

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.

¹ Carmarthenshire 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

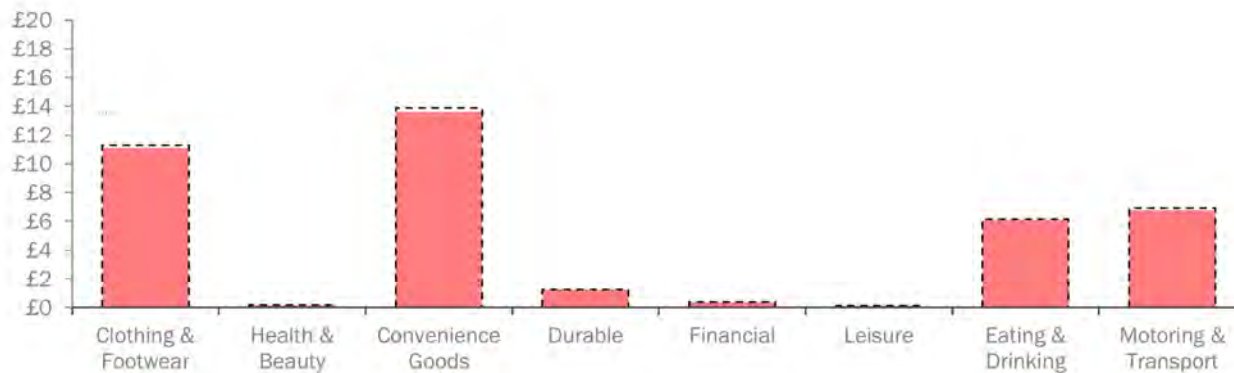
Category	% Using the centre
Affluent & prosperous	12%
Comfortable/modest means	40%
Financially stretched	41%

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.



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.

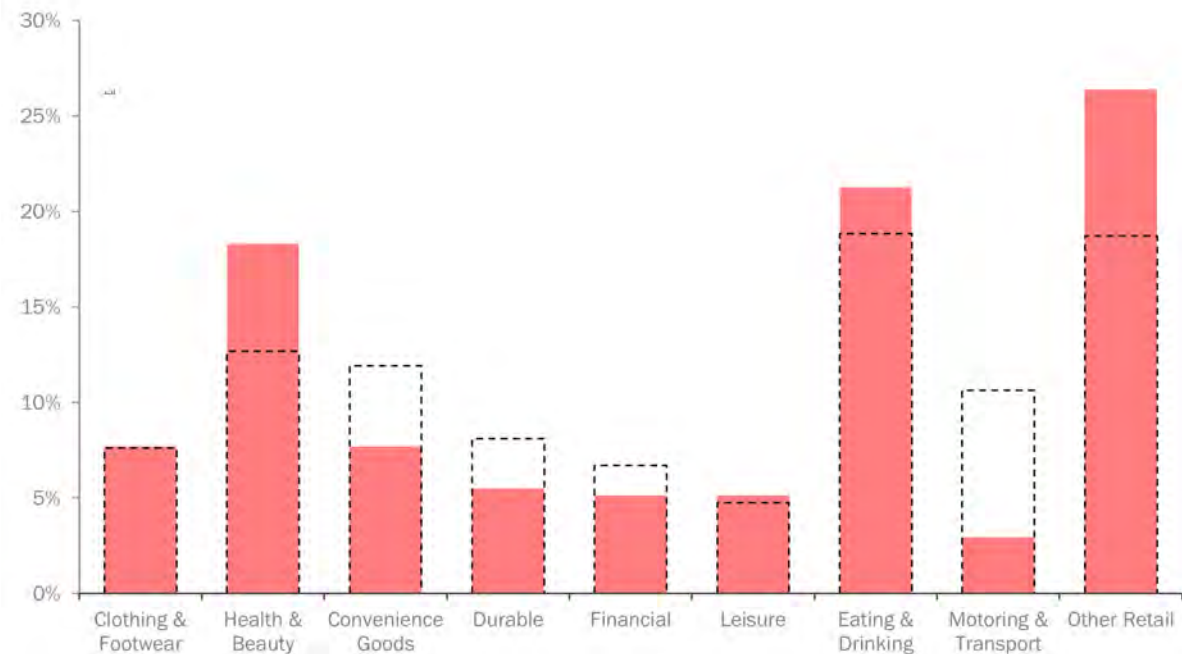


Figure 4: Town centre business footprint
Source: CACI 2020 – Dash line represent average for towns located in the Swansea Bay city region

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.



