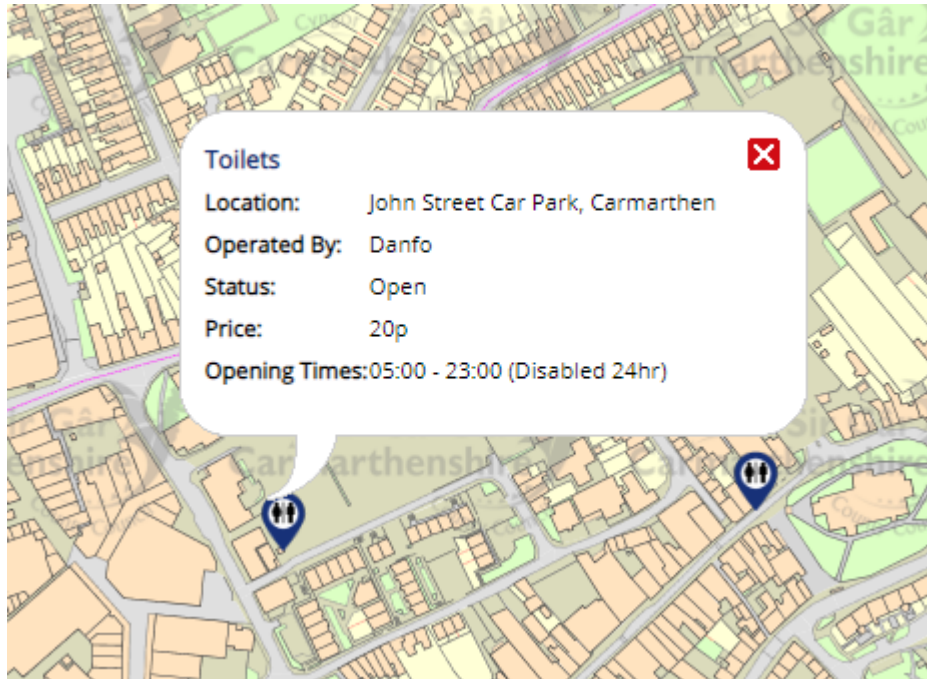
To date, in line with the recommended actions within the strategy, we have increased the number of identified publicly available facilities from forty to sixty-three. This represents an increase of 57 percent.

1. Review of all current toilet facilities – position/mapping and opening times

A review of Carmarthenshire County Council and Town/Community Council traditional standalone public toilet facilities has been undertaken. These facilities have been mapped on the Carmarthenshire County Council corporate website. Each mapped location has additional data (by zooming in and clicking on the relevant location icon, figure 2) to incorporate opening times, operational responsibility, and provides information on whether any charges apply. (See figure 1 & 2)



(Figure 1)



(Figure 2)

This review identified several other facilities which have since been added to the corporate website mapping details including relevant individual information.

2. Identify and encourage other council toilet facilities to become more publicly available

A review of in-house facilities was also undertaken to identify appropriate publicly accessible buildings where individual location, access and circumstances would allow use by members of public such as libraries, leisure centres and office locations. This review identified a further fifteen toilet facilities which have been added to Carmarthenshire County Council's corporate website and the Welsh Government's Lle Mapping facility. A small number of toilets within the Authority's buildings were deemed unsuitable for public use due to the remote location of the facilities from the building entrance or public area.

The following additional existing locations were identified and listed as suitable for public access:

- Ty Elwyn, Llanelli
- Ffwrnes, Llanelli
- Lyric, Carmarthen
- St. Clears Leisure Centre

- Newcastle Emlyn Leisure Centre
- Municipal Buildings, Crescent Road, Llandeilo
- Carmarthen Leisure Centre
- Llanelli Leisure Centre
- Ammanford Library
- Llandovery Library
- Carmarthen Library
- Amman Valley Leisure Centre
- Llandovery Swimming Pool
- Llanelli Library
- Burry Port Library

3. Explore potential partnership links with public/private companies and organisations

Due to the pandemic situation, this action has been temporarily delayed. As Covid-19 restrictions ease, and cases of transmission stabilise and crucially, confidence grows amongst companies and organisations, they can then be approached to establish their appetite to help with respect to suitable provision in future.

4. Community/Comfort/Partnership Toilet Scheme (CTS)

The Community Toilet Partnership is a managed scheme which aims to tap into the already available toilet provision on a more formal basis to enhance existing provision. The scheme allows members of the public to use the toilet facilities in a range of approved local businesses and other organisations during their opening hours without purchasing any goods or services. Participating premises undertake to keep their toilets safe, clean, hygienic, easily accessible, and well-stocked. In return, they receive an annual grant payment based on the range of facilities they are able to offer.

Participants in the scheme are also required to display a sticker in their window (the National Logo scheme signage provided by Welsh Government) and agree to their facilities being regularly inspected without prior notification, for quality, accessibility, and cleanliness. It is anticipated that the businesses may see increased footfall which in turn may encourage users to return to those businesses in the future.

Again, due to the ongoing concerns amongst businesses in relation to the Covid-19 pandemic, activity on the initiative (Community Toilet Scheme across the County) was suspended shortly following its inception, as lockdown had essentially closed most accessible toilets in shopping centres and other business establishments.

