

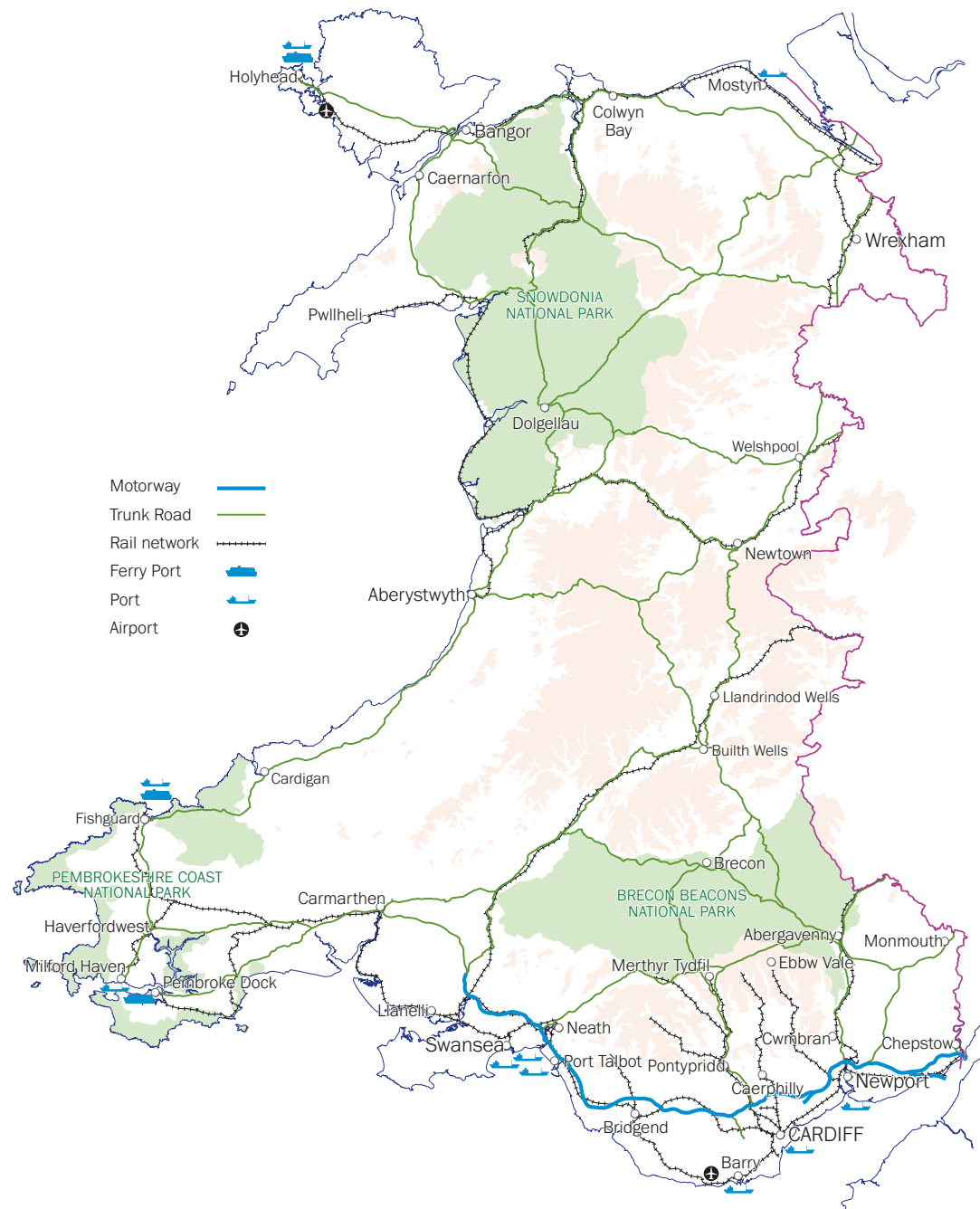
National Development Framework 2020-2040

Consultation Draft: 7 August – 1 November 2019



Llywodraeth Cymru
Welsh Government





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Foreword by Mark Drakeford

This National Development Framework sets out where we think we should try to grow and the types of development we need over the next twenty years to help us be a sustainable and prosperous society.

The Well-being of Future Generations Act means the Welsh Government and other public bodies must think about the long-term impacts of the decisions we make today, and this ethos is clear throughout the National Development Framework.

It is difficult to imagine how the world might look in 2040. We know there are significant challenges to meet, not least in tackling climate change. It is the globally defining challenge of our time and it is why we have declared a climate emergency. Tackling the causes and mitigating the effects of climate change is a key consideration in our plans and hopes for Wales.

The National Development Framework is another building block in making Wales a fair, green and prosperous place. It complements and builds on our national strategy, Prosperity for All, our Economic Action Plan and our plan for a Low Carbon Wales. The Well-being of Future Generations Act also commits us to the creation of a more equal Wales. We know from the UK2070 Commission that there are deep-rooted inequalities across the UK. The Commission concluded that in the UK “we are not taking full advantage of the economic potential that all parts of the UK have to offer”. The National Development Framework has combatting inequality at its core.

It covers a range of issues and challenges, including energy supply, transport, the natural environment, housing and industrial development. We can’t pretend that a long-term plan will eliminate all the tensions which are an inevitable part of policy making, but it will give us a basis for our decisions and help explain how decisions are reached. The National Development Framework is clear about what kind of place we want Wales to be by 2040 and that clear vision will be priceless as we take big decisions that affect the future of our country.

A great deal of collaboration from stakeholders and communities across Wales has gone into the preparation of this document and I am grateful for your continued support. The consultation on this draft National Development Framework is open until 1st November and I encourage you to get involved.

Mark Drakeford AM
First Minister of Wales

Foreword by Julie James

I am delighted to launch this consultation on the National Development Framework. It's an exciting responsibility to be putting forward the Welsh Government's twenty year spatial vision for development and I am confident it can support our ambition to make Wales a healthier, fairer and more prosperous place.

We know the next twenty years will see huge changes to the way we currently live our lives. We can expect the way we travel to be revolutionised with the growth of electric vehicles and the potential emergence of automated vehicles. The internet is already making us more flexible in where we can do our work and it is likely that the role and function of town centres has changed forever. We also know that climate change demands different attitudes about energy and a long-term mind-set in all our planning.

The challenge for a plan like the NDF is not necessarily to predict how Wales might change over the next twenty years, but to make sure we can build a society and an economy that is flexible and resilient, to enable all of us to benefit from the changes in a sustainable way. It means the NDF has a strong focus on sustainable travel, with policies on Metro systems and charging infrastructure for low emission vehicles. It sets a clear vision for more renewable energy, coupled with a commitment for more and better green infrastructure.

One of my personal priorities as a Minister is to ensure everyone has access to a good home. As a country we have not provided the homes that meet all our needs. Market led housing provision has failed to meet the needs of far too many people. I look forward to future housing development that includes far more houses to rent from local authorities and other registered social landlords. I want a planning system that consistently delivers the homes that meet all our needs and a system that makes it easier to live active and healthy lives.

I hope the policies in the NDF, complemented by the strong leadership set out in the new Planning Policy Wales, will help make this a reality.

A really important feature of this document is the regional policies. Across the Government we are committed to enabling bespoke approaches that suit the different parts of Wales to be developed. We are proposing the same regional footprint as the Economic Action Plan, so that local planning authorities and their stakeholders have a consistent basis for regional working and are encouraged to move ahead with developing Strategic Development Plans.

I firmly believe our plan-led system will work most efficiently and deliver the best results when we have a complete coverage of plans across three tiers – national, regional and local. We are close to a full suite of Local Development Plans in local authority and National Park areas, and we can look forward to having the National Development Framework in place next year.

This is the first version of the NDF. It has benefitted hugely from the involvement and contribution of stakeholders throughout its preparation. The Welsh Government will review and update the NDF every 5 years, but I am very keen that we use this first opportunity to set an ambitious path towards making sustainable places that work for everyone in our society.

I look forward to hearing what you think of it.

Julie James AM

Minister for Housing and Local Government

1 Introduction

Managing change and planning development that will last for generations is one of the most important responsibilities of government. This document is the Welsh Government's twenty year plan for shaping the future growth and development of our country.

What is the National Development Framework?

The National Development Framework (NDF) is a new development plan which will set the direction for development in Wales from 2020 to 2040. It sets a strategy for addressing key national priorities through the planning system, including sustaining and developing a vibrant economy, decarbonisation, developing resilient ecosystems and improving the health and well-being of our communities.

The NDF is a *spatial* plan, which means it sets a direction for where we should be investing in infrastructure and development for the greater good of Wales and its people. The NDF sets the challenge of delivering these improvements to public, private and third sectors. It makes clear the importance of *planning* new infrastructure and development in such a way they are complementary rather than competing priorities, ensuring opportunities are maximised and multiple benefits are achieved.

The Well-being of Future Generations (Wales) Act 2015 influences the way we plan for new development; it demands that development and use of land contribute to improving the economic, social, environmental and cultural well-being of Wales. Under the commitment to delivering sustainable development we will maximise our contribution to each of

the well-being goals. Choosing where to invest or considering whether a development is suitable in a certain place are difficult decisions where a balance often has to be found between competing priorities. We must strive to find solutions which maximise our contribution to the goals and well-being objectives. The NDF provides leadership and strategic direction for taking these decisions.

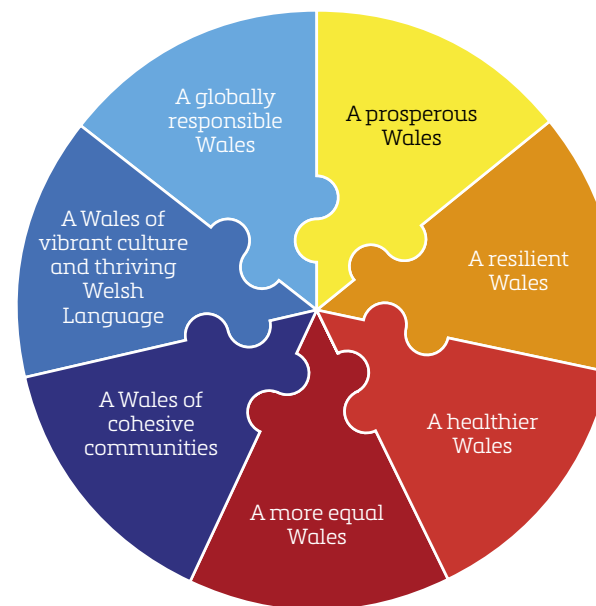
The NDF is the highest tier of **development plan** and is focused on issues and challenges at a national scale. Its strategic nature means it does not allocate development to all parts of Wales, nor does it include policies on all land uses. It is a framework which will be built on by Strategic Development Plans (SDPs) at a regional level and Local Development Plans (LDPs) at local authority level. These plans will identify the location of new infrastructure and development. SDPs and LDPs are required to be in conformity with the NDF and must be kept up to date to ensure they and the NDF work together effectively. Planning decisions at every level of the planning system in Wales must be taken in accordance with the development plan as a whole.



Well-being of Future Generations Act 2015 and the National Development Framework

The Act gives a legally-binding common purpose – the seven well-being goals – for national government, local government, local health boards and other specified public bodies. It details the ways in which these bodies must work, and work together, to improve the well-being of Wales. It is through the Act that Wales will make its contribution to the achievement of the 17 United Nations Sustainable Development Goals.

In developing the NDF, we have recognised our obligations under the Act. Embedding the principles of the Act, including the 5 ways of working (long-term thinking, prevention, collaboration, integration and involvement), within our strategic thinking and policy development has informed, influenced and shaped the NDF. We have carefully considered how the NDF reflects, aligns with and maximises its contribution to the well-being goals, objectives and ways of working.



Document Structure

The document follows a sequential structure, with each section building on the previous one.



The first chapter explains how the NDF fits within wider Welsh Government policy objectives and the purpose of the NDF. Key challenges and opportunities facing Wales over the next 20 years are highlighted in Chapter 2. It also introduces the three regions of Wales and provides a background to the economic, environmental, cultural and social conditions in each region:

North Wales | Mid and South West Wales | South East Wales

The challenges and opportunities inform the **NDF outcomes**, which taken together are a vision for change over the next 20 years. These outcomes, set out in Chapter 3, form the basis and the context for the remaining chapters.

A spatial strategy is presented in Chapter 4. The strategy focuses on the major patterns of development and areas of change on which the planning system at a national scale will focus to achieve the NDF outcomes. The spatial strategy is the overarching framework for deciding where to locate nationally significant developments, in order to maximise their contribution to the well-being goals. A strategic diagram shows the main components of the spatial strategy.

Chapter 4 also provides a policy framework for all-Wales issues of national importance, including renewable energy, affordable housing, mobile communications, ecological networks and charging infrastructure for electric vehicles.

Chapter 5 sets the Welsh Government's ambitions and policies for nationally important growth and development in the three **regions**. It highlights the key locations for development, identifies opportunities for developing infrastructure and sets a framework for regional and local planning.

How does the NDF fit with wider Welsh Government policy?

The NDF gives a spatial expression to Welsh Government policies of national importance. Policies and strategies on wide-ranging matters such as housing, transport, energy, natural resources and health have implications for all parts of Wales and can be supported if the planning system is aligned to deliver their aims. The NDF ensures the aims of the planning system across Wales are consistent with, and support the delivery of, Welsh Government policies.

The role and purpose of the NDF is defined by legislation and by the Programme for Government. The NDF is highlighted in *Prosperity for All: the national strategy* as holding an important role in driving sustainable growth and combating climate change by guiding strategic development over the next 20 years.

The NDF should be read alongside *Planning Policy Wales* (PPW) which provides planning policy on an all-Wales basis. The NDF complements PPW, with a shared commitment to placemaking and by setting out the spatial priorities for planning and development where national-level consideration is required. In combination, and supplemented by

Technical Advice Notes and procedural guidance, the NDF and PPW ensure the planning system across Wales is fully aligned in working towards national ambitions and well-being goals. The NDF does not repeat PPW nor cover all of the same policy areas. Together they set out how the planning system responds to and addresses national challenges and opportunities.

The NDF will be used to guide both public and private investment. Our aim is to ensure investments and developments – whether large or small in scale – contribute to the broader ambitions of the Welsh Government and to the well-being of communities. A broad range of Government strategies and policies have helped shape the NDF, including the Welsh National Marine Plan, the Transport Strategy and the Low Carbon Wales plan. The relationship is two-way with the NDF taking strategic direction and providing a means of delivery and a framework for maximising the potential outcomes.

We will lead the way with our own investments. The NDF will complement the Wales Infrastructure Investment Plan and Regional Economic Development Plans by enabling development that maximises the impacts of our investment. The scale of ambition for change outlined in the NDF reflects the ability of the public sector to deliver new development. The NDF spatial strategy will inform the Wales Infrastructure Investment Plan in determining our capital investment priorities, aligning the planned programme of infrastructure investments in Wales with the NDF's spatial approach.

The Welsh National Marine Plan is the first marine plan for Wales and represents the start of a process of shaping our seas to support economic, social, cultural and environmental objectives. Marine planning will guide the sustainable development of our marine area by setting out how proposals will be considered by decision-makers. The NDF and Marine Plan work together to provide a framework for the management of change around our coast. Co-ordination between marine and terrestrial planning is important to sustain and facilitate the development of port, harbour and marina businesses and associated enterprises; coastal communities; tourism opportunities; energy

generation; and seascapes. The emerging Welsh National Marine Plan has informed the preparation of the NDF and, where relevant, should inform Strategic and Local Development Plans and decisions made through the development management process.

The NDF replaces the Wales Spatial Plan.

The NDF and Habitats Regulation Assessment

Under Article 6 of the Habitats Directive (and Regulation 102 of the Habitats Regulations), an assessment is required where a plan or project is likely to have a significant effect upon a Natura 2000 (European designated) site. Specific mitigation measures have been recommended in the Habitats Regulations Assessment of the NDF to provide a strong guide to lower-tier plans and projects. It concludes that, on the assumption that these mitigation measures are adopted at the lower-tier planning or project scales, significant effects would be avoided. The Welsh Government therefore expects the findings of the Habitats Regulations Assessment of the NDF to be taken into consideration during their preparation and implementation of all development plans, including Strategic and Local Development Plans.

How does the NDF fit with Strategic and Local Development Plans?

There are three different tiers to the development plan in Wales – the NDF, Strategic Development Plans and Local Development Plans. The NDF is all Wales; Strategic Development Plans are prepared at a regional level covering more than one local planning authority area; Local Development Plans are prepared by each individual local planning authority.

Strategic and Local Development Plans must support the implementation of the NDF, and the strategic decisions they take must conform with the direction provided by the NDF.