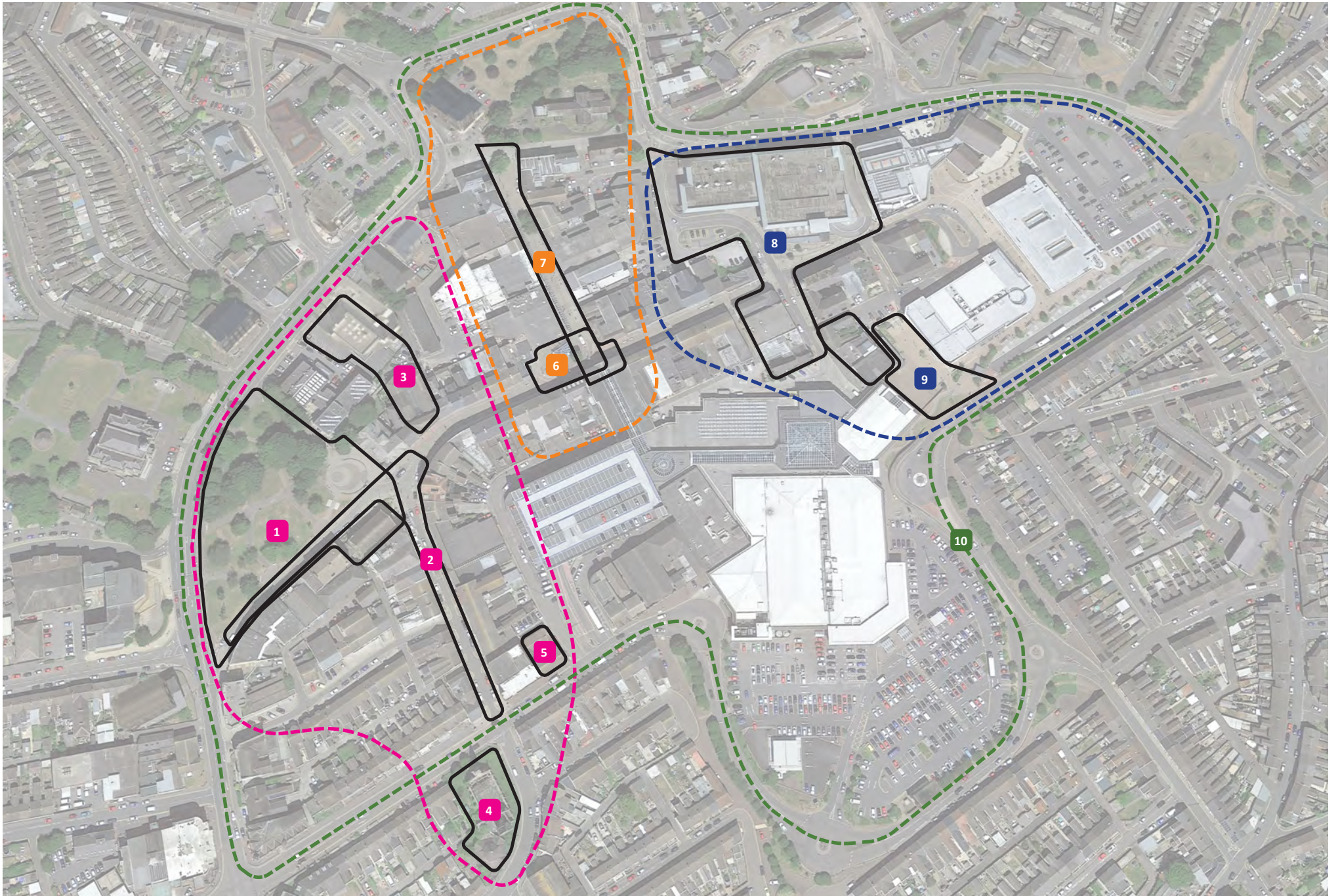
Eastgate Area

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.

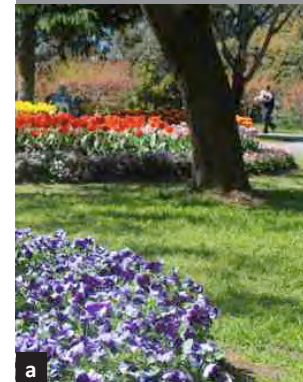
- Opportunities for seating.
 - Opportunities for more convivial lighting, potentially including LED pea lights set within the tree canopies.
 - Opportunities for pop-up street stalls, and associated tables and chairs, for cafe/ice-cream/street food vendors. The corner plaza may provide a suitable location 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.



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. In support of the feasibility study, undertake or commission the following:
 - 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
 - The highway works should incorporate 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.
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.

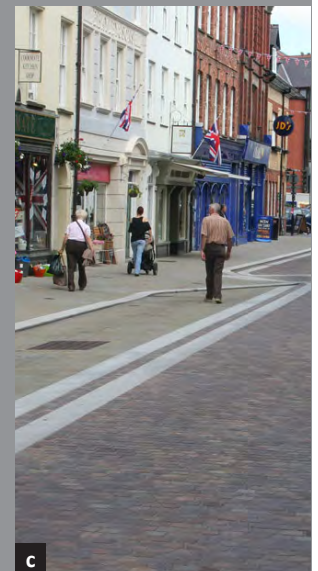


a Use of the pavement space in Cowell Street following temporary road closure

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.
3. 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:

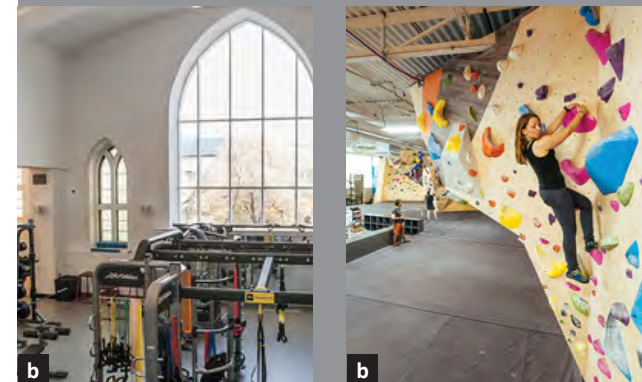
- Light-touch, minimal cost solutions that retain the architectural features with no/minimal need for additional structures, roofing, services, etc. This could include:
 - Commercial use as urban horticultural/ garden nursery (with play and café)
 - Formal adventure play facility with gardens, café
 - 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

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.
2. 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

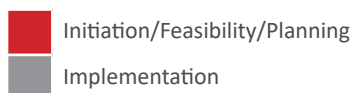
Business projects

- 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.

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