Initially, the Pensarn shopping area in Carmarthen was identified as a high priority area due to lack of available provision. Following discussions with all relevant business establishments in the vicinity, one retail outlet was identified as having appropriately positioned toilet facilities which could be made available to the public. Consequently, this establishment participated in the scheme prior to the national lockdown.

There remains concerns from business premises in general to open their facilities to non-customers because of the ongoing Covid-19 situation. However, as the severity of the pandemic diminishes and confidence returns, it is anticipated that many suitable businesses will be amenable to the scheme. As such, a targeted approach to appropriate business premises should facilitate an increase in publicly available toilets as the pandemic situation stabilises.

5. Portable Toilet Provision

For larger events, advice regarding the adequate provision of sanitary facilities at events is provided by the Events Safety Advisory Group for Carmarthenshire. The Advisory Group includes representatives from the County Council (highways/traffic management, environmental health, licensing, marketing), Dyfed Powys Police, Mid and West Wales Fire and Rescue Service, Welsh Ambulance Service, and the South Wales Trunk Road Agency. Events which are referred to the Safety Advisory Group and requested to produce an Event Management Plan in addition to any licence application.

Example Event Management Plan templates are available to download from Carmarthenshire County Council's Corporate website and include a relevant section on toilet provision/consideration.

For smaller events that may not be referred to the Safety Advisory Group there is a specific Licensing For Events page, [Licensing for events \(gov.wales\)](#) which includes a link to the toilet strategy.

Event organisers are advised on the appropriate toilet provision in line with the online Purple Guide which has been written in consultation with the Events Industry Forum and the Health & Safety Executive.

The current guidance on portable toilet provision at events is shown in the table below.

	Female Toilets	Male Toilets
For events with a gate time of less than 6-hours duration opening	1 per 100	1 per 500, plus 1 urinal per 150
For events with a gate opening time of 6 hours or more, but with little or no alcohol or food served	1 per 85	1 per 425, plus 1 urinal per 125
For events with a gate opening time of 6 hours or more, with alcohol and food served in quantity	1 per 75	1 per 400, plus 1 urinal per 100
For campsites at major events, swapping the emphasis from urinal to WCs for males	1 per 75	1 per 150, plus 1 urinal per 250

6. Changing Places Toilets

As standard accessible toilets do not meet the need of all people with a disability, some people often need extra space and equipment to allow them to use the facilities safely and comfortably. These needs are met by Changing Places toilets.

The Welsh Government has recently undertaken a consultation exercise on its proposals to increase the provision of Changing Places toilets and Baby Changing facilities in certain types of buildings and to revise the Approved Document M guidance on compliance with the Building Regulations (relating to access to and use of buildings). The proposals will allow local planning authorities to enhance the provisions of Changing Places toilets over and above the minimum requirement.

The responses to this consultation are currently being reviewed by Welsh Government and details of the outcome will be published in due course.

There are currently four Changing Places toilets in Carmarthenshire. These are located at Carmarthen (Cartrefi Cymru), Kidwelly (Parc Y Bocs Farm Shop and Café), Ammanford (Tesco) and a recently installed facility at Pembrey Ski and Activity Centre.

Further additional Changing Places toilets are planned at the following locations:

Pendine (Caban) Hostel – this location will benefit from all specified equipment required for a Changing Places facility, however, due to layout restrictions, it is unable to meet the exact

positional specification requirements. As such, this facility will not therefore be advertised as a full Changing Places unit.

Two Changing Places facilities are planned at the new Pentre Awel / Wellness Centre at Llanelli. This is part of a large-scale development project with current indication of completion during early 2024.

One further Changing Places unit is also planned within the ground floor of the Ffwrnes Theatre at Llanelli.

Changing Place facilities will be expected as an integral aspect of the design of most new Council Buildings and venue facilities where general public access is provided. Such a provision will be encouraged in other new non-Council owned public access buildings where appropriate.

7. Charging – helping to eradicate social misuse and vandalism

We are not experiencing any significant vandalism or social misuse in facilities which are not already subject to charging fees. Therefore, there is currently no intention to introduce charging mechanisms at additional locations. This situation will however be subject to ongoing review where the introduction of charging may be considered to deter misuse where continuous issues arise.

8. Improve Communication and Information on available toilet facilities

Detailed information on locations and opening times have been added to the Carmarthenshire County Council corporate website (public convenience map). Individual details at each location are displayed by clicking on the location icon. Detailed information is also provided via the Welsh Government's Lle Mapping portal.

Although the pandemic has delayed some of the marketing actions, the tourism sector is now fully open, and the County Council is undertaking a number of actions as part of its economic recovery plan

It was anticipated that parts of the UK would be very busy from Easter 2021 onwards when the major lockdown restrictions were lifted and the possibility of areas being overrun by the volume of tourists. To help manage the situation, the County Council set up a cross-departmental working group to meet on a weekly basis to manage the "Hot Spots" in Carmarthenshire and work together on resource allocation.