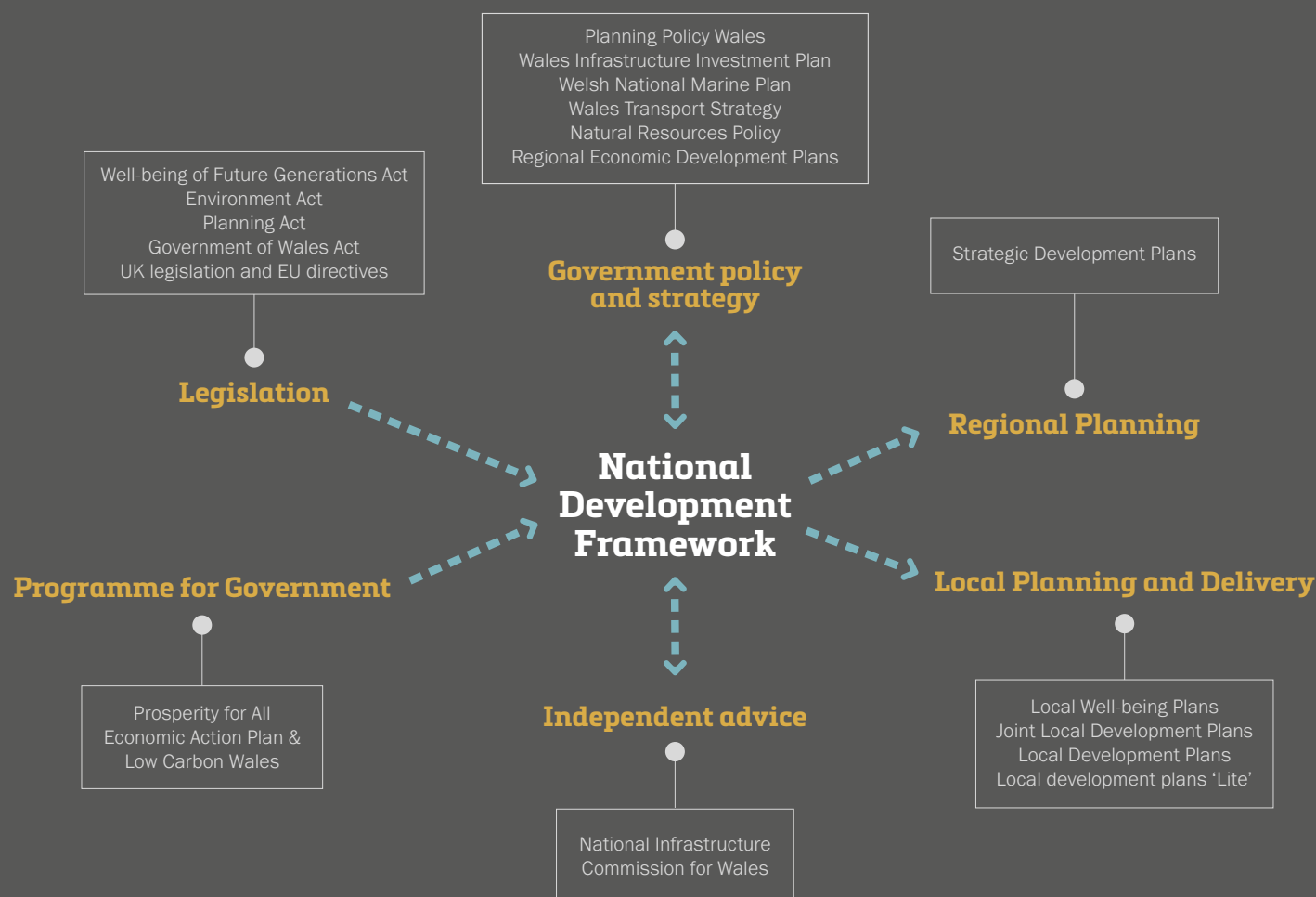
The role of each development plan is to plan and manage land use at its spatial scale. The NDF therefore considers issues at the national scale, Strategic Development Plans cover regional or sub-regional scales and

Local Development Plans consider issues at the local scale. All three tiers are important and it is the collective effect of all tiers working together that is the strength of the planning system in Wales.

The NDF and its spatial strategy has been prepared in the context of the three tiered development planning system. The NDF does not seek to take decisions that are most appropriately taken at the regional or local level. It provides direction and in the case of Strategic

Development Plans, sets out the policies and key issues the Welsh Government requires the regions to take forward. It does not seek to identify the exact location for new development, the scale of growth in individual settlements or prescribe precise boundaries of areas where development should not take place. The regional and local tiers are the most appropriate level at which to take these decisions, involving communities as they do so.

Model of NDF Influence



2 Wales: An Overview – Challenges and Opportunities

Wales is a nation with a long and proud history and a rich social and cultural heritage. We face challenges and opportunities and are committed to protecting the well-being of our future generations.

Changing population

We are a nation of over 3 million people, whose population has grown by 8% between 1997 and 2007 and are projected to rise by a further 4% between 2018 and 2038. We are an ageing nation, reflecting wider UK and European trends, and will have a third more people aged 65 and over by 2038. We are living longer but life expectancy is below the UK as a whole. Communities are spread across Wales from the populated northern and southern areas to sparsely populated mid Wales.

A living, thriving Welsh language

Welsh is a living language, with over 562,000 speakers across all parts of the nation. Our ambition for the Welsh language is to reach a million Welsh speakers, as well as increase the percentage of people who speak Welsh daily by 10% by 2050. Communities in the Welsh speaking heartlands in the north-west and west of Wales continue to live everyday life through a language spoken in our nation for 1,500 years.

Natural resources

Natural resources and resilient biodiversity and ecosystems support our well-being and prosperity; they have shaped our past and will shape

our future. Welsh coal, steel and iron drove the industrial revolution, and our wind, solar and tidal resources point forward to a clean, sustainable future. We depend on high quality natural resources to fuel our industries, provide our food, clean air and water and create jobs and wealth. We are committed to living within our means, using only our share of the planet's resources and using them efficiently.

A living landscape

Our landscapes are amongst the best in the world and tell the story of our nation from volcanoes, glaciers, mountains and river valleys to castles, farms, industrial heritage and ports. A quarter of our country is covered by our three national parks and five areas of outstanding natural beauty. We have a number of World Heritage Sites and nature conservation areas, and our coast on three sides connects communities and people to the sea.

Industrial legacy

Our economy changed profoundly in the late 20th Century and will change again through the 21st. Wales' main population centres in south and north Wales were strongly tied to the traditional heavy industries they grew up around, and as these industries declined, so too did the local economies and the communities that relied upon



them. On average, economic activity, wages and productivity in Wales are lower than the UK average. Gross Value Added (GVA) per head in Wales in 2017 was £19,900 compared to the UK average of £27,300.

A changing economy

Our economy now is more service-based and there is an increasing focus on technology and the digital sector. Over the last 10 years the fastest growing parts of our economy in terms of employment have been in the information and communication sectors. Small and medium sized enterprises are an important part of our economy and grew more in Wales in 2018 than within the UK as a whole. Research and innovation are recognised as twin drivers for competitive economic advantage and driving productivity. The importance of developing an innovative and knowledge based society, built upon research and innovation, is an integral factor for driving our global competitiveness and supports our sustainable economic and social improvement ambitions.

Our visitors

We attract visitors from all over the world, with 10% of our overnight visitors coming from outside the UK. There were 96 million tourist day visits in 2018, 10 million overnight stays and around £6.3 billion generated from tourism for the Welsh economy.

A connected nation

We are an increasingly connected nation. 93% of homes and businesses have access to a superfast fixed broadband speed, though only 38% of homes in Wales use the service. The next stage is to develop access to ultrafast fixed broadband speeds. In 2018, ultrafast coverage rose by almost 20 percentage points, to cover 29% of Welsh homes and businesses. This figure remains behind the UK average, which is a consequence of our dispersed settlements and distinctive topography, and increasing coverage is a key goal.

Our place in the world

We live alongside our neighbours, with close ties across the border in north, mid and south Wales. There are almost 8 million people living within 50 miles of the Wales-England border. More than a fifth of our population was born in England. People travel daily in both directions to work, to shop, to socialise and access services and institutions. We visit and trade with Ireland, Europe and beyond and our ports, roads and rail lines are key connections into wider European networks. We are well connected to Europe but peripheral in a wider geographic context and will strive to maintain and enhance these connections.

Diverse regions

The **North Wales** region comprises Conwy, Denbighshire, Flintshire, Gwynedd, the Isle of Anglesey and Wrexham and is home to almost 700,000 people, of whom over 200,000 speak Welsh. Its dramatic landscape includes low lying coastal plains, mountain ranges and industrialised former coal fields. The population is concentrated in an arc along the coast from the Menai Straits to the border with England. The main concentration of population is in the east around Wrexham-Deeside.

The **Mid and South West Wales** region comprises Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys and Swansea and has a population of over 900,000 people, of whom over 200,000 speak Welsh. This large and diverse region includes some of the most rural and sparsely populated parts of the UK, and the urban, industrialised areas around Wales' second city, Swansea. The region has a renowned coastal environment and it includes two of Wales, three national parks.

The **South East Wales** region is geographically the smallest. It comprises Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan and is the most populous region of Wales, with over 1.5 million residents, of whom over 150,000 speak Welsh. The region includes the coastal cities of Cardiff and Newport and the former industrial heartlands of the South Wales Valleys.

Challenges & Opportunities

We face a number of challenges and opportunities and these have shaped our first NDF.

Climate change and the decline in biodiversity are global challenges and the biggest issues faced by our nation. Addressing these is our greatest responsibility when considering the legacy we will leave for future generations and as a consequence we have declared a Climate Emergency. In response to the challenge, we are committed to decarbonising Wales and to delivering healthy, resilient ecosystems. The NDF, together with Planning Policy Wales, will ensure the planning system nationally, regionally and locally focusses on delivering a decarbonised and resilient Wales through the places we create, the energy we generate and use, a circular economy, the houses we live in and the way we travel.

Wales can become a world leader in renewable energy technologies. Our wind and tidal resources, our potential for solar generation, our support for both large and community scaled projects and our commitment to ensuring the planning system provides a strong lead for renewable energy development mean we are well placed to support the renewable sector, attract new investment and reduce carbon emissions.

Wales has a rich variety of nature conservation sites, protecting a diverse range of important and unique habitats and protected species. **Ecosystems** underpin our well-being, health, economy, culture and identity. We depend on them to provide us with food, raw materials and clean water, and to regulate our climate and air quality. Many of our key industries such as agriculture, forestry, fisheries, energy, water and tourism rely on healthy, functioning ecosystems to prosper and to support communities across Wales. Ensuring the resilience of our ecosystems provides an opportunity to promote green growth and innovation to create sustainable jobs, sustain a more resource efficient economy and maintain healthy, active, sustainable and connected communities.

As our climate changes, pressure on **water resources** is predicted to increase. The supply and management of water will be of increasing importance. Currently, Wales can meet its water needs and we are able to transport water from source to areas of demand. The location of future growth provides an opportunity to consider where we will need water and how we safeguard our resources in the future. Focussing development in existing built-up areas reduces the likelihood of a need for significant new sources of water, but we must recognise the potential impact of climate change on the supply and availability of water.

The management of our **coasts** is important for all regions in Wales. The built-up coastal areas are where the majority of people live. In coastal areas Shoreline Management Plans identify opportunities to build ecosystems resilience and inform spatial choices in relation to development, taking into account erosion and current and future flood risks.

Travel across Wales is shaped by our topography and the distance between the main built-up areas in the north and south. Connections between North Wales and South Wales are fragmented and it is not possible to travel by train without leaving the country. East-West connections are better, but the road and rail networks can be congested. Significant investment in public transport, including Metro schemes and active travel infrastructure, including the walking and cycling routes being developed as a result of the Active Travel Act, provide an opportunity to re-think how our places work. Growth should be shaped around sustainable forms of transport and deliver places that make us and the environment healthier. The National Cycle Network is an important part of our national infrastructure and its planned improvements are supported.

Aggregates underpin economic growth, providing construction related products essential for the delivery of placemaking, housing and infrastructure. When construction leads to a spike in demand, caused for instance by major infrastructure projects, pressures are placed on



the minerals industry to provide the necessary materials. Effective planning ensures a good stock of permitted reserves is available to supplement existing productive capacity at any given time. A reliable supply of minerals, capable of meeting demand in all regions of Wales simultaneously, is vitally important.

The pace of change in **technology** is a challenge and opportunity for all nations. The jobs that future generations will do may not have been invented yet. Automation and Artificial Intelligence technologies will impact on all occupations. Advancements in technologies like electric vehicles, coupled with mobile applications which provide bespoke transport services, have the potential to re-shape the way we travel, the vehicles we own, public transport and the places we will live in. Work patterns have the potential for change too, becoming more flexible in terms of location and hours. The NDF and Planning Policy Wales support the provision of the infrastructure required to support new technologies and to ensure the places we create in the future can support our changing society.

The NDF has been prepared at a time when the UK is changing its relationship with Europe. Since 2016 **Brexit** has been central to public debate and has given rise to profound uncertainty on our future relationship with Europe and a wide-range of well established policy frameworks, which impact all aspects of our lives. As a nation, we are especially vulnerable to the impacts of Brexit. Both agricultural funding and regeneration programmes are areas of major public policy which have been shaped by wider European policies and funding. In response the NDF seeks to provide a positive, proactive framework to give certainty and direction on where Wales will grow and where we will invest. It also provides a framework responsive to changing circumstances to ensure that we are able to take decisions on future policy issues that are still to be defined.

Prosperity and reducing inequality remain the priorities Welsh Government policies. Prosperity is not equal across all parts of Wales, and West Wales and the Valleys continues to be recognised within Europe as one of the less developed regions. Health varies across Wales, with our poorest communities experiencing pronounced differences in health outcomes. The NDF provides a framework for regional planning to tackle regional inequalities and ensure that the most prosperous parts of Wales play a role in supporting their wider regions. It will ensure we take action to meet the needs of those struggling to access housing and that the places we create make us happier and healthier.

Good quality **affordable homes** are the bedrock of communities and form the basis for individuals and families to flourish in all aspects of their lives. The NDF provides evidence of the need for housing across Wales at both a national and regional level. In particular, this evidence demonstrates the need for a focus on increasing the delivery of affordable homes. The Welsh Government is targeting its housing and planning interventions towards achieving this aim within the broader context of increasing supply and responding to different needs.

Our society is **ageing** and we need to think about the type of houses in which we will live in the future; where they are; the social and healthcare services that will support us; and the type of places that we as an ageing population would like to live in. It is also a reminder that we need to retain and attract young people and promote active lifestyles. The NDF, together with Planning Policy Wales, places a strong focus on the places we create through our planning system. Building new houses or infrastructure is not an end itself; we are determined to create places that support our well-being across the whole of our lives.

The NDF will help us prepare for the future. The NDF Outcomes set out the Wales we wish to pass on to future generations.

3 NDF Outcomes

Identifying what we want to achieve is an important step in preparing a strategy for a development plan. The NDF Outcomes are overarching ambitions based on the national planning principles and national sustainable placemaking outcomes set out in Planning Policy Wales. The 11 outcomes are collectively a statement of where we want to be in 20 years time. Every part of the NDF, from the spatial strategy to regional policies, is concerned with achieving the NDF Outcomes. Most policy areas will contribute to multiple outcomes.

Through the NDF, we will develop:

A Wales where people live....

1. and work in connected, inclusive and healthy places
2. in vibrant rural places with access to homes, jobs and services
3. in distinctive regions that tackle health and socio-economic inequality through sustainable growth
4. in places with a thriving Welsh Language
5. and work in towns and cities which are a focus and springboard for sustainable growth
6. in places where prosperity, innovation and culture are promoted
7. in places where travel is sustainable
8. in places with world-class digital infrastructure
9. in places that sustainably manage their natural resources and reduce pollution
10. in places with biodiverse, resilient and connected ecosystems
11. in places which are decarbonised.

The 11 Outcomes can be achieved over the next 20 years if the planning system – through the NDF and other development plans – is focussed on the long-term and provides quality development in the right places for the right reasons. These Outcomes are inter-related and inter-dependent, and will improve places and well-being across Wales.



Outcome

1

Our cities, towns and villages will be physically and digitally well connected, offering good quality of life to their residents. High-quality homes meeting the needs of society will be well-located in relation to jobs, services and accessible green and open spaces. Places will meet and suit the needs of a diverse population, with accessible community facilities and services.

2

In rural areas, job opportunities and community services will be supported to help attract and retain people. A balance will be found between development and preserving the character of rural Wales, ensuring our small towns and villages have bright futures as attractive places to live and work. There will be support for the agricultural sector and its supply chains to boost resilience through diversification.

3

The regional approach will recognise that different parts of Wales work differently to each other, with distinct underlying characteristics and challenges. The three regions will address inequalities by building stronger links between public services, communities and business. Each region will be encouraged to build on their existing strengths and pursue opportunities to achieve greater prosperity and well-being.

4

We aim to have a million Welsh speakers in Wales by 2050 – an increase of almost 80% on current levels. Where Welsh is the everyday language of the community, development will be managed to ensure there are jobs and homes to enable the language to remain central to those communities’ identities. Elsewhere education authorities will lead in developing infrastructure to enable the language to develop as a natural, thriving part of communities.

5

Cities and large towns are magnets for jobs and investment, while people are drawn to live and work there for the economic and social opportunities they provide. Development plans will enable and support aspirations for large towns and cities to grow, founded on sustainability and urban design principles, active travel and investment in key built and green infrastructure to enable population and economic growth whilst reducing pollution. Areas outside the urban centres will benefit directly from the strength of our large towns and cities, through improved connectivity and additional investment in new homes, jobs and services.

6

Development Plans will have a forward thinking, positive attitude towards enabling economic development, investment and innovation. Increased prosperity and productivity will be pursued across all parts of Wales, building on current activity and promoting a culture of innovation, social partnership, entrepreneurialism and skills-development in sustainable industries and sectors. The culture, heritage and environment of Wales will play a positive, modern role in the economy by attracting the interest and expenditure of tourists, and providing a distinctive and trusted brand for Welsh businesses.

