

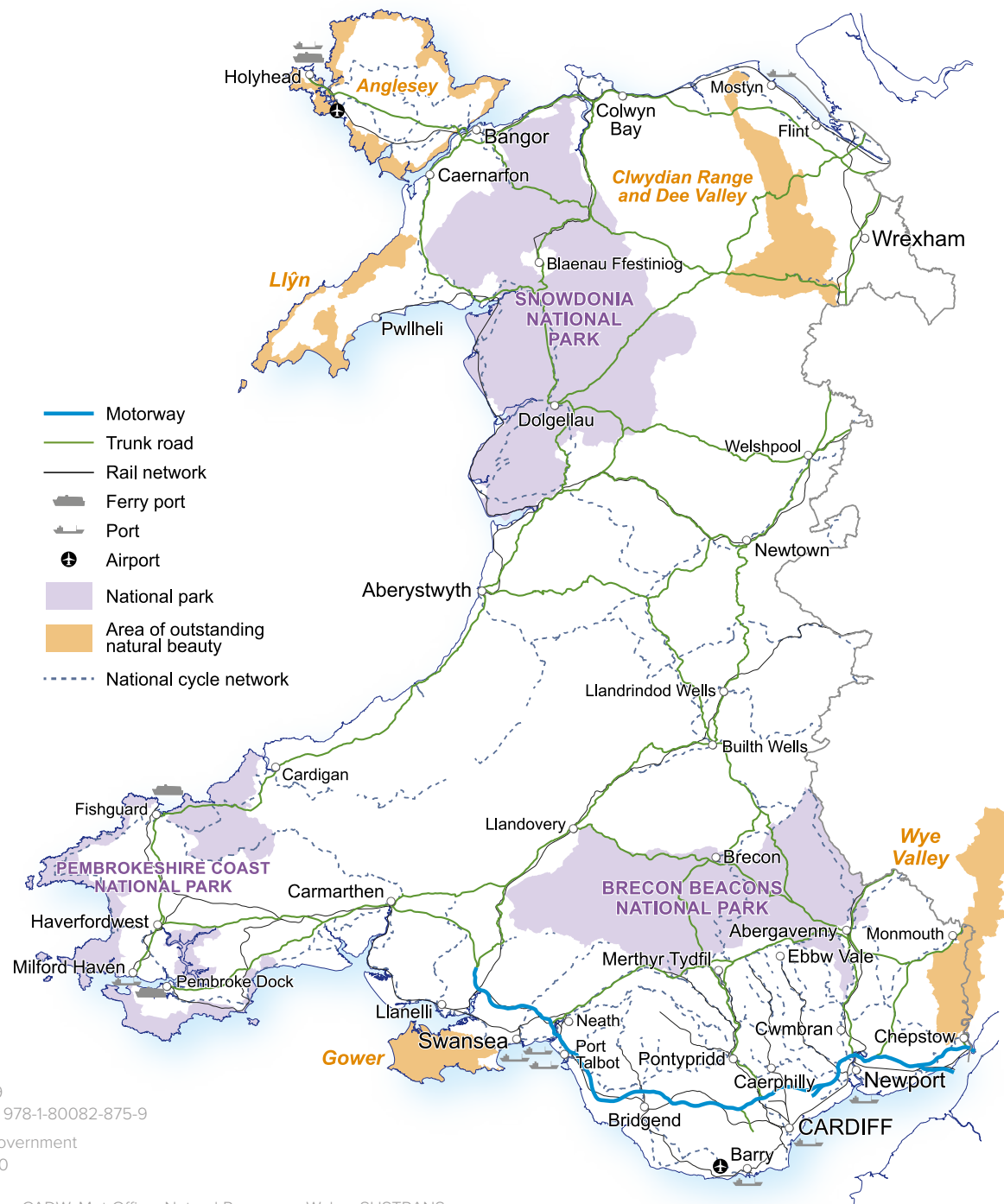
# FUTURE WALES

## The National Plan 2040



Llywodraeth Cymru  
Welsh Government





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# Foreword by Rt Hon Mark Drakeford MS, First Minister of Wales

It is my pleasure to present Future Wales – the first development plan of its kind in our nation’s history.