Part of the work undertaken was a customer satisfaction survey with over 400 face to face interviews being carried out. Overall responses were incredibly positive as to quality and enjoyment of experience. On the question "How would you rate the following aspects of your visit today?", 88% rated cleanliness of the public toilets as good or above. In the section on asking visitors what we could do to improve, and what visitors feel would improve

their perception of future visits, people responded that better signage and interpretation of information boards would be beneficial.

Our aim over Winter 2021 is to work with the newly formed 10 Towns working groups on the content and services required to be displayed on the information panels, which will be installed after conducting a customer flow analysis for each area. As identified in the visitor research, public toilets will be included and highlighted as a priority on these Visitor Information Points (VIP) signage. Draft examples of these Visitor Information Points (VIP) signage have now been produced for the majority of the towns within the County.

A further key promotional channel is the Discover Carmarthenshire website which is currently being refreshed. Public convenience information will be displayed on each town webpage in addition to the respective activity pages such as walking and road cycling.

9. To make available public toilet data on the Welsh Government Mapping Application (LLE National Map of toilets)

Detailed information on available toilet facilities has been provided to the Lle National Map of Toilets. The information provided to the portal for each facility is as follows:

- Location.
- UPRN (Unique Property Reference Number).
- Coordinates.
- Post Codes.
- Access notes (for example, whether any charges apply or whether there are any additional access factors such as steps).
- Daily opening hours.
- Off-peak season information (for example, change of opening hours and relevant times).
- Bank Holiday opening times (if different from normal operating times).
- Types of cubicles available (female / male / unisex / baby change / disabled (open access or whether RADAR key access) / changing places).

<https://datamap.gov.wales/maps/new?layer=inspire-wg:Toilets>

10. Where appropriate, to consider the incorporation of toilet provision in accordance with planning policy and national planning guidance.

As part of the preparation of the Revised Local Development Plan 2018 -2033 the intention has been to consider the opportunities for integrating guidance and policy requirements in respect of the provision of public facilities. The content of guidance will inform the preparation of the Local Development Plan and the outcomes of its preparatory process

will be reflected in future versions of the strategy. Where appropriate, matters around the incorporation and provision of toilet facilities within developments will be considered in accordance with planning policy and national planning guidance.

It is noted that the adoption of the Revised Local Development Plan has been delayed through the impacts arising from Covid-19 and the publication of Natural Resources Wales guidance on phosphate levels in identified protected Rivers. An update schedule for adoption will be made available in due course.

Next Steps

In line with internal guidance and dependent on the current COVID-19 circumstances, a targeted approach will be made to encourage appropriate businesses to participate in the Community Toilet Scheme. It is anticipated that this scheme will provide an increase in the number of publicly accessible toilet facilities available in key areas of need.

A continuous review will be undertaken of the currently identified toilet premises to include any changes to opening times and types of facilities available. Suitable additional premises will also be added to the list of available toilets, for example, new buildings / toilet facilities, appropriate office facilities and the planned Community Toilet Scheme locations.

The Local Toilets Strategy will be subject to formal review within a year of each ordinary election. The next election date in Wales is Thursday 5th May 2022. Therefore, the latest date for review of Carmarthenshire's Local Toilets Strategy will be the 4th May 2023.

Current List of Public Toilets

The facilities shown below are only indicative of general toilet provision within the County. Additional toilets may be available to the public but are not included here because they are not advertised as such. In particular, there will be commercial premises which provide customer facilities.

APPENDIX A

Carmarthenshire current public toilet provision

		Facilities available														Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Ammanford, Carregamman Car Park	SA18 3EL	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Carmarthen, John Street Car Park	SA31 1QT	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Carmarthen, St. Peter's Car Park	SA31 1LN	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Laugharne adjacent to Castle	SA33 4SP	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Llandeilo Car Park	SA19 6HL	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Llandovery Car Park	SA20 0AB	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Llanelli adjacent to Town Hall	SA15 3AH	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No

		Facilities available															
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)	
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)				
										male only	female only	unisex	male only	female only	unisex		
Llanelli East Gate Bus Station	SA15 1SG	No	No	Yes	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
St. Clears Car Park	SA33 4AG	No	No	Yes	No	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Abergorlech Village Centre	SA32 7SN	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Alltwalis Village Centre	SA32 7EB	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	No	Yes	No
Ammanford Central Park	SA18 3BE	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Ammanford Coop Car Park	SA18 1DL	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Brechfa Village Centre	SA32 7RA	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	No	Yes	No
Burry Port Railway Station	SA16 0EP	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Cenarth	SA38 9JL	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No

		Facilities available														Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Cynwyl Elfed	SA33 6TU	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Ferryside Beach Entrance	SA17 5TD	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	Yes	No
Glanamman Cwmamman Square	SA18 1DZ	No	No	Yes	No	No	Yes	No	No	No	No	No	No	No	Yes	No
Gorslas adjacent to Park	SA14 7HP	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	Yes	No
Kidwelly Town Centre	SA17 4UU	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Llanboidy Village Centre	SA34 0EL	Yes	Yes	No	Yes	Yes	No	No	Yes	No	No	No	No	No	Yes	No
Llanddowror Tenby Road	SA33 4HJ	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	Yes	No
Llanstephan Beach Car Park	SA33 5JX	Yes	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	Yes	No