7

All methods of travel will need to have low environmental impact and low emissions, with ultra low emission vehicles and public transport replacing today's petrol and diesel vehicles. Active travel and public transport will be a significant part of the transport mix, allied with a reduced reliance on private vehicle use, with sustainable transport infrastructure embedded within new developments to enable easy and convenient access from one place to another for commuting, business, tourism and leisure purposes.

8

Broadband provision will develop and evolve, beginning with comprehensive coverage of superfast and progressing to ultra-fast fibre, which will help businesses to be more productive, resilient and innovative. Better digital communication will enable changes to the economy and way of life, and ensure Wales can lead and keep pace with the latest global technological advancements.

9

Wales' natural resources, including its minerals, coast, water, forests and landscape, support a range of activities and sectors and are assets of great value in their own right. The environmental, social and cultural value of our resources will be managed, maintained and enhanced, while economic benefits will be utilised sustainably and appropriately by promoting nature-based solutions and a circular economy. Across Wales better resource choices will be reflected in more sustainable places, which benefit from reductions in levels of pollution, and be healthier and more liveable.

10

The variety of flora and fauna found across Wales make Wales a special place. Biodiversity underpins the functioning of healthy resilient ecosystems and the multiple benefits they provide. While biodiversity has declined in recent decades, we will reverse these losses and enhance the resilience of ecosystems. The planning system will ensure wildlife is able to thrive in healthy, diverse habitats, both in urban and rural areas, recognising and valuing the multiple benefits to people and nature.

11

The challenges of climate change demand urgent action on carbon emissions and the planning system must help Wales lead the way in promoting and delivering a competitive, sustainable decarbonised society. Decarbonisation and renewable energy commitments and targets will be treated as opportunities to build a more resilient and equitable low-carbon economy, develop clean and efficient transport infrastructure, improve public health and generate skilled jobs in new sectors.

4 Strategic and Spatial Choices: the NDF Spatial Strategy

A spatial strategy sets a structure for the type and location of development across the plan area. It highlights the key settlements in which development will be focussed and the infrastructure, transport, actions and resources required to support the strategy.

The NDF spatial strategy is a guiding framework for where large scale change and nationally important developments will be focused over the next 20 years. The strategy blends the existing settlement patterns and the distribution of jobs and homes with a vision of managing change and future trends for the benefit of everyone in Wales.

The spatial strategy supports the NDF Outcomes. Decisions taken at a national level, including Welsh Government investment choices, will reflect the principles of the strategy and make positive contributions towards the national placemaking objectives.

Our strategy is to build on existing strengths and to consolidate advantages. It encourages sustainable and efficient patterns of development, based on co-locating homes with jobs and vital services and the efficient use of resources. It contributes to achieving decarbonisation and biodiversity objectives and supports national ambitions for improving health. It enables the creation of thriving, sustainable communities and is aligned with the Welsh Government's broader goal of encouraging a million people to speak the Welsh language by 2050.

Co-locating homes, jobs and services means focusing on cities and large towns as the main development areas. Developing our urban areas to enhance their performance will be challenging,

but we firmly believe it is the right ambition for Wales and supports the Welsh Government's commitment to social justice. Choosing to develop new towns and enabling sprawling greenfield development would be to ignore the untapped potential of places which already have town centres, universities and colleges, public transport infrastructure and a good range of public services. It would also squander key assets in the form of productive countryside and natural resources.

The focus on growing urban areas will create concentrations of jobs, services and amenities and a critical mass of people to sustain good public transport services and a range of economic activities. An urban growth focus enables more people to walk and cycle for everyday journeys and, with good urban design, can create positive impacts on public health, air quality and well-being.

Sustainable growth will involve setting an ambitious strategy for achieving biodiversity and green infrastructure enhancement in our urban areas. Effective and innovative nature-based solutions to the challenges of urban form, design and density will be required in order to reap the well-being rewards of living and working in exemplar, future-resilient settlements.

In all parts of Wales, the strategy supports sustainable growth. Any place without jobs, homes, community spaces and wildlife has no prospect of having a thriving and cohesive community, Welsh language or economy. There is such a thing as too much development or the wrong type of development, whereas sustainable development should foster a stable or growing population to ensure a healthy natural environment and economic and social stability.



Growth and new development must be in the right place, undertaken in the right way and make efficient use of our resources to achieve the NDF Outcomes. The spatial strategy has three components and sets out:

- where in Wales growth should be focused;
- how growth should be planned and managed
- how we should power and heat places using renewable energy and district heat networks.

Spatial Strategy: Where Wales will grow

Population trends in Wales have historically reflected economic fortunes, with people drawn to the areas where jobs were available. Over two centuries this has resulted in the development of three main urban clusters of cities and towns:

- Cardiff, Newport and the Valleys;
- Swansea Bay and Llanelli; and
- Wrexham and Deeside.

Each of these urban areas is economically distinctive, supporting a range of businesses, enterprises and universities, and offering culturally rich lifestyles to residents and visitors. They are nationally significant places and this strategy promotes their continued growth and regeneration. As a result, new large-scale employment opportunities and housing growth will occur predominantly, though not exclusively, in these urban areas.

Outside of these areas are a mix of smaller towns and villages and large areas of countryside. Many towns are traditionally market towns and have retained the function of being gathering places for people living and working in rural places. Along the coast our maritime and resort towns remain popular places in which to live and visit, though there is a need for regeneration in some places. Development in towns and villages in rural areas will support local aspirations and need, complementing rather than competing with efforts to grow our cities and towns.

The NDF identifies a range of important regional centres which, through specific policies in Strategic and Local Development Plans, should retain and enhance the commercial and public service base that make them focal points in their areas. This will apply in places like Carmarthen, the Pembrokeshire Haven towns, Aberystwyth, Llandrindod Wells, Newtown, Caernarfon, Bangor and the coastal towns from Llandudno to Prestatyn.

By focussing large scale growth on the urban areas, development pressures can be channelled away from the countryside and productive agricultural land can be protected. Rural areas have an important function as providers of food, energy and mineral resources. Communities in rural areas are strongly supported; the aim is to secure sustainable economic and housing growth which is focussed on retaining and attracting working age population and maintaining and improving access to services. In areas designated for their landscape or ecological importance, protection against inappropriate development remains in place.

The spatial strategy empowers local policy and decision-makers to develop the national priorities through Strategic and Local Development Plans and identify areas and issues of significance to their particular areas.

Spatial Strategy

National Growth Areas



Regional Growth Areas



Regional Connectivity



Intra-urban Connectivity



International Connections



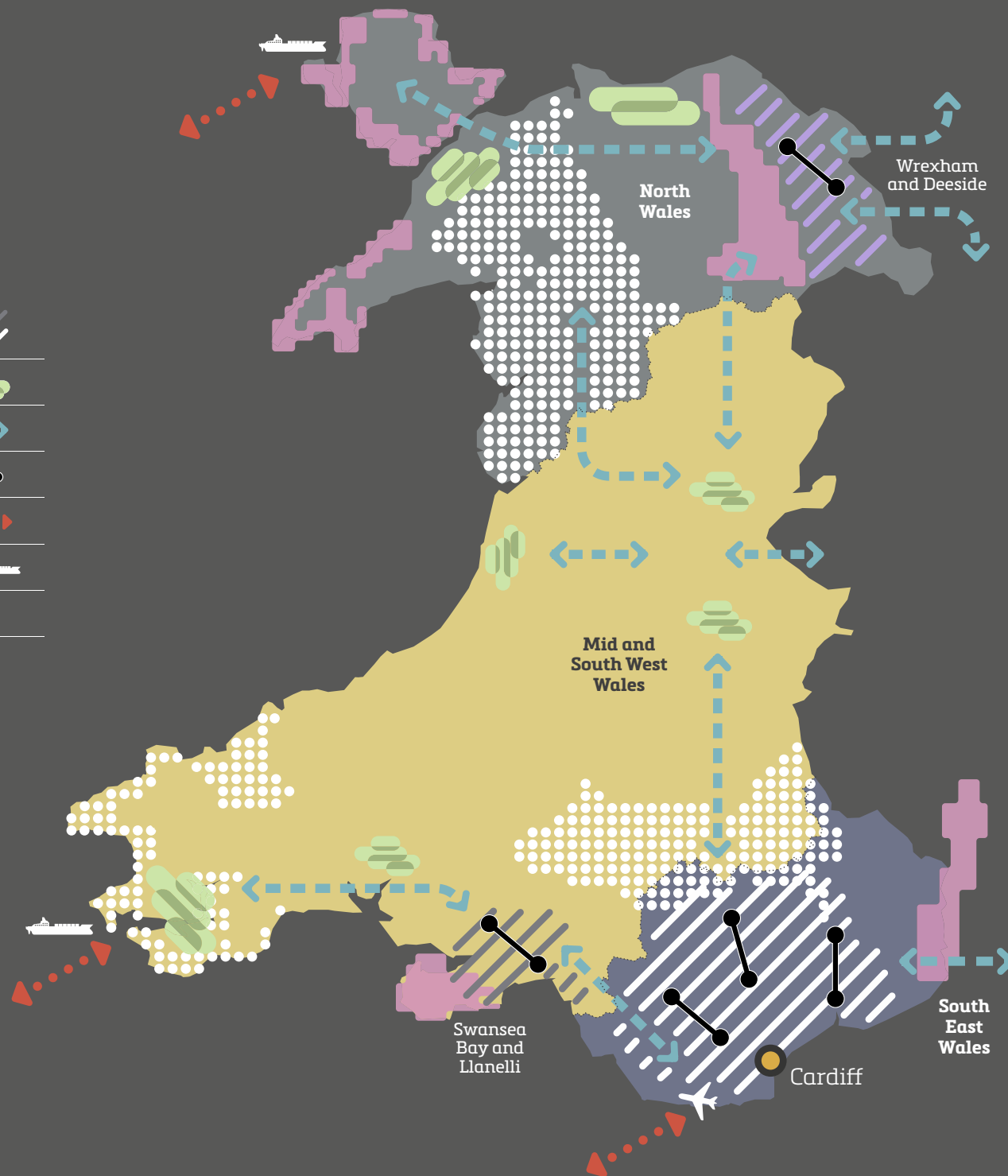
Strategic Port / Airport



National Parks



Areas of Outstanding Natural Beauty (AONBs)



Policy 1 – Sustainable Urban Growth ^{P1}

Urban growth should support towns and cities that are compact and orientated around urban centres and integrated public transport and active travel networks. Higher density and mixed use development on sites with good access to urban centres and public transport hubs, including new and improved Metro stations, will be promoted and supported.

Spatial Strategy: Planning and managing growth

We want places to be healthy, prosperous, vibrant and cohesive, and to support well-being. How we shape places will determine how we respond to climate challenges and make use of our resources. It is important that places are well planned and have strategies for ensuring our needs and demands are met and managed in a sustainable way. Sustainably planned places reduce the need to travel by car; encourage walking, cycling and public transport; embed green infrastructure; and take action to ensure air is clean. They ensure homes and businesses are connected to essential services such as energy, water and broadband and provide different spaces for all our daily activities.

Planning is fundamental to achieving liveable, successful places. We set out in the preceding section those parts of Wales which will accommodate strategic growth. This section, which applies to all parts of Wales, sets out how this growth should be planned and managed to create sustainable places.

Supporting our urban areas

- ^{P1} The growth aspirations of the NDF are an opportunity to shape and grow, renew and regenerate our cities and towns and create sustainable, healthy places which embed green infrastructure. The Welsh Government wants towns and cities that are compact and organised around urban centres and public transport hubs.

Density is a key factor in shaping how places grow and function. Higher density development makes efficient use of land, requires less land to be developed and protects rural areas from loss of countryside. Higher densities provide the necessary intensity of people and activity to animate streets and public spaces, support high streets and sustain good public transport services.

Successful, healthy towns and cities have a rich mix of residential, commercial and community uses within close proximity to each other. This creates activity throughout the day and enables people to walk and cycle to school, work or the shops, rather than being reliant on travelling by car.

The density and mix of uses of development should reflect the site and area's wider context, particularly the proximity to an urban centre and the public transport accessibility. This variety will result in different areas having different characteristics, including some lively and busy areas and some quieter and more secluded areas, which will result in places that cater for varied lifestyles. However, low density and mono-functional development in areas with the potential for greater densities and a mix of uses, misses the opportunity to allow more people to live closer to transport hubs, jobs, services and cultural destinations and fails to create more sustainable places.

The Welsh Government promotes Transit Orientated Development, which involves the above mentioned principles of compact, higher density, mixed use development around transport corridors and stations. The Metro projects, which

Policy 2 – Supporting Urban Centres P2

Proposals for new public service facilities of a significant scale should be located in town and city centres. A sequential approach must be used to assess development plan allocations and to determine planning applications for developments. Only in exceptional circumstances should public service facilities of a significant scale be approved outside of town and city centres.

are at different stages of progress, all offer significant and timely opportunities to identify locations for Transit Orientated Developments around new and existing stations. Land in close proximity and with good access to Metro stations is an important and finite resource and will play a key role in delivering sustainable urban places.

Good planning and a commitment to excellence in urban design are required to successfully accommodate higher density developments. High density does not necessarily mean high rise and it should not be achieved by squeezing standard design houses closer together or by reducing internal living space. Urban solutions to the layout and design of development, including compact forms of development, are capable of integrating higher densities in a way that creates vibrant places, with a high quality public realm and a good quality of life. Incorporating green infrastructure, in particular, will require innovative design solutions to deliver wider well-being benefits.

These principles are applicable to towns and cities with good public transport links throughout Wales. They are scalable, with the definition of higher density and mixed use development varying in different places. Further guidance will be produced to support the implementation of the policy in different parts of Wales.

P2 The principle of ‘town centres first’ is well established in planning policy in relation to retail developments. However, good planning can help us re-think the future of town and city centres, which are moving away from their traditional retail roles. They remain

important focal points of communities and are increasingly becoming places to live and work, centres of community and cultural activity, and the focus for public services such as health and education.

Public service facilities include hospitals, primary healthcare facilities, libraries, universities and colleges and any public sector organisation building which attracts significant numbers of workers and visitors. Local planning authorities, both urban and rural, should be confident in defining what constitutes development of ‘a significant scale’ for their area. Appropriate definitions can be produced through an understanding of the type and scale of development an area can expect, the quality of the public transport services they will rely upon and with local consultation.

Public investment and land

Investment by the public sector and the decisions it takes regarding its land can make a major contribution to shaping places. The Welsh Government and the wider public sector must lead the way in shaping sustainable places. Public services and facilities are central to our lives and support society best when they are accessible to all.

Major public buildings and facilities serve large populations, often well beyond the boundaries of the settlement. These include general hospitals, large government buildings, council offices, transport hubs, colleges and universities. Smaller developments which serve part of a city or town, including

Policy 3 – Public Investment, Public Buildings and Publicly Owned Land ^{P3}

Welsh Government investments and land holdings will support the delivery of sustainable places. We will work with all public land owners and investors to ensure that new development of a significant scale is located in town and city centres which are accessible by walking, cycling and public transport.

Strategic and Local Development Plans should review publicly owned land, both redundant and in current use, to identify potential sites for development and re-development, including for mixed use and affordable housing developments that will support the creation of sustainable places.

schools and GP surgeries, may be more appropriate in accessible locations within neighbourhoods, particularly in or adjacent to local centres, where they can better meet the needs of communities.

^{P3} Policy P3 applies to major trip-generating developments, such as public service facilities, sport stadia, cultural venues and exhibition spaces which have the potential to drive regeneration and often rely on public funding.

The Well-being of Future Generations Act means all public sector bodies in Wales have a duty to deliver the well-being goals. This will require consideration of the wider implications of decisions in relation to the sale, re-use and development of publicly owned land.

In assessing the cost or value of the potential development of publicly owned land, either by the public sector or following a sale to a private or third sector interest, all potential costs should be considered. These include costs to the environment, climate change targets and wider society. A development in an unsustainable location that results in increased car trips, that is poorly served by public transport, that is inaccessible to the least mobile or poorest members of society, that fails to make a contribution to supporting vibrant town and city centres will have negative impacts on both current and future generations. A short term capital receipt or a cheaper development cost is unlikely to offset these longer term costs.

The Welsh Government, UK Government departments, local authorities and other public landowners should undertake strategic reviews of their land holdings in Wales and consider the NDF Outcomes and spatial strategy. Where publicly owned land could support sustainable places, positive consideration should be given to the future use of this land and whether it could, for example, support new mixed use development, including affordable housing and new commercial activities, or transport infrastructure.

Supporting our rural areas

Large parts of Wales are rural in character. Rural areas are sparsely populated, with 40% of the population living in settlements of less than 10,000 people in Wales, and they are integral to the health and livelihood of our nation. Like our urban centres, rural areas are diverse, with both prosperous and deprived communities, innovative businesses, essential resources and distinctive histories and cultures. They draw visitors to Wales from around the world and they play a major role in meeting our water, food and energy needs. They also include places where Welsh is the main language of the community.

It is important the challenges faced by the rural economy, in particular the agricultural sector, are at the fore when considering the future of rural areas and that the planning system responds to these challenges, facilitating appropriate new development and diversification.

Policy 4 – Supporting Rural Communities P4

The Welsh Government supports sustainable rural communities and appropriate proportionate growth in rural towns and villages.

The future for rural areas are best planned at the regional and local level. Strategic and Local Development Plans should plan positively to meet the needs of rural communities with regard to housing, transport, businesses, services and diversification in the agricultural sector.

Strategic and Local Development Plans should ensure people living in rural areas have access to jobs, services and social infrastructure of appropriate scale. They should support strong and resilient rural areas, with a positive framework for economic development, diversification and meeting local housing needs. Strategic spatial decisions must ensure the needs of the dispersed rural population are met.