The next twenty years will be a critically important period as we emerge from the COVID-19 pandemic and face the challenges of global climate and biodiversity emergencies. During this time we will build many thousands of new homes, invest in our town centres and generate the energy we need to support our communities and industries. Future Wales will ensure we do so in a sustainable way that responds positively to the challenges we face.

By 2040, our population structures will change, the way we work and the places we live in will adapt, and the way we travel will have been transformed. Planning for these changes is challenging but also an exciting task, filled with opportunities to make Wales a better place – healthier, more resilient, more prosperous, more equal and more environmentally responsible. I am confident we have the people, resources and ambition to work together and build a better future.

For the past year our attention has focussed on the COVID-19 pandemic – the severest public health crisis of our lifetime. Amongst the tragedy has emerged a widespread understanding and appreciation of how important the places where we live are to our quality of life.

Good planning ensures the right development is put in the right place. This helps to create healthy, vibrant places with strong community spirit. It protects the natural environment and the historic environment. It means we can enjoy quality leisure time near our homes and benefit from more local job opportunities, avoiding spending hours on stressful commutes.

Future Wales is a plan promoting development that enhances our wellbeing and our quality of life. It is a framework to help us focus on achieving big ambitions when we develop and regenerate our cities, towns and villages. It won’t work in isolation – Future Wales empowers plans at the regional and local scales to identify schemes and projects that benefit our communities and help to achieve our national ambitions.

The publication of Future Wales is a major milestone in the ongoing development of a distinctively Welsh planning system. As a country, we understand our duty to be globally responsible and we also recognise equally that good development is a matter of local and community scale importance. Future Wales is a vital link between the two, and for the next twenty years it will enable us to make the right choices – and to put the right development in the right place.



*Mark Drakeford*

**Rt Hon Mark Drakeford MS**  
First Minister of Wales



# Foreword by Minister for Housing and Local Government

Welcome to *Future Wales – the National Plan 2040*.

Future Wales is a framework for planning the change and development our country will need over the next two decades. As recent experiences show, whilst there will certainly be challenges to face, there are also great opportunities we must seize.

The planning system has a key role to play in making Wales healthier, fairer and more prosperous. It shapes the places we live in, where we work, how we travel and the quality of the environment around us.

Future Wales positions our planning system to deliver a prosperous and fairer Wales where sustainable living and the efficient use of resources are the norm. We want to create places that support healthy and active lifestyles. By co-locating different land-uses we can minimise the amount of travelling we need to do to reach work, open spaces, shops and public services from our homes. Not only is this environmentally-sound planning, it offers great social, economic and cultural benefits too.

To achieve these benefits we have to put the strategic priorities and policies of this plan into practice. Implementing Future Wales is a collective responsibility – across the Welsh Government, for local authorities and the wider public sector, for businesses, developers and landowners, the third sector and the general public.

As Minister for Housing and Local Government I am determined to deliver social and affordable housing and town centre regeneration. More widely, this Government is committed to supporting and delivering more active travel and sustainable transport infrastructure, new renewable energy schemes, improved digital communications infrastructure and new public services and facilities. In all these areas our decisions can contribute towards decarbonisation, healthy and active lifestyles, a resilient and diverse environment and increased economic prosperity and fairness.

Whatever our role and however big or small our development, our responsibility to ourselves and our future generations is to contribute positively to the well-being of Wales. I am delighted to present Future Wales to help us achieve those ambitions.



*Julie James*

**Julie James MS**  
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 this document?

*Future Wales – the National Plan 2040* is our national development framework, setting the direction for development in Wales to 2040. It is a development plan with a strategy for addressing key national priorities through the planning system, including sustaining and developing a vibrant economy, achieving decarbonisation and climate-resilience, developing strong ecosystems and improving the health and well-being of our communities.

We face a climate emergency which is actively changing our environment and directly affecting communities; we have an ecological emergency, where the behaviours and decisions of the human race are causing harm to the resilience of ecosystems and species; we have suffered the effects of a global health pandemic and must re-energise our economy in a sustainable way, demonstrating that we have learnt from previous excesses that have resulted in inequitable wealth and access to services. The Welsh Government will face these challenges and find the opportunities for a better Wales with every mechanism at our disposal. Our national development framework, in this context, is an important lever to deliver the change we need.