		Facilities available														
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Llanybydder Square	SA40 9TX	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Meinciau adjacent to Community Hall	SA17 5LE	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Newcastle Emlyn near Mart	SA38 9AD	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Newcastle Emlyn Market Hall	SA38 9AS	No	No	Yes	No	No	No	No	No	No	No	Yes	No	No	No	No
Parry Thomas Centre Pendine Beach	SA33 4NY	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Whitland West Street	SA34 0AB	Yes	Yes	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No
Park Howard Llanelli	SA15 3JQ	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Llanelli Market	SA15 1YH	Yes	Yes	No	No	No	No	Yes	No	No	No	No	No	No	Yes	No
Carmarthen Market	SA31 1QY	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No

		Facilities available														
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Bristol House A48	SA4 0FS	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Meidrim Car Park	SA33 5QL	Yes	Yes	No	Yes	Yes	No	No	Yes	No	No	No	No	No	Yes	No
Llandybie	SA18 3HY	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Penygroes	SA14 7RP	Yes	Yes	No	No	No	No	No	No	No	No	No	No	No	Yes	No
Ffarmers	SA19 8LQ	Yes	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	No
Ffaldybrenin	SA19 8QR	Yes	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	No
Llansawel	SA19 7JF	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No
Pembrey Country Park Ski Centre	SA16 0EJ	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	Yes
Cefn Sidan Beach Kiosk	SA16 0EJ	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No
Ty Elwyn, Llanelli	SA15 3AA	Yes	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	No

		Facilities available														
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Yr Orsaf café, Pembrey Counrty Park (outside toilets)	SA16 0EJ	No	No	Yes	No	No	No	No	Yes	No	No	Yes	No	No	No	No
Ffwrnes, Llanelli	SA15 3YE	Yes	Yes	No	No	No	No	Yes	No	No	No	Yes	No	No	No	No
Lyric, Carmarthen	SA31 1BD	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No
St. Clears Leisure Centre	SA33 4BT	Yes	Yes	No	No	No	No	No	No	Yes	Yes	Yes	No	No	No	No
Newcastle Emlyn Leisure Centre	SA38 9LN	Yes	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	No
Municipal Buildings, Llandeilo	SA19 6HW	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No
Carmarthen Leisure Centre	SA31 3NQ	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No
Llanelli Leisure Centre	SA15 3AE	Yes	Yes	No	No	No	No	Yes	No	No	No	Yes	No	No	No	No
Ammanford Library	SA18 3DN	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No

		Facilities available														Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)	
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled							
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)				
										male only	female only	unisex	male only	female only	unisex		
Llandovery Library	SA20 0AA	No	No	No	No	No	No	No	No	No	No	No	Yes	No	No	No	No
Carmarthen Library	SA31 1LN	No	No	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	No
Amman Valley Leisure Centre	SA18 2NP	Yes	Yes	Yes	No	No	No	Yes	No	No	No	Yes	No	No	No	No	No
Llandovery Swimming Pool	SA20 ODY	Yes	Yes	Yes	No	No	No	Yes	No	No	No	Yes	No	No	No	No	No
Llanelli Library	SA15 3AS	No	No	No	No	No	No	No	Yes	No	No	No	No	No	No	Yes	No
Burry Port Library	SA16 OAE	No	No	No	No	No	No	No	No	No	No	Yes	No	No	No	No	No
Llyn Llech Owain Country Park	SA14 7NF	Yes	Yes	No	No	No	No	No	Yes	No	No	Yes	No	No	No	No	No
Carmarthen Park	SA31 3AX	No	No	Yes	No	No	No	No	Yes	No	No	No	No	No	No	Yes	No
Adjacent to North Dock Discovery Centre Llanelli	SA15 2LF	No	No	Yes	No	No	No	No	No	No	No	Yes	No	No	No	No	No

		Facilities available														
Name of Location	Postcode	Male only	Female only	Unisex toilet	Baby change					Disabled						Changing places (incorporating adult changing facilities, hoists etc. for people with profound disabilities and their carers)
					male toilet	female toilet	unisex toilet	Separate to toilets	disabled toilet	Open access			Locked (RADAR)			
										male only	female only	unisex	male only	female only	unisex	
Pembrey Country Park Play Area Car Park	SA16 0EJ	No	No	Yes	No	No	Yes	No	Yes	No	No	Yes	No	No	No	No
Burry Port Harbour (West)	SA16 0ER	No	No	Yes	No	No	No	No	No	No	No	Yes	No	No	No	No

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**EXECUTIVE SUMMARY
CABINET
17TH JANUARY 2022**

POSSIBLE AMENDMENT TO THE PRIVATE SECTOR RENEWAL POLICY

An enquiry for a DFG can be made by disabled person who is the owner of the dwelling or a tenant if the property is rented.

DFGs are available to provide essential adaptations to give the applicant better freedom of movement into and around their home and to access essential facilities within the home. An Occupational Therapist assesses the individual and makes a recommendation for what they consider “necessary and appropriate “to meet the needs of the disabled person.

The mandatory DFG is means tested to calculate if an applicant can afford a contribution towards the cost of the required adaptation. The maximum grant that can be awarded is £36,000.