P4 Rural towns are integral to their surrounding areas and should be supported. It is important that rural communities have appropriate access to wider job and economic markets, and decisions on regional economic development and transport infrastructure and services should consider the needs of all parts of Wales. It is also important that rural communities are able to develop stronger economies and support enterprise. Strong rural economies support strong and resilient communities, can reduce the need to travel, and reduce the reliance on a small number of larger economic centres. Priority should be given to economic activities with strong links to rural areas, including food and drink processing, energy generation, tourism and leisure, the environmental economy and businesses ancillary to farming, forestry and other rural economic activities. The improved provision of broadband in rural Wales supports an increasingly diverse business base.

The Welsh Government wants rural areas to sustain themselves and meet the needs of those living there and it also wants the Strategic and Local Development Plans prepared in rural areas to develop strong, ambitious policies that support rural areas. Where these plans identify growth in rural settlements, this will be supported where it is appropriate, proportionate to the needs of the settlement and the wider rural area they serve and where it has been planned through the evidence based, consultative development plan process.

In the preparation of development plans and in determining proposals through the Development Management process, decision makers should be confident in identifying which areas constitute 'rural' in the context of this policy. A rural location within proximity of the major urban areas experiences a different set of issues in terms of access to housing, employment, essential health, education and transport services than a rural location in central mid Wales and it may not be appropriate for rural focussed policy to be applied to both types of location equally. Through an understanding of the issues and geography of an area and through the preparation of development plans, appropriate definitions can be prepared.

The policies in this section on supporting urban centres, delivering affordable homes, supporting communities through the use of publicly owned land, mobile action zones and the provision of electric vehicle charging infrastructure all apply to Wales' rural areas. They should be considered as priority issues for the preparation of Strategic and Local Development Plans across the whole of Wales.

Delivering Affordable Homes

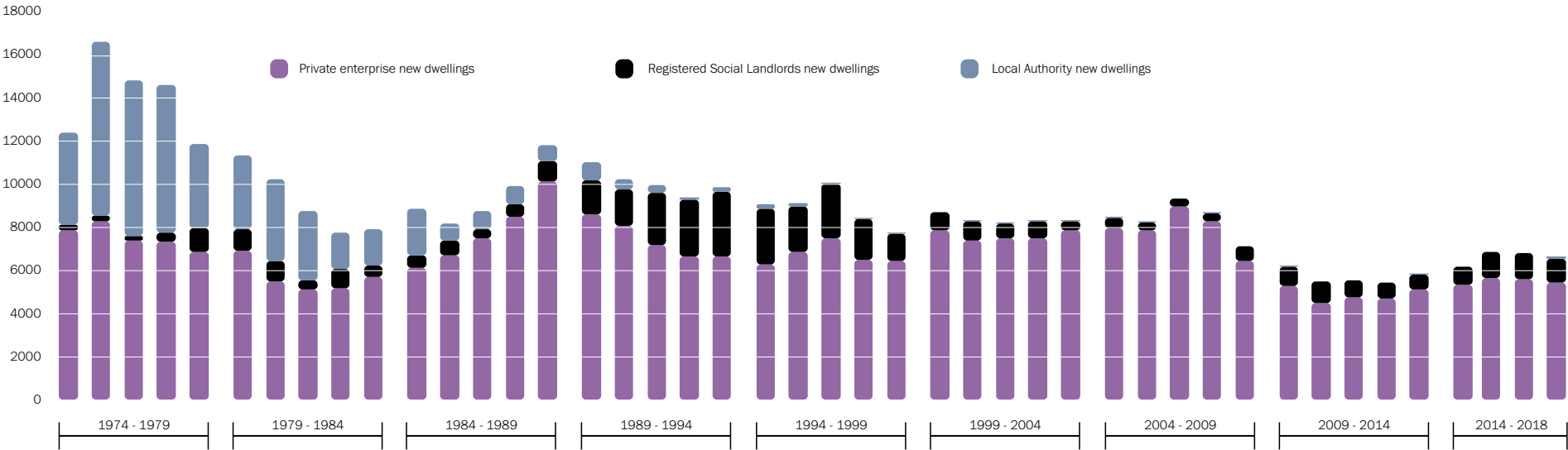
Providing housing in Wales at levels which meet our needs is a priority. There is a complex picture of provision and the opportunities people have vary significantly depending on income and where they live in Wales.

The Welsh Government has published a range of ‘Estimates of housing need in wales’ based on different demographic scenarios. The central estimate suggests a need for an additional 114,000 homes across Wales up to 2038. During the initial five years (2018/19 to 2022/23) it is estimated that on average 8,300 additional homes will be required annually, with more than half (57%) of these homes needed in South East Wales, almost a quarter (24%) in Mid and South West Wales and 19% in North Wales.

These estimates also indicate that the provision of affordable homes should become a key focus for housing delivery. It is estimated under the central estimate that on average 47% of additional homes should be affordable housing (social housing or intermediate rent) throughout 2018/19 to 2022/23, with the remaining 53% being market housing. This represents an average of approximately 3,900 affordable homes and 4,400 market homes per year over the five year period.

The scale of the housing challenge is illustrated in the Chart below, which demonstrates that delivery of new homes over the last ten years has not reached the level of additional homes that it is now estimated are required over the next five years.

Housing completions 1974-2018: Wales



Source: Information on new dwelling completions by financial year by tenure in Wales are based on the reports of local authority building inspectors and the National House Building Council (NHBC). It is sometimes difficult for building control officers who record the data to identify the intended final tenure of the property (the basis for the tenure information). This may lead to an under-count of social sector new house building and an over-count for the private sector. Therefore the tenure breakdown should be treated with caution.

Policy 5 – Delivering Affordable Homes P5

The Welsh Government will increase delivery of affordable homes by ensuring that funding for affordable homes is effectively allocated and utilised.

Strategic and Local Development Plans should develop strong evidence based policy frameworks to deliver affordable housing, including setting development plan targets based on regional estimates of housing need and local assessments. In response to local and regional needs, they should identify sites for affordable housing led developments and explore all opportunities to increase the supply of affordable housing.

To address both the ‘delivery gap’ and housing need in Wales, a shift in the delivery model is required by building affordable homes at scale and pace. The gap has widened since greater reliance has been placed on the private sector to meet this basic human need. To address this we will support a more balanced approach with local authorities, registered social landlords and Small and Medium sized construction and building enterprises encouraged to build more homes. The reuse of publicly owned land will be important to the delivery of these homes.

P5 The planning system has a long established role in the delivery of affordable housing. We are committed to ensuring that new housing meets the needs of all members of society especially

those unable to afford to buy on the open market. Sustainable places are inclusive and welcoming to all; they do not exclude sections of the community or create ghettos of the affluent and the poor. The Welsh Government is committed to increasing the delivery of affordable housing in the areas where it is needed and will use its funding, land, planning and housing policies to drive delivery. We recognise that the affordability of housing is not uniform across Wales and different responses will be needed in different parts of Wales to meet the needs of local communities.

The Welsh Government will work with everyone involved in the planning and delivery of affordable housing, including those in the public, private and third sectors to achieve these aims.

Policy 6 – Planning in Mobile Action Zones ^{P6}

In Mobile Action Zones, local planning authorities and telecommunications operators will work together to increase mobile coverage collaboratively by identifying suitable sites and buildings for new equipment and infrastructure.

Considerable weight will be given to the need to increase mobile phone coverage, along with its associated economic benefits. Accordingly, there is a presumption in favour for new mobile telecommunications infrastructure, provided that there are no significant adverse landscape impacts.

Policy 7 – Ultra Low Emission Vehicles ^{P7}

The Welsh Government supports the increasing use of ultra low emission vehicles. We will work with the UK Government, local authorities, the energy sector and businesses to plan for and implement the roll out of electric vehicle charging infrastructure, including the creation of a network of rapid charging points to enable longer distance travel by electric vehicles throughout Wales.

Changing Technology: Mobile Communications

Mobile phones are an essential tool in our everyday lives. In addition to making calls, for many of us they are how we access media, e-mails, entertainment, services and information. They are becoming means of payment, tools to make transport arrangements, order our food and shopping and keep in touch with schools, public services and employers. Good mobile communications coverage is important to economic and social wellbeing.

- ^{P6} We are committed to ensuring all parts of Wales are supported by the telecoms infrastructure they need. We will identify Mobile Action Zones, focusing on areas of little or no coverage and where there is demand for new infrastructure, to provide a focus for our actions. We will work with mobile network operators, infrastructure providers and local authorities to increase digital connectivity in the Mobile Action Zones we identify.

Changing Technology: Ultra Low Emission Vehicles

Sustainable places will support a reduction in the need to travel, particularly by private vehicles, and a modal shift to walking, cycling and public transport. A transition away from petrol and diesel vehicles to ultra low emission (including electric) vehicles is also crucial to the achievement of the Welsh Government's carbon reduction targets.

- ^{P7} It is important that we plan and deliver the infrastructure, and in particular the charging infrastructure, that electric vehicles will rely on. We expect business and industry to drive much of the roll out of charging infrastructure. There is also an important role for the public sector and the Welsh Government will set out a strategy for electric charging infrastructure. We will keep under review the pace and geography of the delivery of charging infrastructure, particularly in rural areas, to ensure that no parts of Wales are left behind in this transition.

Changes in transport technology also offer the opportunity to change the way in which we travel. The advent of driverless cars will inevitably present new challenges and opportunities and could, in the future, completely transform the current concepts of private car ownership, especially within and close to our major urban areas.

Policy 8 – Strategic framework for biodiversity enhancement and ecosystem resilience ^{P8}

To ensure the enhancement of biodiversity and the resilience of ecosystems, the Welsh Government and its key partners will identify:

- areas which could be safeguarded as ecological networks for their potential importance for adaptation to climate change or other pressures, for habitat restoration or creation, or which provide key ecosystems services, to ensure they are not unduly compromised by future development; and
- opportunities where strategic green infrastructure could be maximised as part of development proposals, requiring the use of nature based solutions as a key mechanism for securing sustainable growth, ecological connectivity, social equality and public well-being.

Planning authorities should include these sites in their development plan strategies and policies in order to promote and safeguard the functions and opportunities they provide.

In all cases, cumulative action towards securing the enhancement of biodiversity and the resilience of ecosystems should be demonstrated as part of development proposals through innovative, nature-based approaches to site planning and the design of the built environment.

Supporting Strategic Green Infrastructure

The Welsh Government is committed to reversing the decline in biodiversity and increasing the resilience of our ecosystems. In collaboration with our partners, including Natural Resources Wales and local authorities, we will take strategic action to secure biodiversity enhancements, to safeguard ecological networks, and to maximise the use of green infrastructure and nature based solutions. Effective action is generally best undertaken at a regional or local level reflecting individual opportunities.

Planning Policy Wales sets out a range of policies to maintain and enhance biodiversity and promote the resilience of ecosystems, including the stepwise approach. The NDF's strategic focus on urban growth requires an increased emphasis on biodiversity enhancement in order to ensure that the approach is sustainable.

- ^{P8} We need to expand and make connections between our designated sites to increase the ability of species and ecosystems to adapt to the pressures of climate change and pollution. Strategic and Local Development Plans should consider how designated sites fit within the wider network of habitats, and assess what action needs to be taken to safeguard land which may be needed to connect or enlarge those sites in order

to contribute to their long-term resilience, to contribute to the wider resilience of ecological networks, or to protect and enhance ecological services.

Safeguarding is intended to ensure that areas of land that are potentially important for expanding or connecting ecological networks, adapting to climate change or other pressures, or which provide key ecological services, are not unduly compromised by development. Safeguarding does not necessarily prohibit development, but sets out a requirement to consider both the long-term future land needs of the habitats and species it is intended to protect and improve, and the present and predicted future needs for particular ecosystem services and functions. Areas may be safeguarded for a wide variety of reasons, including the need to increase the resilience or connectivity of certain habitat types, such as species rich meadows.

Local authorities and Natural Resources Wales should work together to ensure that appropriate action is taken to safeguard sites both within and beyond their administrative boundaries. Safeguarded areas should be identified through the Green Infrastructure Assessment, and set out in the development plan.

Strategic green infrastructure in and around urban areas

Urban ecosystems play a vital role in supporting physical and mental well-being. There are significant positive links between mental well-being and access to green space in urban areas, and we receive benefits not only by being more active, but also just through **being in and near** green spaces. Even limited open green space in dense urban areas can provide benefits to large numbers of people, provided that it is high quality and accessible.

As the population of Wales becomes increasingly urban, the opportunity to optimise well-being benefits from ecosystems will be greatest in these areas. Through the innovative use of nature-based solutions, and by increasing well-integrated green infrastructure in and around urban areas, development can restore natural features and processes into cities and landscapes, maintain and enhance the strategic functioning of our natural resources and ecological networks, and provide locally accessible, high quality green spaces and corridors.

Strategic Green Infrastructure mapping

Natural Resources Wales have produced indicative maps to illustrate national biodiversity themes. They provide the starting point for considering enhancement as part of green infrastructure assessments and a means of ensuring that cumulative action is taken to secure enhancement through development proposals.

Area Statements will develop this approach by identifying key challenges and opportunities to strengthen ecological networks and ecosystem services. They will provide a local scale evidence base and mapping of key environmental themes, and will identify areas where taking action at the right scale can maximise benefits. Any priority areas for action identified in Area Statements are a material planning consideration, and development plans should set out appropriate policies to safeguard and connect these areas, and to protect and enhance their identified key ecological functions and features.

Regional and local interventions can collectively contribute towards increasing the resilience of our national ecological networks. The Welsh Government expects Strategic and Local Development Plans to set out strategies that contribute to these aims through their Green Infrastructure Assessments, and form an appropriate policy response.

Woodlands provide a wide range of benefits for society, from abating carbon emissions and reducing flood risk in sensitive locations, to being increasingly important as community resources, and providing places for active recreation, education and lifelong learning. Our woods and forests underpin many economic activities and sectors and have a key role to play in replacing fossil fuels, storing carbon and helping us to cope with the effects of a changing climate. The 'right tree in the right place' plays a key role in realising these benefits.

Policy 9 – National forest ^{P9}

The Welsh Government is committed to developing a national forest, and will identify appropriate delivery sites and mechanisms to achieve this aim. Action to safeguard proposed locations for the national forest will be supported.

^{P9} An increase in woodland cover is needed to help build the resilience of our ecosystems, to secure the delivery of our climate change and decarbonisation aspirations, and to ensure that the productive potential of Welsh woodlands is maintained.

The Welsh Government has therefore set a target to increase woodland cover in Wales by at least 2,000 hectares per annum from 2020. A national forest will help achieve this target and improve well-being for people and communities.

The forest will be a national asset which could provide jobs in timber, leisure, tourism and other sectors. It is likely to be dispersed across a number of locations, and could act as a catalyst for improving land in need of regeneration. Any sites or development proposals, which require planning permission and forming part of this project, should be supported where appropriate. There is an opportunity for the national forest to be linked by green infrastructure incorporating active travel facilities and to become an important asset for local people and tourists.

Spatial strategy: Powering and heating places with renewable energy and District Heat Networks

The spatial strategy provides a long term context and framework for infrastructure investment and the protection of the environment and places a strong emphasis on the requirement to make the best use of our resources.

Growing our towns and cities will require clean energy and an efficient means of providing heat and power to homes and workplaces. This section sets out the spatial implications of our energy and heat needs.

Renewable Energy

Wales is abundant in opportunities to generate renewable energy and the Welsh Government is committed to maximising this potential. Generating renewable energy is a key part of our commitment to decarbonisation and tackling the causes of climate change.

We have set the following ambitious targets for the generation of renewable energy:

- For 70 per cent of electricity consumption to be generated from renewable energy by 2030.
- For one gigawatt of renewable energy capacity to be locally owned by 2030.
- For new renewable energy projects to have at least an element of local ownership by 2020.

Proposals for large scale energy development are classed as Developments of National Significance and are determined by Welsh Ministers. Proposals below the threshold for Developments of National Significance are determined by local planning authorities. Large scale energy developments include:

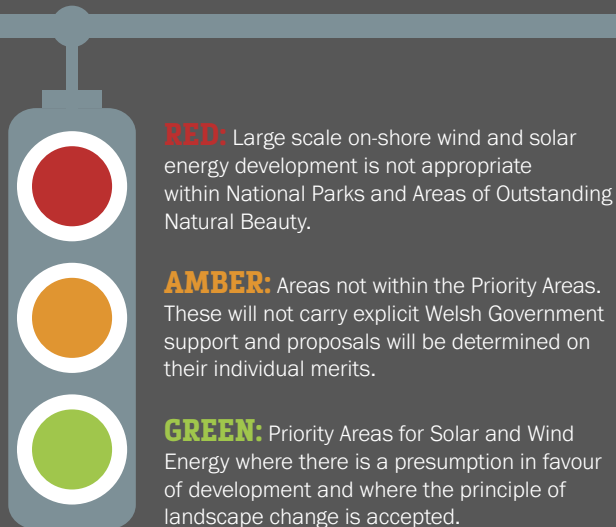
- All on-shore wind generation over 10 mega watts.
- Other renewable energy generation sites with generating power between 10 mega watts and 350 mega watts.

Our spatial priority is for large scale wind and solar development to be directed towards Priority Areas for Wind and Solar Energy shown on page 42. There is a presumption in favour of large scale on-shore wind and solar energy development in these areas, an acceptance of landscape change and a focus on maximising benefits and minimising impacts. Communities will be protected from significant cumulative impacts to avoid unacceptable situations whereby, for example, smaller settlements could be potentially surrounded by large wind schemes.