*Future Wales* 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. *Future Wales* sets the challenge of delivering these improvements to the public, private and third sectors. It makes clear the importance of planning new infrastructure and development in such a way that 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. *Future Wales* provides leadership and strategic direction for taking these decisions.







As the national development framework, Future Wales is the highest tier of development plan and is focused on solutions to 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 at a regional level and Local Development Plans at local authority level. These plans will identify the location of new

infrastructure and development. Strategic and Local Development Plans are required to be in conformity with Future Wales and must be kept up to date to ensure they and Future Wales 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. Future Wales replaces the Wales Spatial Plan.

### Well-being of Future Generations (Wales) Act 2015 and Future Wales

The Well-being of Future Generations (Wales) Act 2015 ('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 Future Wales, 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 Future Wales. We have carefully considered how Future Wales reflects, aligns with and maximises its contribution to the well-being goals, objectives and ways of working.



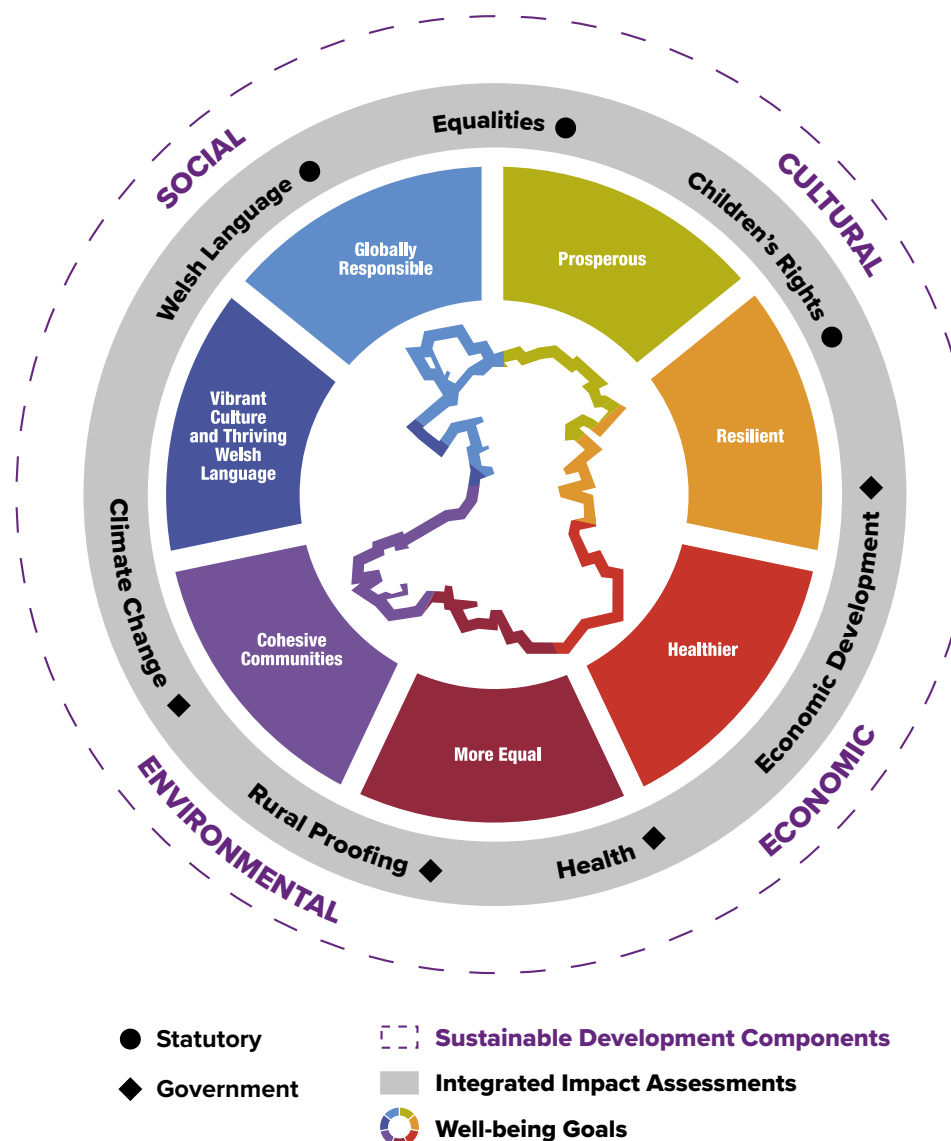


## Integrated Sustainability Appraisal

The approach taken to assess Future Wales follows the established and recognised approach of Strategic Environmental Assessment and Sustainability Appraisal, which has been broadened to integrate a number of other impact assessments, as illustrated in Figure A. The Well-being of Future Generations Act has been fundamental in the development of this approach. This has enabled the embedding of the principles of sustainable development at all stages and ensures we comply with our statutory requirements. We have involved and engaged stakeholders to support the plan, ensuring that a collaborative approach has been undertaken, sharing knowledge and recognising the links between topics. Ensuring effects are recognised at the earliest stage and engaging stakeholders throughout this process, seeks to ensure Future Wales is as sustainable as possible.

Figure A

## Integrated Impact Assessments



## Habitats Regulations Assessment of Future Wales

A Habitats Regulations Assessment is required where a plan or project has the potential to impact upon National Site Network sites (formerly known as Natura 2000 sites prior to the amendments made to the Habitats Regulations by the Conservation of Habitats and Species (Amendment) (EU Exit) Regulations 2019). In line with planning policy, we have included Ramsar sites in the Habitats