Attached to the DFG are grant conditions relating to the repayment of the grant if the property is sold with 10 years of the grant being completed (with certain exception). These conditions apply to DFGs that exceed the sum of £5,000 and are registered as Local Land Charge.

Example of repayment if the property is sold:

<u>DFG paid</u>	<u>Amount Repayable</u>
Up to £5000	No repayment
£6000	£1000
£12,000	£7,000
£36,000	£31,000

In 2018 the Wales Audit Office (WAO) published a report on Housing Adaptations which found that to improve the delivery time of DFGs the Welsh Government should review whether DFGs should continue to be means-tested. Subsequently, the Public Accounts Committee undertook an inquiry into the issues raised by the WAO and recommended that the Welsh Government reviewed current approaches to the means test, among other proposed reforms.

The means test for DFGs is required by legislation (with certain exemptions, such as people on particular benefits), with details of how this test must be conducted set out in regulations. Removing the means test from the mandatory DFG process would require new legislation. However, local authorities can already carry out adaptations without requiring a means test using powers granted under the Regulatory Reform Order (2002).

The Welsh Government has issued updated non-statutory guidance to local authorities recommending the removal of the means test for small and medium adaptations.

What is categorised as a small or medium adaptations?

The Welsh Government's Housing Adaptations Service Standards define the type of work involved within each category. The guidance states that, while medium and large adaptations are funded through DFGs and subject to a means test, small adaptations tend to be delivered differently.

Small adaptations in the private sector within Carmarthenshire tend to be delivered through our partners in Carmarthenshire Care and Repair therefore the proposed changes will mainly have implications for the means test for medium grants.

Small

- Grab rails
- Stair rails
- Small ramps
- Accessible taps
- Key safes
- Mop stick handrails
- Outdoor rails
- External / staircase lights
- Additional electrical sockets

Medium

- Walk in showers
- Stair lifts
- Large ramps
- A combination of adaptations installed as one job

Large

- Building an extension to provide a downstairs bedroom and/or bathroom
- Through floor lift
- Significant internal structural modifications e.g. relocate a bathroom or kitchen

Who would be affected from the removal of the means test

Applicants that would benefit from the removal of means testing:

- Low-medium income households with mortgages would benefit if they were assessed to be able to afford a contribution but are unable to afford it in practice. Many have limited savings and the housing costs calculations do not necessarily take actual costs into account.
- Households with high incomes would benefit even though they could afford adaptations without the use of public funds

Applicants that these changes will not affect:

- Low-income households already on means-tested benefit would not benefit as they would be assessed through means test as having a nil contribution for DFGs.
- Disabled adults in need of large adaptations would not benefit as this form of assistance will continue to be means tested.

It is important to note that no applicant would be disadvantaged by these proposed changes.

Applicant's contribution through a means test in previous years

The table below summarises the value of applicants means tested contributions over the last 6 years. Between 10% to 16% of DFGs completed each year have a means tested contribution towards the cost of works with an average contribution of £1,178.48. The yearly average total value of applicant's contributions made over the last 6 years is £32,075.83

6 year Analysis of contributions				
Number of DFGs Completed	Number of DFGs with Contributions	% of DFGs that have contributions	Average value of contribution in a year	Average contribution
1,066	146	14%	£32,075.83	£1,178.48

The above information sets out the known likely additional demand on future budgets. What is not known is how many perspective applicants are currently deterred from applying for a DFG because of the means test. This could be because they know their contribution would exceed the cost of the required works or they do not wish to disclose their financial information. It is likely, therefore, that the annual cost to the Authority of the means test being removed will be higher than the current average of £32K.

Case example

Mr E worked in the financial sector prior to his retirement. Following his retirement Mr E had a stroke which resulted in him requiring home adaptations to enable him to live safely. Due to the nature of Mr E's previous employment and the monthly pension he now receives Mr E did not approach the Authority for assistance as he knew his income would result in a means test contribution that would exceed the cost of the work required. Mr E and his family paid for his home to be adapted to meet his needs themselves.

Impact on the service

The full impact of this proposed changed is unknown, however possible implications are: -

- Increased demand for DFGs resulting in additional Occupational Therapy assessments on top of the significant backlog that we are currently working through.
- Applicants waiting longer for their home to be adapted
- Additional demand on the available budget.
- Further pressure on contractor availability to undertake the required adaptations

In 2005, the means test was removed for works for children and young people and we did not see any significant increase in applications. It should be noted, however, that works for children and young people represent a small proportion of cases (6% of all DFGs completed in 2020/21.)

The impact of this proposed change will be continuously monitored throughout the first year and any increases in enquiries, delay in delivery times or budget pressures will be recorded.

Options to respond to the Welsh Governments request

Option 1

Continue with the current process of only providing adaptations to homeowners through the mandatory Disabled Facilities Grant which includes a means test and not amending the Private Sector Renewal Policy

Option 2

Comply with the Welsh Government's request and offer DFGs without a means test for small and medium adaptations as part of our Renew Policy and apply the 10 years grants conditions already outlined in the Housing Grant Construction and Regeneration Act.