The Welsh Government will use its policy levers to assist in the delivery of renewable energy projects in these areas. The development of Priority Areas will assist in co-ordinating strategic action, bringing a critical mass of new renewables developments together to build the case for new or reinforced grid infrastructure. We will work with relevant stakeholders to help unlock the renewable energy potential of these areas and the economic, social and environmental benefits they can bring to communities.

The Welsh Government adopts a clear traffic light based approach to its policy on large scale wind and solar renewable energy projects.

These technologies are viable and deliverable, and have the greatest ability to make positive contributions to our renewable energy targets in the short-to-medium term:



Large scale wind and solar renewable energy development can be visually prominent. A strategic review of landscape and visual impact identified the Priority Areas for Solar and Wind Energy as the most appropriate locations to accommodate landscape change. There is, therefore, an acceptance of landscape change in these areas. However, the design and micro siting of proposals must minimise the landscape and visual impact, particularly those in close proximity to built-up areas.

Policy 10 – Wind and Solar Energy in Priority Areas ^{P10}

The Welsh Government supports large scale on-shore wind and solar energy development in the identified Priority Areas for Solar and Wind Energy. There is a presumption in favour of development for these schemes and an associated acceptance of landscape change.

When determining planning applications for large scale on-shore wind and solar energy development in Priority Areas, significant weight will be given to the proposal's contribution to reducing Wales' greenhouse gas emissions and meeting our decarbonisation and renewable energy targets.

Planning applications must demonstrate how local social, economic and environmental benefits have been *maximised* and the following adverse impacts have been *minimised*:

- landscape and visual impacts;
- cumulative impacts;
- the setting of National Parks and Areas of Outstanding Natural Beauty;
- visual dominance, shadow flicker, reflected light or noise impacts;
- electromagnetic disturbance to existing communications systems; and
- the following identified protected assets:
 - archaeological, architectural or historic assets;
 - nature conservation sites and species;
 - natural resources or reserves.

Suitable access to the site for construction and maintenance purposes must be provided. Plans must also be in place for the end of the development's lifetime, including the removal of all infrastructure as soon as their use ceases and the appropriate after-use of the site.

- ^{P10} Not all of the area within the Priority Areas for Solar and Wind Energy is suitable for the generation of renewable energy. Natura 2000 sites within the Priority Areas are excluded. Careful consideration will be given to the siting of schemes, particularly the cumulative impacts. Further guidance on the development of on-shore wind and solar energy schemes in Priority Areas will be produced to assist in the development process. The implementation of developments within the Priority Areas will be monitored against the Welsh Government's renewable energy targets.



Policy 11 – Wind and Solar Energy Outside of Priority Areas ^{P11}

Outside of the Priority Areas for Solar and Wind, planning applications for large scale wind and solar development must demonstrate the proposal is acceptable, in accordance with the criteria below.

Planning applications must demonstrate how local social, economic and environmental benefits have been maximised and that there are *no unacceptable adverse effects* on, or due to, the following:

- landscape and visual impacts;
- cumulative impacts;
- the setting of National Parks and Areas of Outstanding Natural Beauty;
- visual dominance, shadow flicker, reflected light or noise impacts;
- electromagnetic disturbance to existing communications systems; and
- the following identified protected assets:
 - archaeological, architectural or historic assets;
 - nature conservation sites and species;
 - natural resources or reserves.

Suitable access to the site for construction and maintenance purposes must be provided. Plans must also be in place for the end of the development's lifetime, including the removal of all infrastructure as soon as their use ceases and the appropriate after-use of the site.

Policy 12 – Wind and Solar Energy in National Parks and Areas of Outstanding Natural Beauty ^{P12}

Large scale on-shore wind and solar energy development is not acceptable within National Parks and Areas of Outstanding Natural Beauty.

^{P11} Outside the Priority Areas, large scale on-shore wind and solar energy developments may be appropriate. Applications will be determined based on the merits of the individual proposal and the onus is on the applicant to demonstrate that a proposal will not have an unacceptable impact on its surroundings.

^{P12} Large scale on-shore wind and solar energy development is not appropriate within National Parks and Areas of Outstanding Natural Beauty. Proposals close to the boundaries of these designated areas must demonstrate that the development will not undermine the objectives that underpin the purposes of the designation.

Policy 13 – Other Renewable Energy Developments ^{P13}

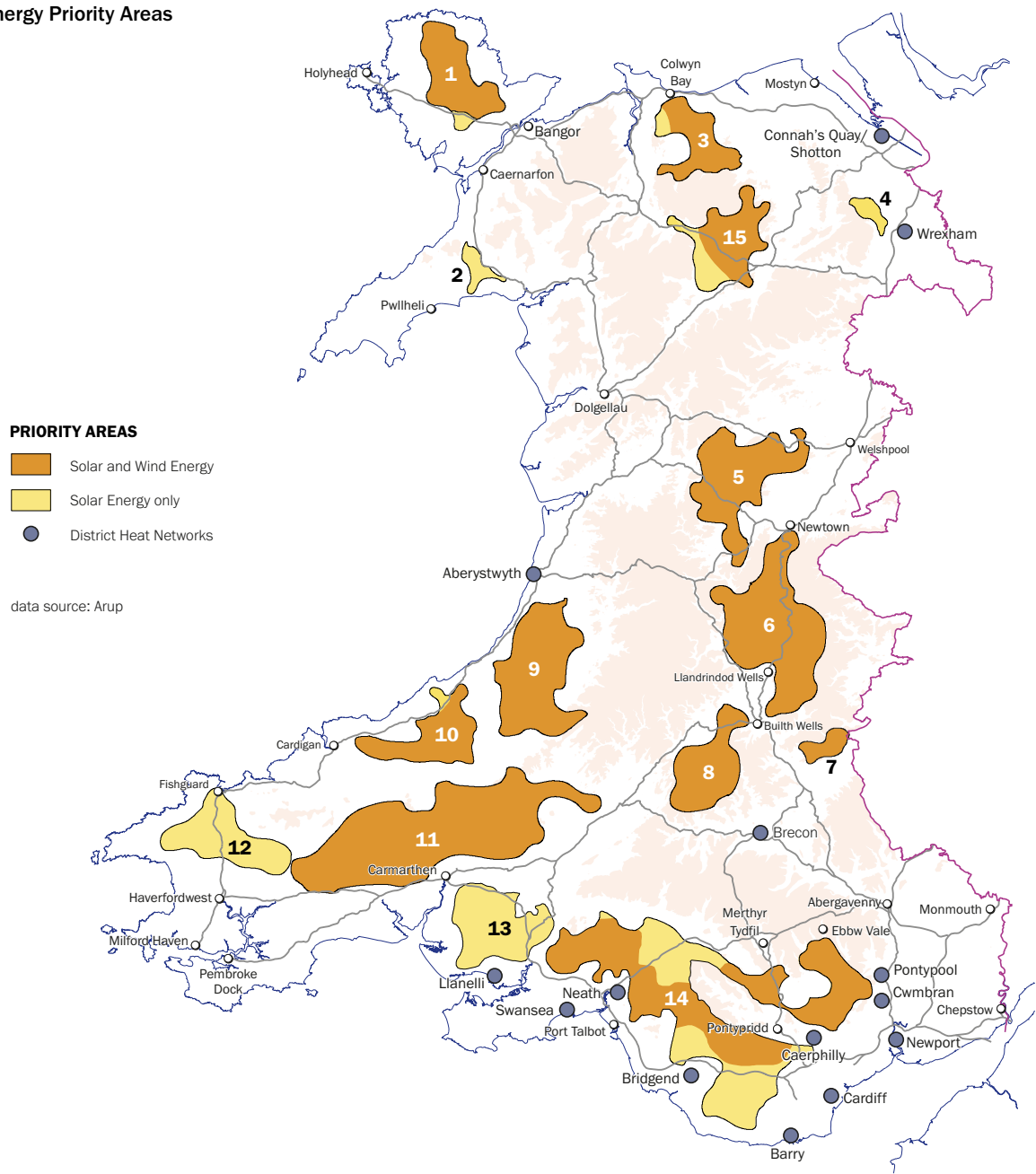
Proposals for other large scale renewable energy generation will be determined in accordance with the criteria of policy P11.

^{P13} Renewable energy technologies other than wind and solar are supported in principle. The Welsh Government is preparing an Energy Atlas to identify opportunities for all types of renewable projects. Proposals should ensure there is no significant unacceptable detrimental impact on the surrounding natural environment and local communities and that the development brings with it positive social, environmental and economic benefits.

Large scale renewable energy schemes can generate direct social and economic benefit to local communities across the country. Local ownership of projects in whole or part can ensure these benefits are accrued over the long-term, generating funds to develop community facilities and help address fuel poverty.

Renewable energy projects can also provide environmental benefits, such as contributing to resilient ecological networks, restoring degraded peatlands and restoring semi-natural grasslands on post-agricultural land. The Welsh Government encourages active consideration of how these benefits can be realised in all renewable energy developments. With all projects, provisions for access to the site for construction and maintenance of the scheme should recognise and respond to the environment in which they are located. The careful removal of infrastructure as soon as their use ceases and the appropriate after-use of the site will also ensure environmental benefits are realised.

Wales Energy Priority Areas



Policy 14 – Priority Areas for District Heat Networks ^{P14}

Within Priority Areas for District Heat Networks, planning authorities should identify opportunities for District Heat Networks and ensure they are integrated within new and existing development.

Policy 15 – Masterplanning for District Heat Networks ^{P15}

Large scale mixed used development should, where feasible, have a District Heat Network. Planning applications for such development should prepare an Energy Masterplan to establish whether a District Heat Network is the most effective energy supply option and, for feasible projects, a plan for its implementation.

District Heat Networks

District Heat Networks are a method of delivering heating and hot water to multiple buildings from a central heat source and, particularly in urban areas, can be the most effective way to provide low carbon heat. The Welsh Government supports the establishment of District Heat Networks, as part of delivering the urban growth focus of the Spatial Strategy.

- ^{P14} Our spatial priority is for the suitability and viability of District Heat Networks to be investigated in the towns and cities identified as Priority Areas for District Heat Networks shown on page 42. These are the areas in Wales considered to have the greatest potential for District Heat Networks. They have been identified on the basis of having a sufficiently high heat density to make them viable. They take into account settlement size, mix of uses, development potential and any existing work being undertaken to develop District Heat Networks. In principle, they are supported wherever they are viable.

- ^{P15} Planning authorities should explore and identify opportunities for District Heat Networks, particularly in the Priority Areas, and, where possible, seek to develop city or town-wide District Heat Networks in as many locations as possible.

As a minimum, proposals for large scale, mixed use developments of 100 dwellings or more should consider the potential for a District Heat Network. There is also potential for them below this threshold.

The design of new development should maximise the opportunities to accommodate a District Heat Network. Particular consideration should be given to the form, density, mix of uses and phasing of development.

5 The Regions

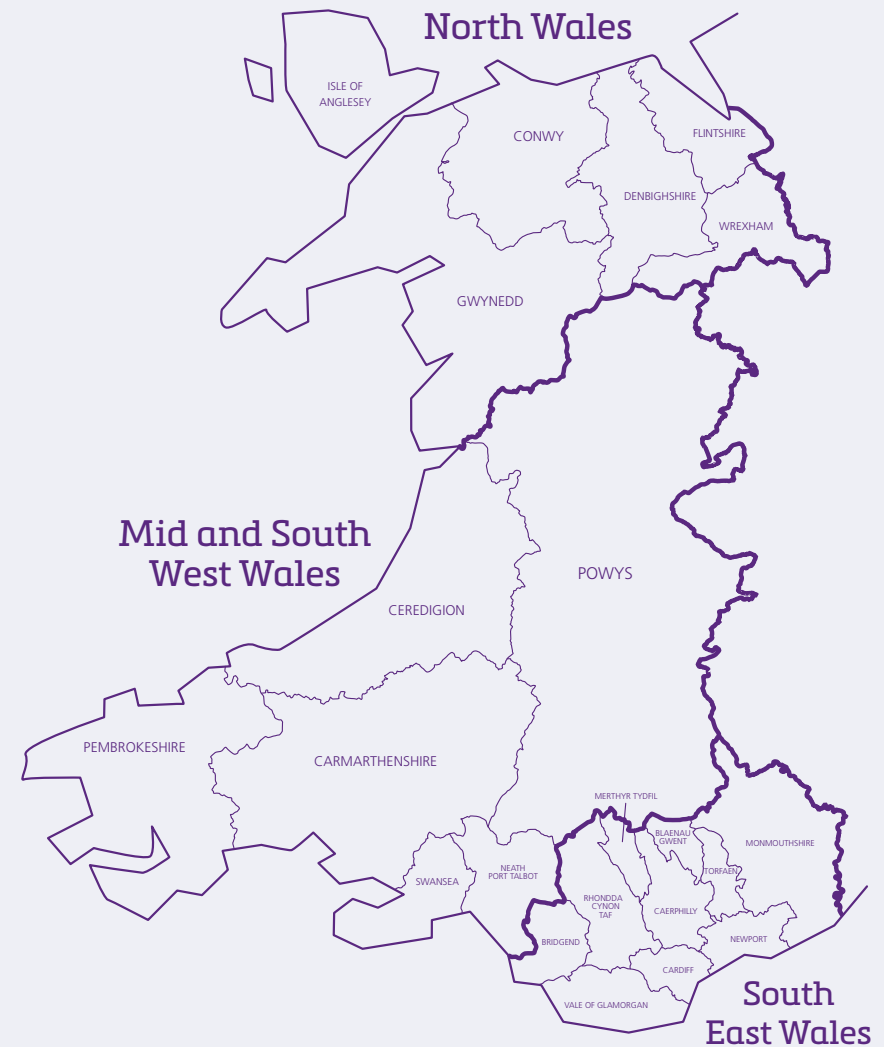
Wales' three regions provide a focus for Welsh Government policy and future investment. Each region has its own distinctive opportunities and challenges. Embracing these through more effective regional collaboration will lead to better outcomes for all parts of Wales and create a fairer distribution of wealth and opportunity.

The planning system has an important role to play in shaping regional development by co-ordinating and managing development across each region and by ensuring that wider than local issues are tackled collaboratively and strategically.

Strategic Development Plans are prepared at a regional scale. They consider strategic regional issues in relation to future growth areas, housing demand, economic development, transport and green infrastructure which cut across local planning authorities and require a regional, integrated planning response.

Informal regional arrangements including commitments to work together through traditional Local Development Plans or approaches to regional planning that do not result in the preparation of a Strategic Development Plan, do not constitute the form of regional planning required by the NDF.

The Development Plans Manual provides guidance on the preparation and revision of Strategic Development Plans and Local Development Plans.





Policy 16 – Strategic Policies for Regional Planning ^{P16}

Strategic Development Plans should embed placemaking as an overarching principle and should establish for the region (and where required constituent LDPs):

- a spatial strategy;
- a settlement hierarchy;
- the housing provision and requirement;
- the gypsy and traveller need;
- the employment provision;
- the spatial areas for strategic housing and employment growth, renewable energy and the identification of green belts, green corridors and nationally important landscapes;
- the location of key services, transport and connectivity infrastructure;
- a framework for the sustainable management of natural resources and cultural assets;
- ecological networks and opportunities for protecting or enhancing the connectivity of these networks; and
- a co-ordinated framework for minerals extraction and the circular economy, including waste treatment and disposal.

The Welsh Government requires Strategic Development Plans to come forward in each of the three regions to deliver the requirements of this policy.

^{P16} Strategic Policies for Regional Planning

Many policy areas are best considered at the regional scale and the role of a regional plan is to develop a clear policy framework that identifies these issues; develops a strategic policy response; and provides direction for decision makers in accordance with the plan-led system.

Local authorities and national, regional and local partners in the public, private and third sectors all have a contribution to make to the development of Strategic Development Plans and these plans can include other policy issues that are important at the regional scale. The preparation of Local Well-being Plans, Area Statements (Natural Resources Wales); regional transport models and plans (Transport for Wales); and the Welsh Government's Housing Need Assessment are examples of work that can directly support the preparation of Strategic Development Plans.

To deliver direction for their region, it is important that Strategic Development Plans are prepared. Local planning authorities should determine their geographical footprints. The Welsh Government will work with local planning authorities to support the establishment of Strategic Development Plans.

Alignment of Regional Development Plans and Strategies

It is important that Strategic Development Plans both shape and are shaped by other regional strategies, including the Welsh Government's Regional Economic Development Plans and City and Growth Deals. If key outcomes are not aligned or do not support one another, the region's ability to deliver will be undermined. Although different regional strategies will operate to different timeframes and may be revised at different times, regional plan makers should explore with regional partners how evidence and consultation activities can be joined.