Regulations Assessment. Planning Policy Wales and Technical Advice Note 5 also provide guidance in relation to National Site Network sites and Ramsar sites, including refusing development where there are adverse effects on the features for which a site has been designated. Specific mitigation measures have been developed within the Habitats Regulations Assessment which will provide a strong guide to lower-tier plans and projects (refer to table 6 and Appendix A of the Habitats Regulations Assessment report). Future Wales does not support lower-tier plans or projects where adverse effects on site integrity cannot be ruled out. Development at the lower-tier plan or project stage will need to demonstrate there are no adverse effects on the features for which a National Site Network site or Ramsar site has been designated, and where this is not concluded lower-tier plans or projects cannot be approved (unless there are no less damaging alternative solutions, Imperative Reasons of Overriding Public Interest (IROPI) and appropriate compensatory measures have been secured). The Welsh Government therefore expects the findings of the Habitats Regulations Assessment to be taken into consideration during the preparation and implementation of all Strategic and Local Development Plans. The Habitats Regulations Assessment concludes that, on the assumption that the findings of the Habitats Regulations Assessment are adopted at the lower-tier planning

or project scales, adverse effects on the integrity of National Site Network sites and Ramsar sites can be avoided as a result of implementing the policies within Future Wales.

## How does Future Wales fit with wider Welsh Government policy?

Future Wales is one of a number of documents concerned with infrastructure and development in Wales. The specific purpose of Future Wales is to ensure the planning system at all levels is consistent with, and supports the delivery of, Welsh Government strategic aims and policies.

The role of Future Wales is defined by legislation and by the Programme for Government – Prosperity for All: the national strategy. This states that it has an important role in driving sustainable growth and combating climate change by guiding strategic development over the next 20 years.

A number of Welsh Government strategies and policies have informed and helped shape Future Wales, including the Welsh National Marine Plan, the Transport Strategy, Prosperity for All: Economic Action Plan, Natural Resources Policy and the Low Carbon Wales plan. The relationship is two-way with Future Wales taking their strategic direction and providing a means of delivery and a framework for maximising the potential outcomes. As other documents are reviewed and updated they will reflect and take account of the spatial priorities identified in Future Wales.