Option 3

Offer DFGs without a means test for small and medium adaptations as part of our Renew Policy and apply lifetime conditions that the grant would be repayable in full on disposal of the property with no exemptions.

Option 4

Give the applicant a choice of:

- proceeding with option 2, with no means test and 10 years repayment conditions attached to a discretionary DFG, or
- to apply for a mandatory DFG and be means tested.

DETAILED REPORT ATTACHED?

NO

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Jonathan Fearn Head of Housing Property and Strategic Projects

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	NONE	YES	NONE	NONE	YES	NONE

Policy, Crime & Disorder and Equalities

The Report sets out the Welsh Government’s request for each Local Authority to consider. The policy decision is, however, a matter for the County Council.

Finance

The table below summarises the value of applicants means tested contributions over the last 6 years. Between 10% to 16% of DFGs completed each year have a means tested contribution towards the cost of works with an average contribution of £1,178.48. The yearly average total value of applicant’s contributions made over the last 6 years is £32,075.83

6 year Analysis of contributions				
Number of DFGs Completed	Number DFGs with Contributions	% of DFGs that have contributions	Average value of contribution in a year	Average contribution
1,066	146	14%	£32,075.83	£1,178.48

The above information sets out the known likely additional demand on future budgets. What is not known is how many perspective applicants are currently deterred from applying for a DFG because of the means test. This could be because they know their contribution would exceed the cost of the required works or they do not wish to disclose their financial information. It is likely, therefore, that the annual cost to the Authority of the means test being removed will be higher than the current average of £32K.

The DFG budget within the Council Fund Capital Programme 2021/22 – 2025/26 is £2m per year.

Staffing Implications

It is likely that removal of the means test would increase the number of DFG applications which would put pressure on existing staff resources. Staff resources would need to be monitored and potentially increased to ensure turnaround times are met if the volume of applications increases beyond expectations.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Jonathan Fearn Head of Housing Property and Strategic Projects

1. Scrutiny Committee N/A
2. Local Member(s) N/A
3. Community / Town Council N/A
4. Relevant Partners N/A
5. Staff Side Representatives and other Organisations N/A

**CABINET MEMBER PORTFOLIO
HOLDER(S) AWARE / CONSULTED**

Cllr Linda Evans has been consulted and agrees with the recommendations

Section 100D Local Government Act, 1972 – Access to Information List of Background Papers used in the preparation of this report:

THESE ARE DETAILED BELOW

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Wales Audit Office: Housing Adaptations (2018)		https://audit.wales/system/files/publications/housing-adaptations-2018-english.pdf
Welsh Government: Housing Adaptations Standards of Service (2019)		https://gov.wales/sites/default/files/publications/2019-04/housing-adaptations-standards-of-service.pdf
Welsh Government Written Statement: Removing the means test on small and medium Disabled Facilities Grants.		https://gov.wales/written-statement-removing-means-test-small-and-medium-disabled-facilities-grants

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CABINET

17th JANUARY 2022

<p>Subject</p> <p>NOTICE OF MOTION REFERRED FROM COUNCIL (10TH NOVEMBER 2021) JAPANESE KNOTWEED</p>		
<p>Recommendations / key decisions required:</p> <p>1. To consider the Notice of Motion regarding Japanese Knotweed and to agree on any further actions.</p>		
<p>Reasons:</p> <ul style="list-style-type: none"> Full Council, at its meeting held on the 10th November 2021, referred a Notice of Motion in respect of Japanese Knotweed to the Cabinet. 		
<p>Relevant scrutiny committee to be consulted NO Cabinet Decision Required YES Council Decision Required NO</p>		
<p>CABINET MEMBER PORTFOLIO HOLDER: Councillor Philip Hughes – Cabinet Member for Public Protection</p>		
<p>Directorates: Communities</p> <p>Jonathan Morgan</p> <p>Llinos Jenkins</p>	<p>Head of Homes and Safer Communities</p> <p>Cabinet Support Officer</p>	<p>jmorgan@carmarthenshire.gov.uk</p> <p>LISJenkins@carmarthenshire.gov.uk</p>

CABINET SUMMARY

17th JANUARY 2022

NOTICE OF MOTION REFERRED FROM COUNCIL (10TH NOVEMBER 2021) JAPANESE KNOWTWEED

At County Council on the 10th of November, the following Notice of Motion was agreed and is presented to Cabinet for further discussion:

That Council:

- Notes the decision made by the Plaid and Independent administration in 2016 to not [respond] to or taking any formal action with regards to requests on private properties regarding Japanese Knotweed and other invasive non-native plants, which was, and still is, in line with the approach of other Welsh Councils;
- Recognises that the Anti-Social Behaviour, Crime & Policing Act 2014 gave powers to Councils to issue 'Community Protection Notices' to tackle knotweed on private land that has a detrimental effect on the quality of life of the locality and is persistent and unreasonable;
- Notes that, outside Wales, Bristol has utilised these powers to support residents, who have had their lives negatively impacted by the failure of landowners to manage knotweed;
- Calls on this Plaid and Independent administration to reverse their decision and start utilising Community Protection Notices (CPNs) to support to tackle the issue of knotweed on private land causing a detrimental impact residents in many Carmarthenshire communities, and also calls on Welsh Government to urge other councils to consider taking similar action.