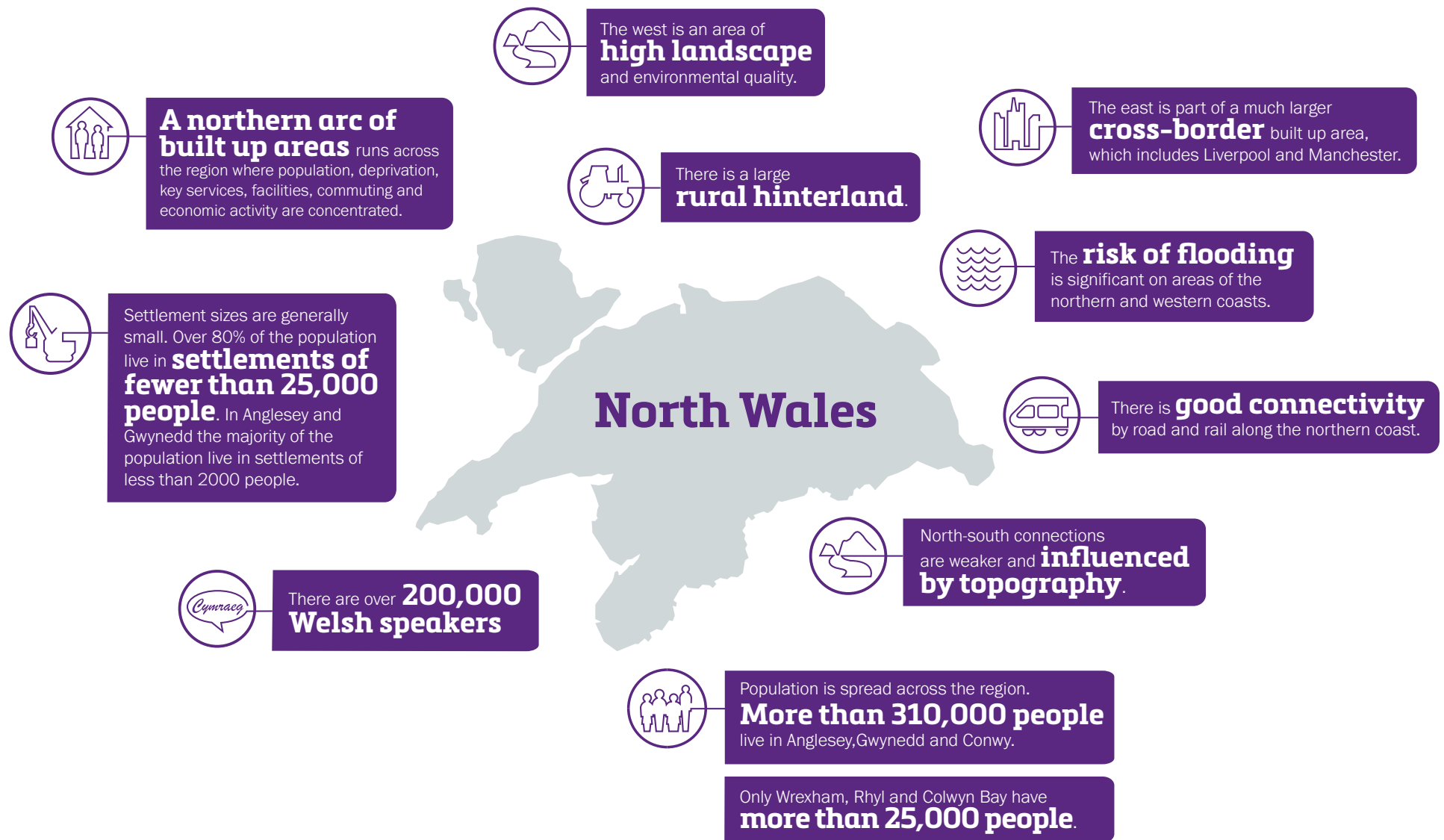
NDF Review & Regional Planning

The Welsh Government requires progress on regional planning across Wales and as part of the monitoring of the NDF, will monitor formal progress on the preparation of Strategic Development Plans.

The Three Regions

The following sections set out the NDF policies for each region and provide direction for the preparation of Strategic and Local Development Plans and decisions to be taken on planning proposals.





Policy 17 – Wrexham and Deeside P17

The Welsh Government supports Wrexham and Deeside as the primary focus for regional growth and investment. Wrexham and Deeside's role within the North region and the wider cross-border areas of Cheshire West and Chester and Liverpool City Region should be maintained and enhanced.

Strategic and Local Development Plans across the region should recognise Wrexham and Deeside as the focus for strategic housing and economic growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure; and consider how they can support and benefit from Wrexham and Deeside's regional role.

The Welsh Government will work with cross border authorities to promote Wrexham and Deeside's strategic role and ensure key investment decisions support Wrexham and Deeside and the wider region.

Overview

The North Wales region comprises Conwy, Denbighshire, Flintshire, Gwynedd, the Isle of Anglesey, Snowdonia National Park and Wrexham and is home to almost 700,000 people. Its dramatic landscape includes low lying coastal plains, mountain ranges and industrialised coal fields. The population is concentrated in an arc along the coast from the Menai Straits to the border with England and the main concentration of population is in the east around Wrexham-Deeside.

The regional issues that local planning authorities should work together to plan for, are set out below alongside the spatial policy areas that the Welsh Government will focus on from a national perspective to support the North region.

A collaborative, holistic approach

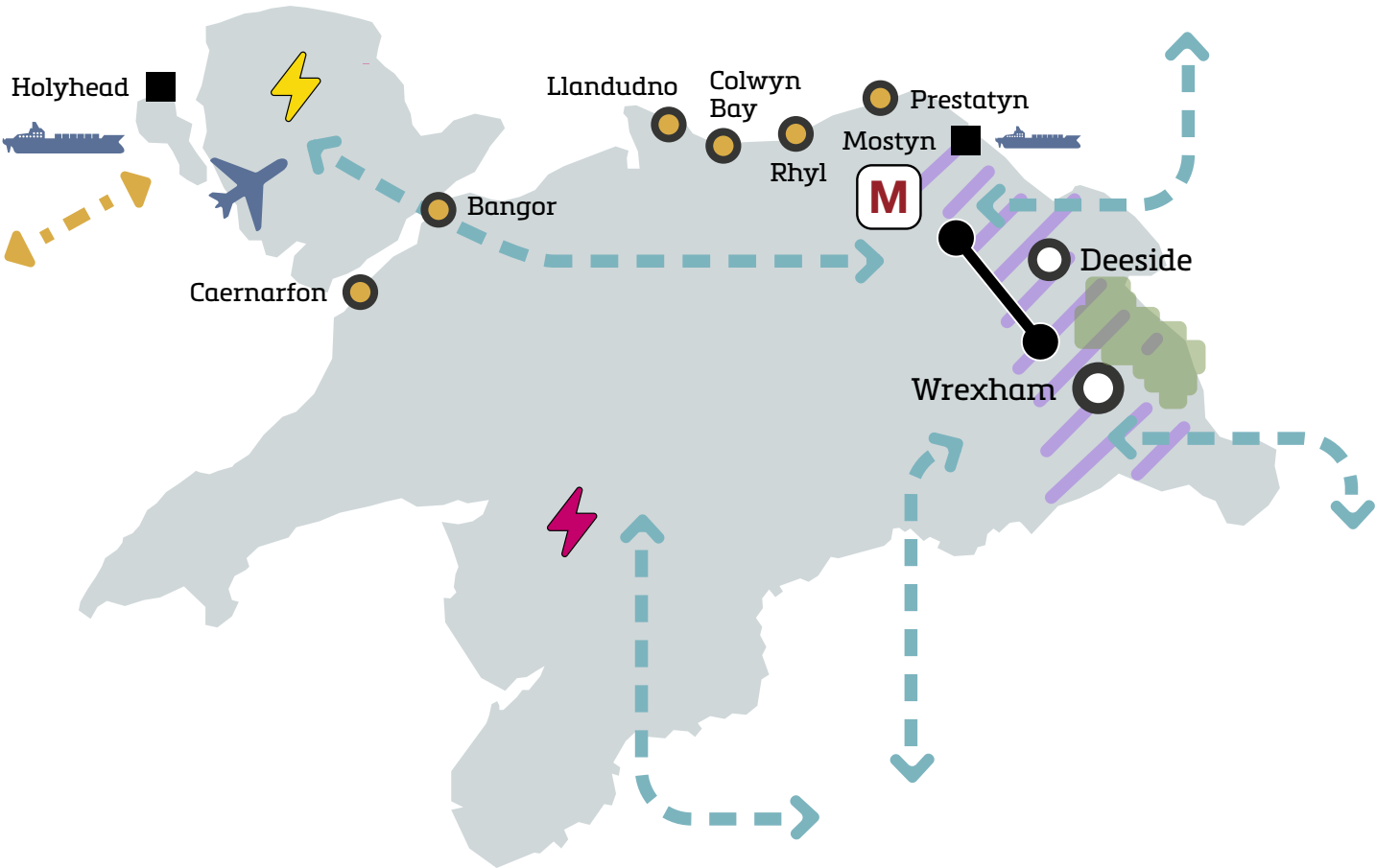
Across North Wales, there are a range of strategic issues that need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

Housing, economic growth and connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources and flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.

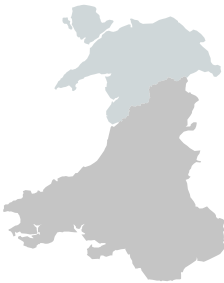
The region should work together to consider the connections with Mid & South West Wales, Cheshire West and Chester and North West England. Promoting accessibility and inter-linkages between these areas, based on an understanding of their roles and functions, will ensure these areas operate as a cohesive whole, and do not compete against each other or take strategic decisions in isolation.

Focus for growth

P17 In accordance with the NDF Spatial Strategy, growth in the North region should be focussed on the main existing built-up areas of Wrexham-Deeside. The Wrexham and Deeside area includes Wrexham (and Wrexham Industrial Estate), Broughton, Buckley, Deeside (and Deeside Industrial Park).



| | |
|----------------------------|--|
| National Growth Area | |
| Regional Connectivity | |
| Intra-urban Connectivity | |
| International Connections | |
| Ports | |
| Green Belt | |
| Anglesey Airport | |
| Centres of National Growth | |
| Centres of Regional Growth | |
| Anglesey Energy Island | |
| Trawsfynydd | |
| North Wales Metro | |



Policy 18 – North Wales Coastal Settlements P18

The Welsh Government supports the built up coastal arc from Caernarfon to Deeside as the focus for managed growth, reflecting this area's important sub-regional role supporting the primary growth area of Wrexham and Deeside.

Strategic and Local Development Plans across the region should recognise the role of this corridor as a focus for housing, employment and key services.

Policy 19 – Green Belts in North Wales P19

The Welsh Government supports the role of Strategic Development Plans identifying and establishing green belts to manage urban form and growth in North Wales, particularly around Wrexham and Deeside.

The Strategic Development Plan should consider the relationship of any new green belts with the green belt in Cheshire West and Chester.

P18 The built-up corridor along the North Wales coast from Caernarfon to Deeside includes Bangor, Llandudno, Colwyn Bay, Rhyl and Prestatyn. The Welsh Government expects the built up areas in this arc to continue to play an important role within the region, providing jobs; leisure and retail; cultural opportunities; education, health and services. It is important this corridor maintains its regional role and supports a managed growth approach that allows these roles to be enhanced. Regeneration opportunities in this corridor are strongly supported. Strategic and Local Development Plans across the region should recognise the role of this corridor as a focus for housing, employment and key services.

Flooding from rivers and sea is a major issue across the region. The potential for flooding around Wrexham and Deeside and along the North Wales coast will have implications for the delivery of growth in this area. Strategic decisions on flood management and related investment must be co-ordinated with decisions to direct development to growth areas.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates 19,400 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 51% of the additional homes needed should be affordable homes. These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based.

P19 Strategic decisions on the location of key services and infrastructure should support existing built-up areas and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations and support actions to address inequality and deprivation and improve links to neighbouring areas of England. The Welsh Government supports the use of green belts in the North region in managing and planning urban growth. Planning Policy Wales sets out the policy context for them. Strategic development plans must identify a green belt that includes the area to the north east of Wrexham.

Welsh language

With over 200,000 Welsh speakers across the region and with concentrations of settlements where Welsh is the first language for many people, it is important that development plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

A strong economy

The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders, will set out the priorities for future regional economic development. The planning system, through its Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should be informed by and seek to facilitate the delivery of the North Wales Growth Deal and ensure support for a smart, resilient and connected North Wales. It will provide a framework to take the strategic locational decisions that will support the long term ambitions of the Growth Deal in relation to housing, economic growth, key services and essential infrastructure. They should also consider the importance of key economic sectors across the region.

Tourism is an important sector to the economy across North Wales. Strategic and Local Development Plans should consider the main tourism areas, the type of visitors they attract and the infrastructure required to support existing areas and future growth.

Universities have an important presence in the region, providing further education, undertaking research and supporting innovation, providing employment, attracting students to Bangor and Wrexham and supporting the local businesses and communities around them.

The Strategic Development Plan should seek to maximise opportunities arising from investment in high value manufacturing sectors. Supported by the Welsh Government, the Advanced Manufacturing Research Institute at Broughton, when built in 2020, will be a collaboration between the University of Sheffield's Advanced Manufacturing Research Centre, Deeside Enterprise Zone Advisory Board, Swansea University and Coleg Cambria. It will support Airbus and other key high value manufacturing companies and will focus on R&D in advanced manufacturing techniques and skills development, for high value manufacturing aerospace, automotive, nuclear and food sectors.

The Welsh Government strongly supports resilient and prosperous rural communities, as set out by policy P4, and expects to see development plans across the region responding positively to the aims of this policy.

Policy 20 – Port of Holyhead ^{P20}

The Welsh Government will work with port operators, local authorities and investors to support the development of the port and facilitate new investment in order to ensure that its strategic gateway role is maintained and enhanced. Investment to improve the port's capacity to accommodate cruise ships is supported. New development around the port should be carefully managed to ensure that future expansion and change at the port is not constrained or compromised.

Policy 21 – Transport Links to North West England ^{P21}

The Welsh Government will work with local and regional authorities in North Wales and North West England to ensure transport investments, including in the North Wales Metro, strengthen cross-border transport links.

Strategic and Local Development Plans should support improved transport links between North Wales, Chester, Liverpool and Manchester and plan growth to maximise the potential opportunities arising from better regional connectivity.

A connected, accessible region

^{P20} The region is served by ports at Holyhead and Mostyn. The Welsh Government recognises the importance of the port at Holyhead to Anglesey, North Wales, Wales, the wider UK and Ireland. Holyhead is a major regional asset and an important gateway to Wales and can be the first experience people have of visiting Wales. It is important they have a positive experience. Strategic and Local Development Plans should consider and plan for its future development needs and maximise the opportunities it provides to support growth across the region. A new cruise terminal can provide enhanced facilities for ships and passengers and be a gateway for visitors to the north of Wales. Mostyn plays an important role in supporting the off-shore renewable energy sector.

^{P21} Proposals for a North Wales Metro provide an opportunity to improve accessibility across the region and are supported by the Welsh Government. In accordance with P16, Strategic Development Plans must ensure that long term strategic decisions maximise the opportunities in areas that will benefit

from improved accessibility and investment in public transport services. There are strong functional relationships between settlements and regions in North Wales and North West England, with people travelling daily in both directions to access jobs, services and facilities in neighbouring regions.

Strategic and Local Development Plans should be confident in seeking to align areas of need with areas of opportunity, including where areas of opportunity are across the border and resulting investment and action is focussed on improving the links between Welsh communities and economic opportunities in England.

The Welsh Government will maintain its commitment to tackling congestion on the A55 including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network. Where connectivity corridors between North Wales and England are identified, the potential for these corridors to become green infrastructure will be explored.

Policy 22 – North West Wales and Energy ^{P22}

The Welsh Government supports North West Wales as a location for new energy development and investment.

New energy-related development should support local and regional communities; provide jobs and investment in training and skills; and work with universities and businesses across the region and North West England to co-ordinate and maximise new investment to support the wider region.

In determining any applications for nuclear energy generating stations in this region, consideration should be given to the need for further non-renewable energy generation, their contribution towards Wales' energy mix, their impacts on the natural and historic environment and the economic benefits they would bring to the region.

A unique region

Managing the North's outstanding natural resources, which include the coast, two world heritage sites, a national park, Areas of Outstanding Natural Beauty and minerals is a priority for the region and it should be ensured they can be enjoyed by future generations and help provide economic benefits for the region's communities. The region's distinctive heritage should be preserved and enhanced by high quality development.

^{P22} The planning system has a key role in supporting renewable energy and ensuring the North plays its part in decarbonising society. The region has strong potential for generating wind, solar and tidal energy.

The Welsh Government supports the North West Nuclear Arc initiative which is a shared vision (with the UK Government, universities and the National Nuclear Laboratory) of realising the potential positive impacts the nuclear sector can bring to an area in terms of investment, skills and training. The Anglesey 'Energy Island' Programme also seeks to co-ordinate action around new energy developments to maximise the benefits for the area.