The ambitions of this document reflect and address the main themes highlighted by the National Infrastructure Commission for Wales in 2019 in their first annual report. Future versions of Future Wales will benefit from the Commission's infrastructure assessments. Future Wales will be used to guide both public and private investment. Our aim is to ensure investments in infrastructure and development – whether large or small in scale – contribute to our broader ambitions of greater well-being and the creation of better places. We will lead the way with our own investments. Future



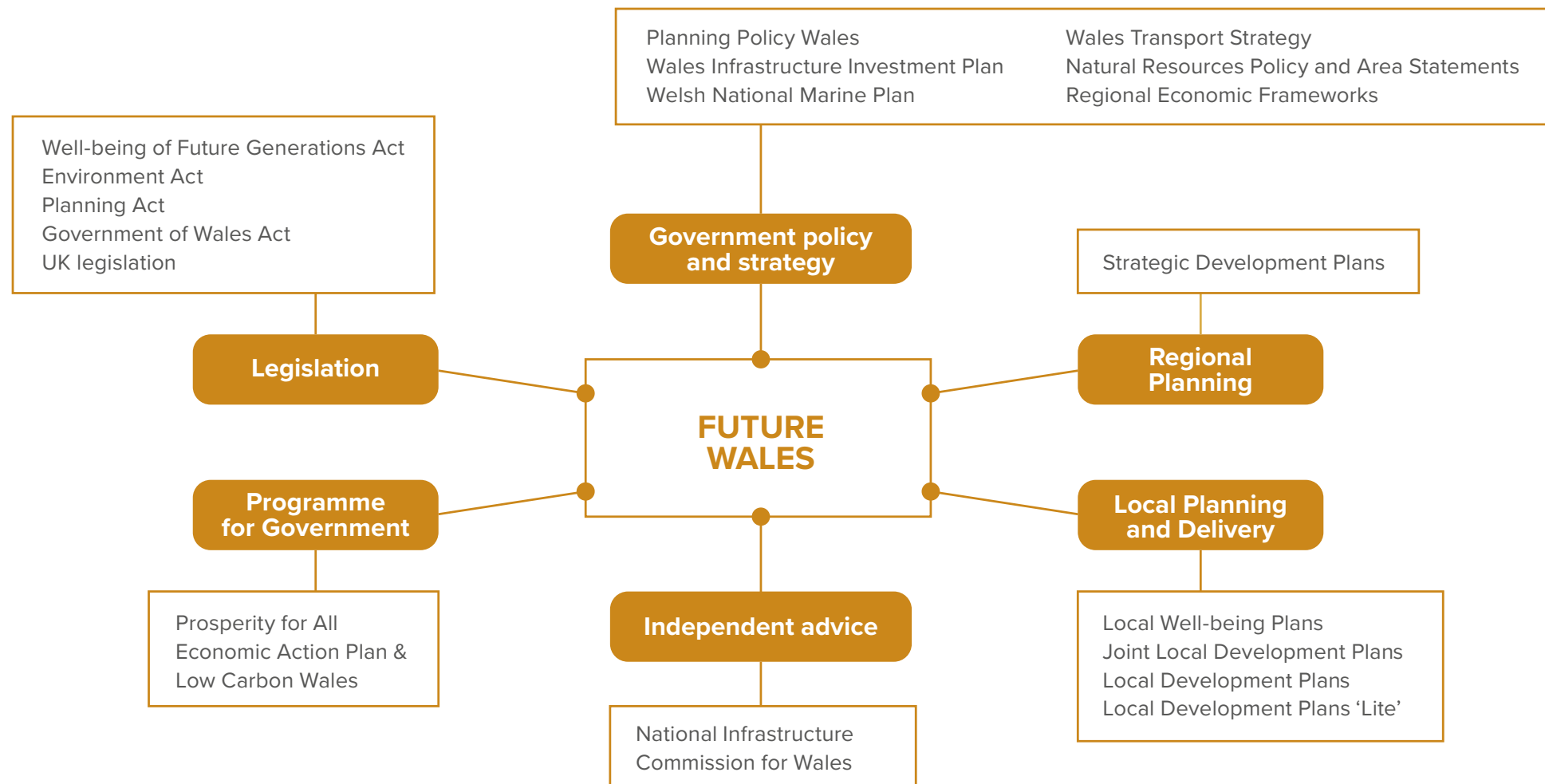
Wales will complement the Wales Infrastructure Investment Plan and Regional Economic Frameworks by enabling development that maximises the impacts of our investment. The scale of ambition for change outlined in Future Wales reflects the ability of the public sector to deliver new development. Future Wales' 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 Future Wales' spatial approach.