The following information may assist the Cabinet in their discussion –

Issues:

1. The powers available to LAs to deal with the issue of invasive weeds (including Japanese Knotweed) are limited. There are provisions, however, contained within the Antisocial Behaviour, Crime and Policing Act 2014, using (CPNs) which in principle would allow the council against a landowner who had JN on their land
2. There are also powers contained within the Wildlife and Countryside Act 1981 which makes it an offence for anyone to plant or cause the species to grow in the wild (this includes undertaking activities that contributes to its spread). This is enforced by the Police.
3. The CPN Powers are rarely used by Local Authorities to tackle Japanese Knotweed, although there are some limited examples.

The main concerns in using CPNs include:

1. A CPN should not be served if the problem affects just one property. This is because to serve a CPN the presence of the Japanese Knotweed at a particular location must cause a nuisance to the wider public
2. Japanese Knotweed is not a species that has any adverse public health effects.
3. For a CPN to be served, the presence of Japanese Knotweed at that location **must** have a detrimental effect on the quality of life of those in the wider locality; be of a persistent or continuing nature; and be unreasonable. This is a subjective assessment and must be evidence based.
4. The Identification of landowners will be an issue in many cases where Japanese Knotweed has established on unregistered / vacant land
5. The treatment of Japanese Knotweed can be very costly and lengthy, requiring a long-term treatment plan; one season of spraying or injection will not be sufficient to control the species. There is likely to be a three-year minimum treatment. In some cases, a 10-year treatment plan will be required and, even then, there is no guarantee of absolute success. Costs vary, but generally three-year treatment plan can be expected to cost in the region of £1,500 for a small-scale domestic property to £3-£4,000 for a more heavily infected domestic property. The prices will vary depending on contractor used and site-specific circumstances. In any event, a contractor who is Property Care Association Registered will be required.
6. Non-compliance with a CPN is an offence. Individual householders, therefore, who receive a CPN will be criminalised if they are unable to afford the cost of undertaking the work to treat the Japanese Knotweed on their land properly. This would disproportionately impact on poorer households in the County.
7. Due to the long-term nature of the treatment, the compliance with a notice could take several years to determine. Although a recognised treatment plan would aid in this regard, LA's cannot stipulate that one should be entered into – recipients would be free to choose how they remove the knotweed. This could lead to householders attempting “DIY” treatments which could cause more harm through unintended consequences e.g. uncontrolled application of chemicals and burning and risk spreading the Japanese Knotweed even further.
8. The full scale of the problem both at a county and national level is not clear. A ‘Heat map’ published by the Woking based company Environet Uk Ltd earlier this year relied on members of the public reporting sightings of Japanese Knotweed. This identified over 500,000 locations nationally, with particularly high concentrations in urban and former industrial areas in North West England, the Midlands, London and South Wales. Swansea and Llanelli were in the top 10 locations nationally, although the heat map shows hundreds of locations across the County where Japanese Knotweed has been reported. It is possible however, that this is an underreporting of the level of Japanese Knotweed due to the way in which the data is gathered.

9. Given the complex and lengthy nature of any investigation into and subsequent treatment of JN, there would be a considerable resource required to undertake this function across the County. There is no current capacity within existing resources to carry out this work.
10. In the event of non-compliance with a CPN, the Council would have the option of carrying out works in default and recovering the cost from landowners. This would place a financial burden on the Council. Again, there would be no guarantee that the works in default would eradicate the JN and the Council would be at risk of compensation claims if the works in default caused damage to the landowner's property. It may prove difficult to recover any costs from poorer households.
11. The Royal Institute of Chartered Surveyors (RICS) are in the process of updating their guidance to establish a management framework that sets out how house sales can proceed, even where knotweed is found. This is likely to have an impact on the decision process when considering whether a CPN is appropriate.
12. Large land owners in Carmarthenshire, including the Council and NRW, proactively maintain their areas of land and treat JN where it is evident. A policy of issuing CPNs will therefore impact predominantly on individual householders.

Alternative approaches to enforcement by way of CPN

Given the impact of enforcement action on householders, both in terms of cost and possible criminal sanction, the Council could consider the following alternative approaches:

- Continue with its current practice of advising affected landowners and signposting them to sources of guidance. This is the approach adopted by most local authorities; and
- Viewing the situation as a commercial opportunity to offer Japanese Knotweed treatment services to the public, either directly on a cost recovery basis or more commercially through a potential trading company. Expertise in this area would be needed to develop and implement.

DETAILED REPORT ATTACHED?	No
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IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Jonathan Morgan, Head of Homes and Safer Communities

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
YES	YES	YES	NO	YES	YES	NO

Policy, Crime & Disorder and Equalities

Current Environmental Protection Policies do not include provision for dealing with Japanese Knotweed as a “nuisance” species. If the decision not to investigate is reversed, policies will need to be reviewed and updated accordingly.

Non-compliance with any enforcement action will be a criminal offence, which may disproportionately affect poorer residents who do not have the financial means to carry out works that are required.

Legal

The primary legal powers to deal with invasive plants, including JK, are specified in points 1 and 2 in the Executive Summary.