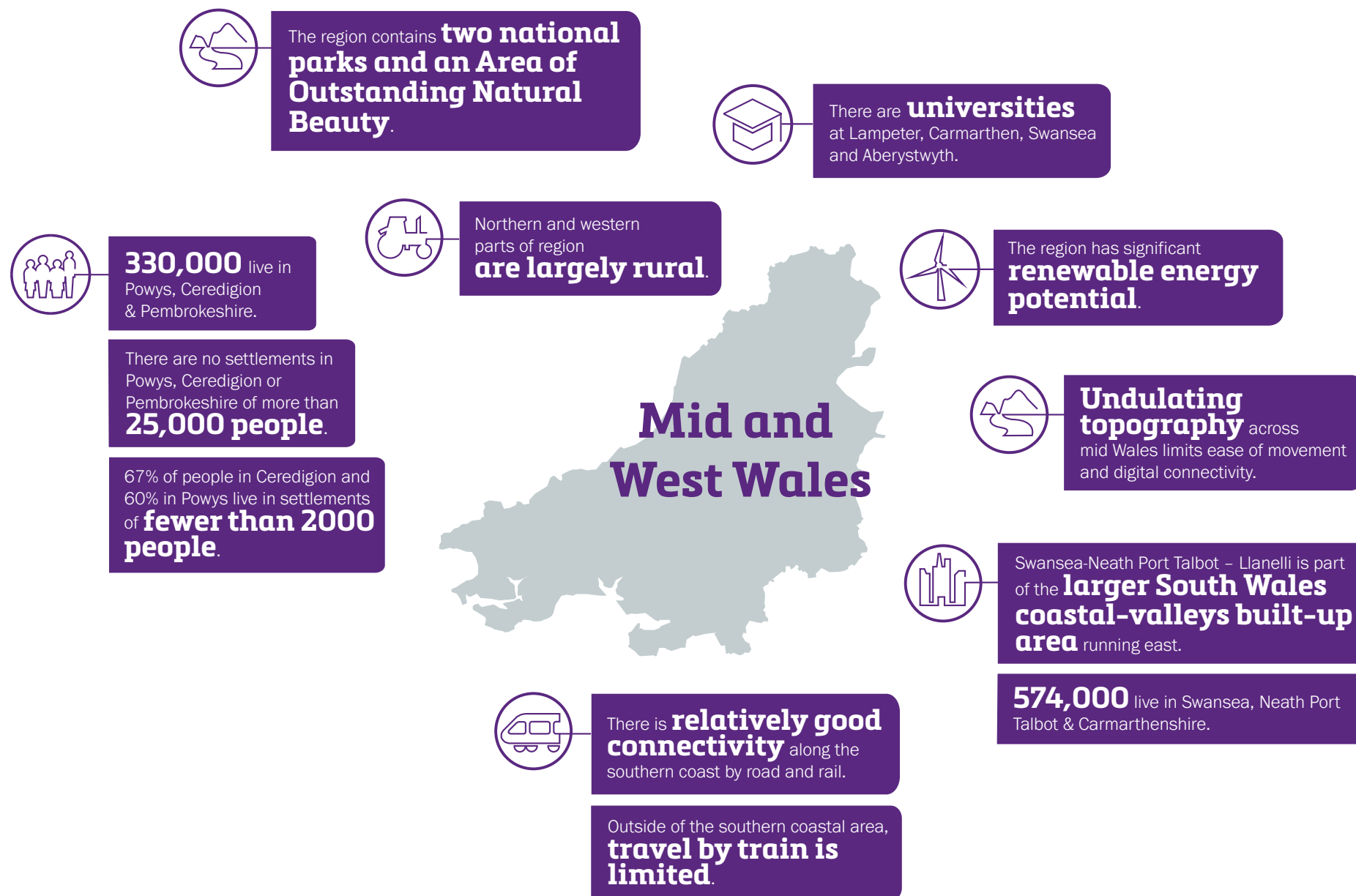
The potential Wylfa Newydd nuclear power station development could provide significant employment, training and other associated economic benefits across the whole region if a decision is made to proceed with the scheme. Small Modular (nuclear) Reactors could also potentially provide low carbon energy generation in the region. Trawsfynydd is currently being promoted by the Snowdonia Enterprise Zone Advisory Board as a

potential site for a Small Modular Reactor, building on the existing sector-specific technical capacity and expertise available locally.

The potential economic benefits of new nuclear developments, particularly in terms of their high-value job creation may provide a catalyst for regional development. However, these considerations will need to be balanced against the long-term impact these large-scale developments can have on sensitive areas and the surrounding environment.

The region's concentration of population, its historic and future growth and proximity to markets in North West England mean it is a high consumer of materials and natural resources. It is vital the region makes the best use of material resources, promotes resource efficiency and is ambitious in supporting innovative ways of promoting a circular economy.

Within the region sand and gravel extracted primarily from Wrexham and Flintshire and crushed rock aggregates from Flintshire, serve both local markets and those in North West England. Whilst similar deposits exist in North West Wales, particularly in Gwynedd, these are less well-placed to serve the main markets and production is therefore more limited. Conwy and Denbighshire play an important role providing limestone for development and infrastructure projects along the North Wales coast. The quarrying of slate aggregate is largely constrained by National Park and Area of Outstanding Natural Beauty designations and, where extracted, it is generally used locally or for high value developments further afield.



Overview

The **Mid and South West Wales** region comprises Carmarthenshire, Ceredigion, Neath Port Talbot, Pembrokeshire, Powys, Swansea and the Brecon Beacons and Pembrokeshire Coast National Parks and has a population of over 900,000 people. This large and diverse region includes some of the most rural and sparsely populated parts of the UK and the urbanised, industrialised built up areas around Wales' second city, Swansea. The population is concentrated in the south around Swansea Bay and Llanelli, with a secondary cluster of towns around the Milford Haven waterway and across the region's larger towns which include Aberystwyth, Carmarthen, Llandrindod Wells and Newtown.

The regional issues that local planning authorities should work together to plan for are set out below, alongside the spatial policy areas the Welsh Government will focus on from a national perspective to support the Mid and South West region.

A collaborative, holistic approach

Across Mid and South West Wales, a range of strategic issues need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

Housing, economic growth and connectivity infrastructure should be co-ordinated and planned across the whole region. The management of natural resources and flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on

locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.









The size and diversity of this region, which includes Wales' second city, two national parks and some of the most rural areas of the UK, means that the region does not have the degree of interconnectedness of other regions. From a high level national perspective, there are two broad spatial sub-regions – the built up areas around Swansea, Neath Port Talbot, southern Carmarthenshire and the Haven towns, and the dispersed settlements in a wider rural hinterland across north Pembrokeshire, Ceredigion, Powys and northern Carmarthenshire.

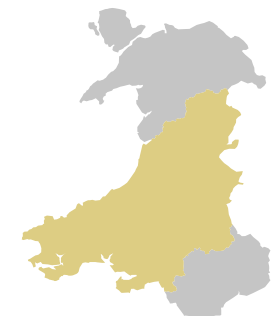
There will be common strategic issues for the region and issues which are specific to sub-regions. It will be for local planning authorities to determine how regional planning should be undertaken across the region. It may be that a combination of a Strategic Development Plan and one or more Joint Local Development Plans are required. The Welsh Government will support approaches that define and focus on sub-regions, rather than a single full region, where it is demonstrated this is appropriate.

Focus for growth

In accordance with the NDF Spatial Strategy, growth in the Mid and South West Region should primarily be focussed in the Swansea Bay and Llanelli area and in a secondary role, the Haven Towns, Carmarthen, Llandrindod Wells, Newtown and Aberystwyth.



| | |
|----------------------------|---|
| National Growth Area |  |
| Regional Connectivity |  |
| Intra-urban Connectivity |  |
| International Connections |  |
| Ports |  |
| Swansea Bay Metro |  |
| Centres of National Growth |  |
| Centres of Regional Growth |  |



Policy 23 – Swansea Bay and Llanelli ^{P23}

Swansea Bay and Llanelli will be the main focus for regional scale growth and investment.

Regional and local development plans should recognise Swansea Bay and Llanelli as the focus for strategic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from their strategic regional role.

The Welsh Government will promote Swansea Bay and Llanelli's strategic role and ensure key investment decisions support it and the wider region.

Policy 24 – Regional Centres ^{P24}

The towns of Carmarthen, Llandrindod Wells, Newtown, Aberystwyth and the four Haven Towns will be the focus for managed growth, reflecting their important sub-regional functions.

Regional and local development plans should recognise the roles of these settlements as being a focus for housing, employment and key services within their wider areas and consider how they continue as a focal point for sub-regional growth.

^{P23} The Welsh Government supports the Swansea Bay and Llanelli area (comprising Neath, Port Talbot, the City of Swansea and Llanelli) as the primary growth area for the region. This area is the main existing centre of population, employment and services and is served by the main connectivity infrastructure. The area can accommodate new growth in a planned and co-ordinated way, to support the needs of the wider surrounding region.

^{P24} The Welsh Government supports the role of the regional centres of Carmarthen, Llandrindod Wells, Newtown, Aberystwyth and the four Haven Towns (Milford Haven, Haverfordwest, Pembroke and Pembroke Dock). These places play important sub-regional roles, providing jobs; leisure and retail; education and health services; and connectivity infrastructure that is used and relied on by both their own populations and communities around them. It is important that these settlements maintain their regional role and support a managed growth approach that allows their roles to be enhanced.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates

23,400 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 44% of the additional homes needed should be affordable homes. These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based and should be considered at the regional scale.

Strategic decisions on the location of key services and infrastructure should support existing communities and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations and support actions to address inequality and deprivation. In the east of the region, links to the English Midlands provide an opportunity to build upon existing functional relationships, particularly in relation to housing, employment markets and public services. Joint planning and infrastructure delivery is supported where it contributes to the well-being of the region's communities. Strategic and Local Development Plans should be confident in seeking to align areas of need with areas of opportunity, including where areas of opportunity are across the border and resulting investment and action is focussed on improving the links between Welsh communities and economic opportunities in England.

Policy 25 – Haven Waterway ^{P25}

The Welsh Government supports continued operations and future development at Haven Waterway.

Strategic and Local Development Plans should support its growth and seek to maximise the benefits it provides to the region and Wales. The Welsh Government will work with operators, local authorities and investors to support and facilitate appropriate new development.

Welsh language

With strong Welsh speaking heartlands in the region, it is important that Strategic and Local Development Plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

A strong rural Wales

The Welsh Government strongly supports resilient and prosperous rural communities, as set out in policy P4, and expects to see development plans across the region responding positively to the aims of this policy.

Regional plans should provide a strong and positive framework to support rural communities across the Mid and South West region. They should consider how jobs, services and homes can be provided within rural communities, so that rural settlements are able to sustain themselves and grow. Regional plans should also consider how people will access the jobs and services they rely on outside their community. Accessibility and inter-linkages between settlements, based on an understanding of their roles and functions, is an important component of strategic planning and key locational decisions should be fully informed by the needs of rural communities and how they will access jobs and services.

The Growing Mid Wales Partnership have set out an important framework for action to grow productivity, innovation and jobs across Mid Wales and are making the case for a regional growth deal. Regional plans will have a key role to play in facilitating the infrastructure that will support economic growth and co-ordinating it with the delivery of new homes and services.

A strong city region

The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders, will set out the priorities for future regional economic development. The planning system, through Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should be informed by the Swansea Bay City Region City Deal and Economic Regeneration Strategy. They should ensure that key locational decisions on housing and employment sites, key services and essential infrastructure are planned to support and benefit from the investment and projects across the region; and consider the role of the universities in supporting growth and innovation.

The region is served by ports at Milford Haven, Port Talbot, Swansea and Fishguard and plays an important role supporting the maritime sector and the national economy. They are important national infrastructure and supporting their future role locally, regionally and nationally is a key consideration.

^{P25} The Haven Waterway has a unique combination of a natural harbour, long established industries and the potential for new strategic development. Development plans should recognise this and provide a framework for managing future growth.

Policy 26 – Swansea Bay Metro ^{P26}

The Welsh Government supports the development of the Swansea Bay Metro and will work with agencies to enable its delivery.

Strategic and Local Development Plans should support the scheme and plan growth to maximise the potential opportunities arising from better regional connectivity.

^{P26} The Strategic Development Plan should seek to improve connectivity across the region and should consider long term proposals such as the Swansea Metro scheme, which can provide a basis for better integrating land-use and transport planning. The Metro provides an opportunity to improve accessibility across the region and is supported by the Welsh Government. In accordance with P16, development plans must ensure that long term strategic decisions maximise the opportunities in areas that will benefit from improved accessibility and investment in public transport services. Where new transport corridors are created by the Metro scheme, the potential for these corridors to incorporate green infrastructure must be explored. The Welsh Government will maintain its commitment to tackling congestion on the M4 and trunk road network including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network.

A resource rich region

Mid and South West Wales has outstanding natural resources, which include the coast, two national parks, an Area of Outstanding Natural Beauty, minerals, agricultural land, water and a high quality landscape. Development plans should provide a framework for their management and enhancement, enabling them to be enjoyed by future generations and to provide economic benefits for the region's communities.

It is vital the region plays its role in decarbonising society and supports the realisation of renewable energy. There is strong potential for wind, tidal and solar energy generation and development plans should provide a framework for generation and associated infrastructure.

The region's minerals and aggregates play an important role in supporting development across Wales and England. There are active quarries in the region, primarily within Pembrokeshire Coast National Park and Ceredigion, supplying sand and gravel mainly for local markets. Powys is an important focus for sandstone and igneous rock extraction and fulfils demand both in and outside of Wales.

A diverse region

The Mid and South West region supports a large and diverse tourism industry. Development plans and decisions on planning applications should provide a positive framework to support growth and ensure that communities across all parts of the region are able to benefit from their landscapes, natural and historic environment, heritage assets and visitor attractions to support and grow their economies. It is important the region's distinctive heritage is preserved and enhanced by high quality development.



Almost half the population of Wales live in the region and there are over 150,000 Welsh speakers.

The region's population grew **by over 9% between 1997–2017**.

Population growth between 1997–2017 has been uneven, with the **largest growth in Cardiff**.

There are significant populations in built up areas **across the whole region**.



The valley topography in the north of the region has defined settlement and movement patterns.



Rural areas in the east and south of the regions are **well connected to main urban centres**.



The region is served by **Cardiff Airport and major ports** at Cardiff, Newport and Barry.



Connectivity is good east-west by road and rail in the southern part of the region.



Road connectivity is good east-west along the heads of the valleys.

Connectivity from the valleys to the coast is along the linear valley floors.

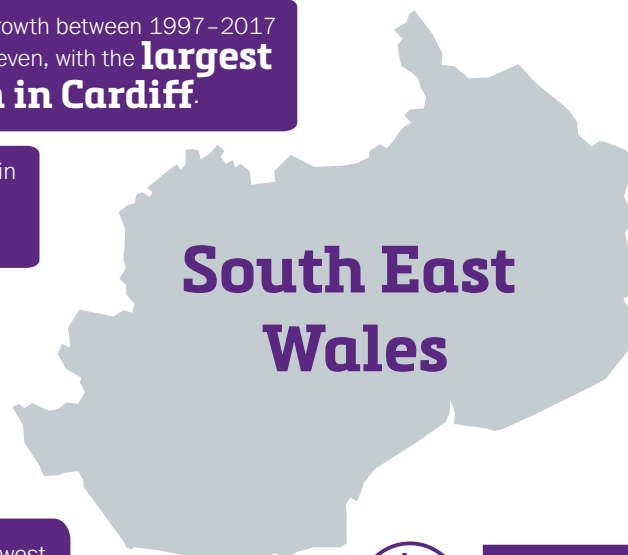


Major population centres are in the **Valleys and two cities**.

The majority of people live in settlements of at least **25,000 people**.

There are over **640,000 people** in Rhondda Cynon Taf, Caerphilly, Torfaen, Blaenau Gwent, and Merthyr Tydfil.

Continuous built up areas are a distinctive feature of the valleys.



Policy 27 – Cardiff ^{P27}

Cardiff will retain and extend its role as the primary national centre for culture, sport, leisure, media, the night time economy and finance.

The Welsh Government supports regional development which addresses the opportunities and challenges arising from Cardiff's geographic location and its functions as a Capital City.

The Welsh Government supports Cardiff's status as an internationally competitive city and a core city on the UK stage.

Overview

The **South East Wales** region comprises Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Rhondda Cynon Taf, Torfaen and the Vale of Glamorgan and is the most populous region of Wales, with over 1.5 million residents. It is a major city region on a UK scale. The region is the smallest geographically of the three regions and includes the coastal cities of Cardiff and Newport and the former industrial heartlands of the South Wales Valleys.

The regional issues that local planning authorities should work together to plan for are set out below alongside the spatial policy areas that the Welsh Government will focus on from a national perspective to support the South East region.

A collaborative, holistic approach

Across South East Wales, there are a range of strategic issues that need to be considered. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.