## Model of Future Wales Influence



# Future Wales and...

## Natural Resources Policy

The Natural Resources Policy identifies the key priorities, risks and opportunities to achieve the sustainable management of natural resources, including addressing the climate emergency and reversing biodiversity decline. Its objectives are to maintain and enhance the resilience of ecosystems and the benefits they provide. Planning Policy Wales outlines how the planning system should contribute towards these goals and Future Wales builds on this policy by setting out specific policies that:

- safeguard areas for the purposes of improving the resilience of ecological networks and ecosystems services, to identify areas for the provision of green infrastructure and to secure biodiversity enhancement (net benefit);
- ensure resilient location and design choices by promoting a sustainable growth strategy as well as ensuring the consideration of natural resources and health and well-being form part of site and design choices; and
- facilitate the decarbonisation of the economy, including energy and transport choices, and promote the principles of a circular economy.

## Welsh National Marine Plan

The Welsh National Marine Plan is the first of its kind 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 Marine Plan has informed the preparation of Future Wales and, where relevant, it should inform Strategic and Local Development Plans and planning decisions. The timescales for the production of the Marine Plan and Future Wales have overlapped, enabling the production of both plans to be joined up. This link will continue as both plans are implemented and reviewed.

Future Wales and the 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.

## Wales Transport Strategy

The Wales Transport Strategy provides the framework for transport related activities and sets out the strategic priorities of a safe, integrated, sustainable, efficient and economic transport system serving Wales. It provides the context for the Welsh Government's aim to reduce the need to travel, particularly by private car, and supports a modal shift to walking, cycling and public transport. This is reflected in Planning Policy Wales and Future Wales, which put placemaking at the heart of the planning system. This modal shift is supported by the sustainable transport hierarchy, which prioritises walking, cycling and public transport.

The current Wales Transport Strategy, One Wales: Connecting the Nation, was published in 2008. Since then the Active Travel (Wales) Act 2013 has been introduced, which is increasingly influential in the way we integrate active travel with new development. This is essential to enable people to walk and cycle as part of their everyday activities. Metro schemes are also being developed in the

South East, South West and the North, which are being driven by significant investment from the Welsh Government and its delivery partners. The metro projects will provide significant opportunities for communities and new development to be supported by good quality public transport. Transport technologies have also advanced significantly in recent years, with ultra-low emission vehicles capable of having a transformative effect on the decarbonisation of transport.

The Wales Transport Strategy, Llwybr Newydd, will recognise these changes and set out our long-term vision for transport. Llwybr Newydd, along with the associated transport policies and projects, have directly contributed to the spatial strategy, outcomes and policies of Future Wales.

### **Economic Action Plan**

The Economic Action Plan supports the delivery of Prosperity for All – the national strategy for Wales. It sets out a vision for inclusive growth based on strong foundations, future industries and productive regions. It aims to build resilience and future proof the economy. The Plan focuses funding support on businesses which align with decarbonisation objectives, are innovative and entrepreneurial, seek to export and import, support skills development and high quality employment, and support automation, research and development and digitalisation. The Plan identifies national thematic sectors and foundational sectors. Thematic sectors include high value manufacturing, tradable services (e.g. sale of online services), and enablers (key competitiveness drivers e.g. digital or renewable sectors). Whilst foundation sectors include tourism, food, retail and care. The Plan also introduces a new regionally focused model of economic development.

Future Wales supports and helps deliver the aims of the Economic Action Plan. Future Wales:

- supports a low carbon economy and the decarbonisation of industry, and the growth of sustainable and renewable energy
- supports the sustainable location of economic land uses
- supports the growth of innovation, research and development, and better linkages between higher education and private industry
- supports the development of advanced manufacturing in each region
- recognises the importance of key future sectors such as advanced engineering, renewable technologies, Artificial Intelligence, transport, automation and digital innovation
- supports the foundational economy and identifies a regional and sub-regional approach to economic development delivered through Strategic Development Plans and Local Development Plans
- supports infrastructure development, including transport, energy, and digital communications.



## The structure of the Welsh planning system

### A plan-led system

Our planning system is development plan led. Development plans are prepared at national, regional and local scales, with the three tiers together in combination comprising ‘the development plan’. The Welsh Government by producing Future Wales contributes the national tier of the development plan. This is the highest tier of development plan. Strategic Development Plans cover regional and sub-regional scales and Local Development Plans consider issues at the local scale.