Finance

Additional resources would be required to deal with this matter including taking enforcement action or legal redress where required. Further work would be needed on more accurate financial implications

Risk Management

A decision to deal with JK without adequately resourcing could result in a failure to deliver the function. This could lead to additional risks to the Authority from our Corporate Complaints process and the Public Services Ombudsman for Wales.

The Council will continue, however, to control and limit growth of JK on its own land.

Staffing implications

A decision to deal with Japanese Knotweed will have implications on staff resourcing. It will lead to an increase in workloads and public expectation in an area of work that will require substantial training and expertise to deliver.

It will also require the necessary staff resources to deal with lengthy and complex investigations which are sufficiently robust to withstand any enforcement / legal challenges.

CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **Jonathan Morgan, Head of Homes and Safer Communities**

1.Scrutiny Committee

Not applicable

2.Local Member(s)

Not applicable

3.Community / Town Council

Not applicable

4.Relevant Partners

Not applicable

5.Staff Side Representatives and other Organisations

Not applicable

**CABINET PORTFOLIO HOLDER(S)
AWARE/CONSULTED - YES**

Cllr Philip Hughes supported the NoM at the County Council meeting on the 10th November

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Council Meeting 15 th September 2021 Link to agenda and minutes		Agenda for County Council on Wednesday, 10th November, 2021, 10.00 am (gov.wales)

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

N/A

CABINET

17th JANUARY 2021

<p>Subject</p> <p>NOTICE OF MOTION REFERRED FROM COUNCIL (15TH SEPTEMBER 2021) VENTILATION IN SCHOOLS</p>		
<p>Recommendations / key decisions required:</p> <p>To consider a Notice of Motion on Ventilation in Schools.</p>		
<p>Reasons: Council at its meeting held on the 15th September referred a Notice of Motion in respect of ventilation in schools to the Cabinet.</p> <p>The Cabinet will need to formally consider this motion and consider the proposals therein.</p>		
<p>Relevant scrutiny committee to be consulted NO Cabinet Decision Required YES Council Decision Required NO</p>		
<p>EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER: Councillor Glynog Davies – Education and Children’s Services</p>		
<p>Directorates : Education and Children’s Services</p> <p>Simon Davies</p> <p>Llinos Jenkins</p>	<p>Head of Access to Education</p> <p>Cabinet Support Officer</p>	<p>LISJenkins@cararthenshire.gov.uk</p>

CABINET SUMMARY

17th JANUARY 2022

NOTICE OF MOTION REFERRED FROM COUNCIL (15TH SEPTEMBER 2021) VENTILATION IN SCHOOLS

On the 15th of September 2021, Council considered the following Notice of Motion submitted by Councillor Glynog Davies:-

“Council notes that the Delta variant of SARS-CoV-2 is infecting children and young people at an unprecedented rate, yet schools in Wales have reopened with no remedial mechanisms in place to protect pupils and staff.

As it’s an airborne virus, ventilation and clean air is key in the battle against SARS-CoV-2, as recognised by the *Joint Union Guide to Improving Ventilation in Schools and Colleges* (Sept 2021) and the Welsh Government strategy to provide CO2 monitoring equipment. However, monitors are not a solution to poor ventilation: they just indicate that there is a problem and remedial action should be taken.

This council notes that the ozone technology proposed by the Welsh Government, for which £3.3m funding was allocated, has been put on hold following safety concern by medical experts. We also note HSE advice that the most suitable equipment for use in rooms with poor ventilation are:

- High Efficiency Particulate Air (HEPA) filters which are no less than 99.97% efficient at capturing human-generated viral particles associated with SARS-CoV-2 (*Centres for Disease Control and Prevention; Ventilation in Buildings; update 2 June 2021.*) and:
- Ultraviolet-based devices

This council therefore calls on Welsh Government to urgently consider approving, tendering and funding UV-C and /or HEPA units, as recommended by the HSE and validated as being appropriate and safe for use by the WHO, The Lancet and other leading medical authorities and publications”

The Notice of Motion was supported and passed to Cabinet for consideration.

DETAILED REPORT ATTACHED?

No

IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report:

Signed: Simon Davies, Head of Access to Education

Policy, Crime & Disorder and Equalities NONE	Legal NONE	Finance NONE	ICT NONE	Risk Management Issues NONE	Staffing Implications NONE	Physical Assets NONE
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CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Simon Davies, Head of Access to Education

1.Scrutiny Committee

Not applicable

2.Local Member(s)

Not applicable

3.Community / Town Council

Not applicable

4.Relevant Partners

Not applicable

5.Staff Side Representatives and other Organisations

Not applicable

EXECUTIVE BOARD PORTFOLIO HOLDER(S) AWARE/CONSULTED YES

Cllr Glynog Davies proposed the NoM at the County Council meeting on the 15th September

Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Council Meeting 15 th September 2021 Link to agenda and minutes		Agenda for County Council on Wednesday, 15th September, 2021, 10.00 am (gov.wales)

**Section 100D Local Government Act, 1972 – Access to Information
List of Background Papers used in the preparation of this report:**

N/A

Title of Document	File Ref No.	Locations that the papers are available for public inspection