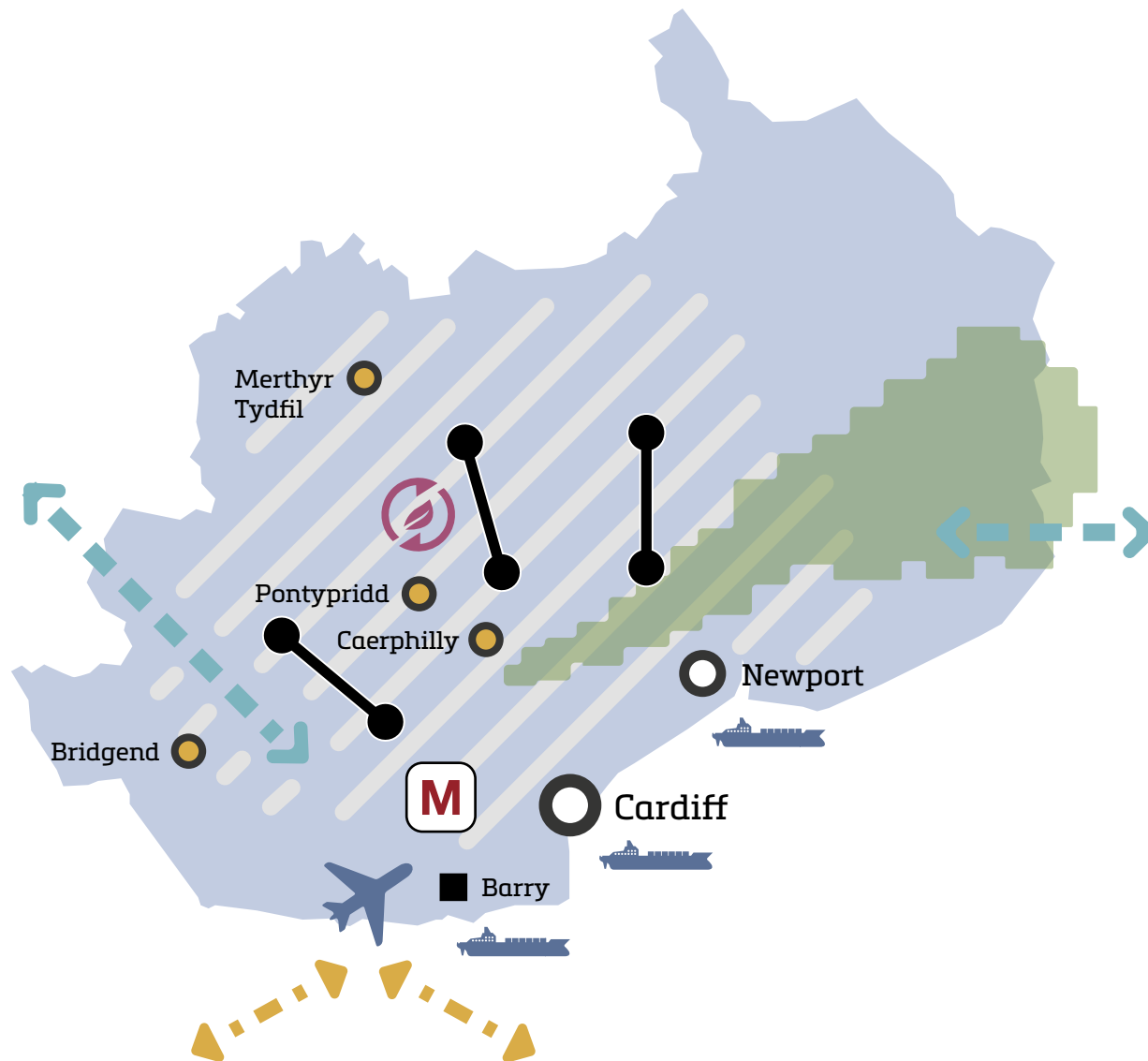
Housing, economic growth and connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources, flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonising society and responding to the threats of climate change should be central to all regional planning.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan to ensure that all parts of the region are working together to achieve the region's goals. A Strategic Development Plan should focus on the movement of people across the region and support an integrated approach to strategic land-use and transport planning. Key locational decisions including for employment centres, strategic housing growth and services should focus on the most sustainable and accessible locations and seek to address congestion, reduce car based commuting and improve air quality.

Focus for growth

In accordance with the NDF Spatial Strategy, growth in the South East Region should primarily be focussed in Cardiff, Newport and the Valleys.

^{P27} Cardiff will remain the primary settlement in the region, its future strategic growth shaped by its strong housing and employment markets and it will retain its capital city role, accommodating higher level functions and attractions. Strategic and Local Development Plans will need to consider the interdependence of Cardiff and the wider region. Cardiff relies on people from across the full region and ensuring communities around the Capital are vibrant, prosperous and connected helps to support Cardiff.



National Growth Area



Regional Connectivity



Intra-urban Connectivity



International Connections



Ports



Green Belt



Valleys Regional Park



South Wales Metro



Cardiff Airport



Centres of National Growth



Centres of Regional Growth



Policy 28 – Newport ^{P28}

The Welsh Government supports Newport as the focus for regional growth and investment and wants to see the City play an increased strategic role in the region. The strategic emphasis should be focussed on achieving growth in the city.

Strategic and Local Development Plans across the region should recognise Newport as a focus for strategic housing and economic growth; essential services and facilities; transport and digital infrastructure; and consider how they can support and benefit from Newport's increased strategic regional role. Development in the wider region should be carefully managed to support Newport's growth and to provide a focus for regional planning.

The Welsh Government will work with authorities within the region and in England to promote Newport's strategic role and ensure key investment decisions in Wales and England support Newport and the wider region.

Cardiff is currently experiencing a period of growth in population and employment, but the city cannot continue to expand indefinitely without major consequences for the environment. It is a compact city nearing its physical limits, which include Caerphilly and Garth mountains to the north and the Bristol Channel to the south. Cardiff must generate and support regional growth throughout the south east while enhancing its status as a vibrant capital city of Wales.

The Strategic Development Plan will need to consider the interdependence between Cardiff and the wider region. Regional transport infrastructure reflects the significance of Cardiff and has consolidated its role as the main focal point of the region. The potential to reach central Cardiff quickly and conveniently using the Metro generates opportunities for development in settlements outside the city. The cultural and economic strength of Cardiff must generate region-wide prosperity and well-being.

^{P28} The Welsh Government is determined to see development and growth in Newport, allowing the city to fulfil its potential as a second focal point for the region. It has significant brownfield development opportunities to provide new housing and employment areas. There are emerging highly skilled employment opportunities in the transport and digital communications sectors which should be catalysts for further economic investments. The Metro will improve the city's public transport system, especially within the city and to surrounding towns. It benefits from established road and rail links with Cardiff, Bristol and London.

Growth at Newport will help manage the development pressures in Cardiff and provide a strategic focus for the eastern part of the region. Strategic growth should be focussed in and immediately adjoining Newport itself, to support brownfield regeneration.

The South East region includes some of the most distinctive landscapes in the country. Few areas in the UK have been as shaped by their natural resources as the South Wales Valleys, which in turn drove the growth of the coastal communities. The legacy of 20th Century industrial decline remains a major issue. The commitment to addressing these challenges has been strong and the work of local authorities, the third sector and businesses has delivered investment and supported large-scale regeneration initiatives. Strategic and Local Development Plans should focus on how further regeneration can be achieved; how sustainably located brownfield sites can be brought back into use; and how communities can access the homes, jobs and services they need. It is important to preserve and enhance the region's cultural heritage with high quality development.



Policy 29 – The Heads of the Valleys ^{P29}

The Welsh Government supports co-ordinated regeneration and investment in the Heads of the Valleys area to increase prosperity and address social inequalities. The Welsh Government will work with local authorities, businesses, the third sector, agencies and stakeholders to support investment, including in the manufacturing sector, and to ensure a regional approach is taken to addressing issues in the Heads of the Valleys area.

Strategic and Local Development Plans across the full region must identify how they can support, both directly and through a joined-up regional approach, the Heads of the Valleys area to deliver greater prosperity, support regeneration and improve well-being.

Policy 30 – Green Belts in South East Wales ^{P30}

The Welsh Government requires the identification of green belts through a Strategic Development Plan to manage urban form and growth in South East Wales, particularly around Newport and the eastern part of the region.

Regional plans should consider the relationship of any new green belts with the green belt around Bristol.

^{P29} The Heads of the Valleys area, covering the northern parts of Rhondda Cynon Taf, Merthyr Tydfil, Caerphilly, Blaenau Gwent and Torfaen, is a priority area for the Welsh Government and should be a priority for the Strategic Development Plan. The area, like the Valleys more generally, has one of the most distinctive urban settlement patterns in the UK; has seen significant investment in the A465, from EU funding programmes and in the future through the South Wales Metro. It has the potential to build on its tourism offer and proximity to the Brecon Beacons National Park. National, regional and local strategies, plans and investment must be co-ordinated and focus on those interventions that can address the structural economic and social issues that impact upon communities' prosperity and well-being.

Planning and co-ordinating the delivery of new housing to meet identified needs will be an important task for the regional planning process. Under the Welsh Government central estimates 71,200 additional homes are needed in the region until 2038 and over the initial five years (2018/19 to 2022/23) 48% of the additional homes needed should be affordable homes.

These estimates provide part of the evidence and context on which Housing Requirements for Strategic Development Plans can be based and should be considered at the regional scale. It is vital that housing is considered at the regional level and not on the basis of the aspirations of individual local planning authorities. Understanding and managing different development pressures across the region will be a key issue and Strategic Development Plans will need to consider housing need across the full region.

^{P30} Strategic decisions on the location of development, key services and infrastructure should support the region's cities and Valleys communities and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations within the context of the whole region. The Welsh Government supports the use of green belts in the South East region in managing and planning urban growth. Planning Policy Wales sets out the policy context for them. The Strategic Development Plan must identify a green belt that includes the area to the north of the M4 from the Severn Crossings to North Cardiff.

A growing, equitable region

The South East region accounts for 51% of the total economic output of the Welsh economy and accounts for over 55% of additional housing need in Wales during the next few years, with estimates suggesting this proportion will increase in the future. The Regional Economic Development Plan prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders will set out the priorities for future regional economic development. The planning system, through Strategic and Local Development Plans and the decisions it takes, will have a major role to play in shaping the places that support and strengthen the regional economy.

The Strategic Development Plan should seek to maximise opportunities arising from investment in the compound semiconductor sector. Compound semiconductor technology lies at the heart of the next industrial revolution and is a technology growing rapidly in Wales. The technology underpins a range of products including smartphones, Wi-Fi, satellite communication systems, robotics and efficient LEDs. In Wales, industry, academia and Governments are working to develop a world class compound semiconductor cluster. By developing these capabilities in the region, Wales has established the core elements for a compound semiconductor ecosystem that will help bridge early stage research, applied industrial research and innovation through to high volume manufacturing and its supporting supply chain.

Prosperity is not uniform across the region. The Cardiff Capital Region City Deal has made progress in developing and strengthening a regional approach. Strategic and Local Development Plans should consider how prosperity can be spread across the region, how local economies can be

strengthened and how growth in the strongest economic areas can benefit the whole region. They should consider social, health and environmental inequalities and ensure that strategic land-use choices contribute to tackling these issues. Improving accessibility and the movement of people and goods is a key strategic priority and can support actions to address economic, social, cultural and environmental inequality.

Welsh language

There are more than 150,000 Welsh speakers across the region and the number is growing. It is important that development plans consider the relationship between strategic housing, transport and economic growth and the Welsh language.

An integrated, connected region

The South East region has traditionally had a high degree of integration, with the relationship between the cities, the Valleys and adjoining rural areas shaping the roles and functions of settlements in the region. The opportunity to build on these relationships and re-establish them where they have weakened, will allow issues that are difficult to address at the local level, to be considered collectively at the regional level.

A Strategic Development Plan will need to consider where people live, work, shop and spend their leisure time now and in the future and the location of the key health, education and social infrastructure they rely on. It should consider how the energy the region requires will be generated and transported; how waste will be managed; and the digital infrastructure required to support the region's communities. By focussing on improving accessibility and identifying the most sustainable locations, a strategic development plan should make clear choices on strategic locations and plan for the region as a cohesive whole.

Policy 31 – Growth in sustainable transit orientated settlements

P31

Development and growth in the region should be focussed in places with good active travel and public transport connectivity. Land in close proximity to existing and committed new mainline railway and Metro stations should be the focus for development.

Strategic and Local Development Plans should plan growth to maximise the potential opportunities arising from better regional connectivity.

The Welsh Government supports the development of the South Wales Metro and will work with agencies to enable its delivery.

Policy 32 – Cardiff Airport

P32

The Welsh Government supports the growth and development of Cardiff Airport.

Proposals to expand the capacity of the airport; to provide new and improved airport facilities and passenger services; and to improve transport links to the airport are supported. Improvements to accessibility are supported and should prioritise a modal shift from the private car to sustainable transport modes including public transport.

Development of land adjacent to Cardiff Airport which is part of the Enterprise Zone is supported where it supports the functions of the airport.

New development around the airport should be carefully managed to ensure future expansion and change at the airport is not constrained.

P31 The relatively high population density in South East Wales means the region is well-suited to Transit Orientated Development, as set out in P1. The quality, variety and frequency of transport services will vary across the region and should be taken into account by local planning authorities in the preparation of the regional settlement strategy, in accordance with P16.

The South Wales Metro scheme provides a major strategic opportunity to improve rail, bus, cycling and walking infrastructure across the region and provide a focus for investment, regeneration and associated development. Development plans must ensure that long term strategic decisions maximise opportunities in areas that will benefit from improved accessibility and investment in public transport, including from the Metro.

The Metro reflects the importance of Cardiff to the region but also provides potential and opportunity for other parts of the region to function as key centres. Merthyr Tydfil, Pontypridd, Caerphilly and Bridgend will be strategically important locations on the South

Wales Metro system. Regeneration and sustainable, inclusive economic growth in these towns will help deliver the ambitions of the Our Valleys, Our Future project. Where new transport corridors are created by the Metro scheme, the potential for these corridors to incorporate green infrastructure must be explored.

P32 Cardiff Airport is an essential part of Wales' strategic transport infrastructure. It is an international gateway, connecting Wales to the world, and is a key driver within the Welsh economy. Proposals to expand airport operations and improve connectivity and accessibility are essential to the airport's future success and its ability to compete with other UK regional airports. There are ambitious plans to grow Cardiff Airport's passenger numbers from 1.6 million passengers per annum to three million and beyond by 2040. Proposed growth in the airport's capacity will require new and improved airport facilities and passenger services.

Policy 33 – Valleys Regional Park P33

The Welsh Government supports the establishment of the Valleys Regional Park.

Strategic and Local Development Plans should embed its principles into their planning frameworks. The Welsh Government will work with local authorities, the third sector and key partners to support the Valleys Regional Park and maximise opportunities for new development.

The region is served by ports at Newport, Cardiff and Barry. Each plays an important economic role and collectively they are key infrastructure within the region. Development plans should consider the role of the ports locally, regionally and nationally and establish frameworks to support their operation and potential expansion. The Welsh Government will maintain its commitment to tackling congestion on the M4 and trunk road network including through its Pinch Point Programme of small scale interventions aimed at addressing congestion pinch points on the main road network.

Rivers and valleys

P33 The Welsh Government, communities and partners have developed a positive framework through ‘Our Valleys, Our Future’ to drive change and regeneration. The Valleys Regional Park seeks to maximise the social, economic and environmental potential of the Valleys’ natural and cultural heritage assets and it is important that the planning system supports its delivery.

The region’s concentration of population and its historic and future growth mean that it is a high consumer of materials and natural resources. It is vital the region makes the best use of material resources, promotes resource efficiency and is ambitious in supporting innovative ways of promoting a circular economy. The region is heavily dependent upon marine aggregates from the Bristol Channel and the Severn Estuary and minerals from this area serves both Welsh and English markets.

The relationship between the NDF's policies and the 'Outcomes' it sets out to achieve.

| OUTCOMES | P1 | P2 | P3 | P4 | P5 | P6 | P7 | P8 | P9 | P10 | P11 | P12 | P13 | P14 | P15 | P16 | P17 | P18 | P19 |
|--|----|----|----|----|----|----|----|----|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| A Wales where people live ... | | | | | | | | | | | | | | | | | | | |
| and work in connected, inclusive and healthy places | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● |
| in vibrant rural places with access to homes, jobs and services | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● |
| in distinctive regions that tackle health and socio-economic inequality through sustainable growth | ● | ● | ● | ● | ● | ● | | ● | | ● | ● | ● | ● | | | ● | ● | ● | ● |
| in places with a thriving Welsh Language | | | ● | ● | ● | ● | ● | | | | | | | | | ● | ● | ● | |
| and work in towns and cities which are a focus and springboard for sustainable growth | ● | ● | ● | ● | ● | ● | ● | ● | | | | | ● | ● | ● | ● | ● | ● | ● |
| in places where prosperity, innovation and culture are promoted | ● | ● | ● | ● | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | |
| in places where travel is sustainable | ● | ● | ● | ● | ● | | ● | | | | | | | | | ● | ● | ● | |
| in places with world-class digital infrastructure | | | | ● | | ● | | | | | | | | | | ● | ● | ● | |
| in places that sustainably manage their natural resources and reduce pollution | ● | ● | | ● | | | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | |
| in places with biodiverse, resilient and connected ecosystems | ● | | | ● | | | | ● | ● | ● | ● | ● | | | | ● | ● | ● | |
| in places which are decarbonised | ● | ● | | ● | | | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |

| OUTCOMES | P20 | P21 | P22 | P23 | P24 | P25 | P26 | P27 | P28 | P29 | P30 | P31 | P32 | P33 |
|--|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| A Wales where people live ... | | | | | | | | | | | | | | |
| and work in connected, inclusive and healthy places | | ● | | ● | ● | | ● | ● | ● | ● | ● | ● | | ● |
| in vibrant rural places with access to homes, jobs and services | ● | ● | ● | ● | ● | ● | | | | | ● | | | |
| in distinctive regions that tackle health and socio-economic inequality through sustainable growth | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| in places with a thriving Welsh Language | ● | | ● | ● | ● | | | ● | | | | | | |
| and work in towns and cities which are a focus and springboard for sustainable growth | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| in places where prosperity, innovation and culture are promoted | ● | ● | ● | ● | ● | ● | | ● | ● | | | | ● | ● |
| in places where travel is sustainable | | ● | | ● | ● | | ● | ● | ● | ● | ● | | | |
| in places with world-class digital infrastructure | | | | ● | ● | | | | ● | | | | | |
| in places that sustainably manage their natural resources and reduce pollution | | | ● | | | | | ● | ● | ● | | | | |
| in places with biodiverse, resilient and connected ecosystems | | | | | | | ● | | | | | | | ● |
| in places which are decarbonised | | ● | ● | ● | ● | | ● | ● | ● | | ● | ● | | |