The three tiers of the development plan should be aligned and complement each other. Strategic Development Plans, which have not yet been prepared in any region, are required to be in conformity with Future Wales. Similarly, Local Development Plans must be in conformity with Future Wales and the Strategic Development Plan for their area. Strategic and Local Development Plans must be kept up to date to ensure they and Future Wales 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.

Future Wales and its spatial strategy has been prepared in the context of the three tiered development plan system. Future Wales does not seek to take decisions that are most appropriately taken at the regional or local level. It provides strategic direction for all scales of planning and sets out policies and key issues to be taken forward at the regional scale. It does not seek to identify the exact location for new development or the scale of growth in individual settlements. The regional and local tiers are the most appropriate level at which to take these decisions, involving communities as they do so.

### Planning Policy and the Development Plan

The content and policies of all three tiers of the development plan are strongly influenced by Planning Policy Wales. This is the complete land use planning policy document for Wales. It contains policy statements on all main land uses and is therefore the foundation of all national, regional and local planning policies.

The land use policies set out in Planning Policy Wales do not need to be addressed by every tier of the development plan; some issues have Wales-wide connotations while other matters should be addressed at a regional and local scale. Every authority preparing a development plan is responsible for considering which elements of Planning Policy Wales need to be addressed within their tier of the development plan. Some policies in Planning Policy Wales are not spatial; these do not need to be repeated in development plans.

Future Wales does not contain statements on all land use planning issues set out in Planning Policy Wales. It has policies on issues where the Welsh Government considers them a national priority at this time, or matters which are distinctly spatial and require national leadership. For example, we believe affordable housing is currently a critically important issue in all parts of Wales, while deciding where to locate renewable energy generation technology is a spatial issue of such significance that national ambitions are unlikely to be achieved without national planning policies.

Figure B: illustrates how different tiers of the development plan cumulatively address issues contained in Planning Policy Wales



**Development Plans** apply the key principles of PPW to their plan areas and are shaped by evidence. Development plans establish **WHERE** new development should take place over the next 15 to 20 years. They are how we decide how places should grow and change.

Development plans are prepared at different scales:



The **Development Management** process assesses and determines individual planning applications of all sizes in accordance with development plans. The vast majority are determined by Local Authorities and National Parks. Nationally significant planning applications are determined directly by the Welsh Government.

## Planning policy and development plans – weight in decision-making

Decisions on planning applications must be taken in accordance with the development plan. Planning Policy Wales is not part of the development plan, but as the principal statement of national planning policy it has substantial weight in the planning process. Development plans must be consistent with national policy, and if a development plan is absent or has lapsed, these national policies assume significant weight in the planning decision-making process; this means Planning Policy Wales is a ‘material consideration’. Development plans are tested to ensure they are consistent with Planning Policy Wales.

To help show the link with national planning policy, every Future Wales policy is cross-referenced against relevant parts of Planning Policy Wales, using icons to indicate key chapters and references to specific sections. Both Planning Policy Wales and Future Wales should be considered in their entirety. The cross-references help identify links between both documents but they are not the only links and the relationship between Planning Policy Wales and Future Wales can be wider than those identified.



### Strategic and Spatial Choices

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### Active and Social Places

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### Productive & Enterprising Places

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### Distinctive and Natural Places



**Hover over this symbol for a specific cross-reference to Planning Policy Wales to find the specific paragraph.**

## Document Structure

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



This chapter explains the purpose of Future Wales and how it fits within wider Welsh Government policy objectives. Key challenges and opportunities facing Wales over the next 20 years are highlighted in Chapter 2. Chapter 2 also introduces the four regions of Wales:

### **The North, Mid Wales, The South West, The South East**

The challenges and opportunities inform Future Wales' 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. Chapter 3 also explains how the impact of Future Wales will be measured and assessed.

A spatial strategy is presented in Chapter 4. The strategy focuses on the main areas of change where the planning system at a national scale will focus to achieve Future Wales' 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 urban and rural development, affordable housing, transport, digital communications, ecological networks and low-carbon energy.

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





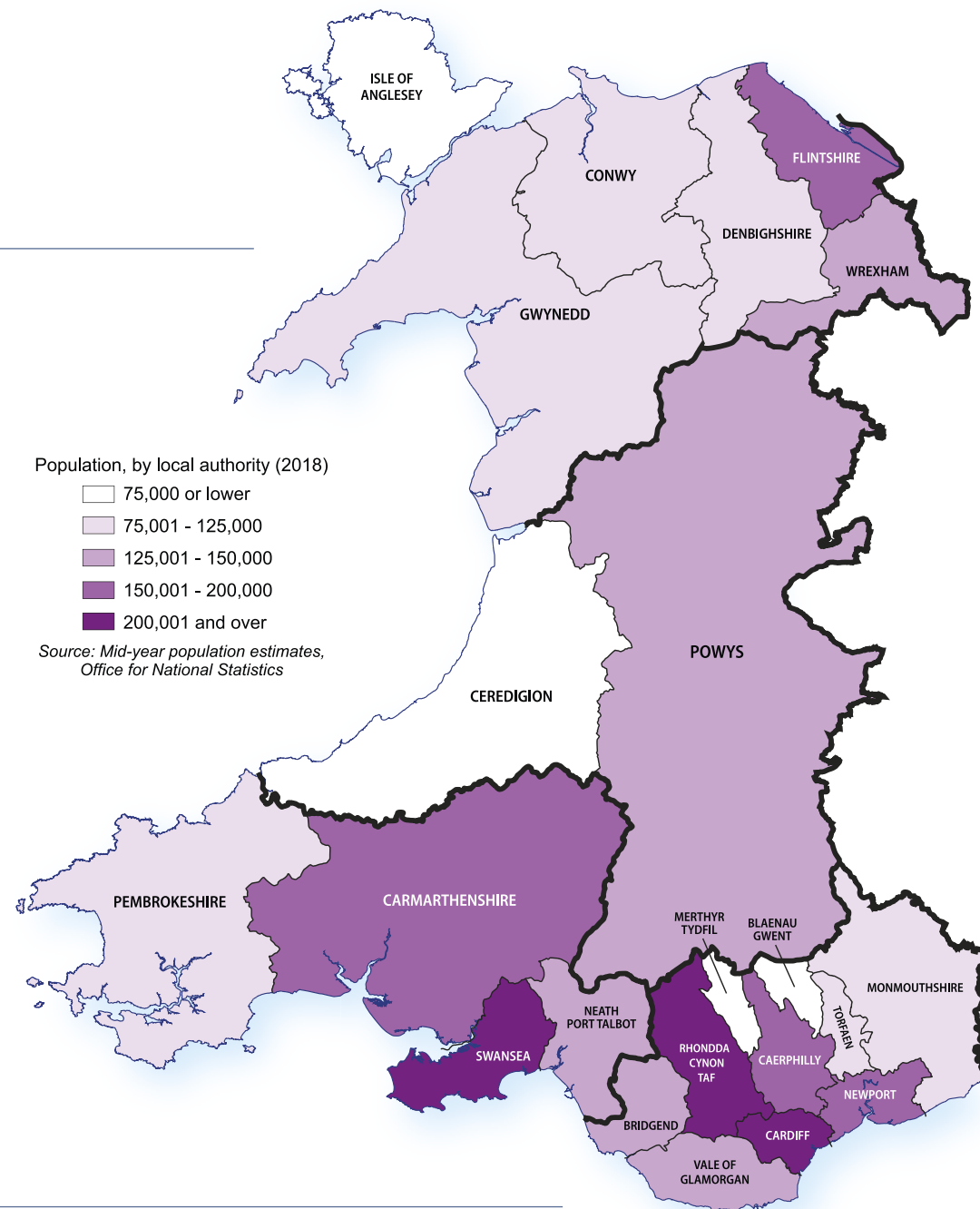


# 2 Wales: An Overview

**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.**

## Our Population

We are a nation of over 3 million people, whose population has grown by 8% between 1997 and 2017 and is projected to rise by a further 3.7% by 2043. 698,400 people live in the six local authority areas in the north, 205,000 in the two local authority areas in mid Wales and 2,232,000 in the 14 local authority areas across the south.



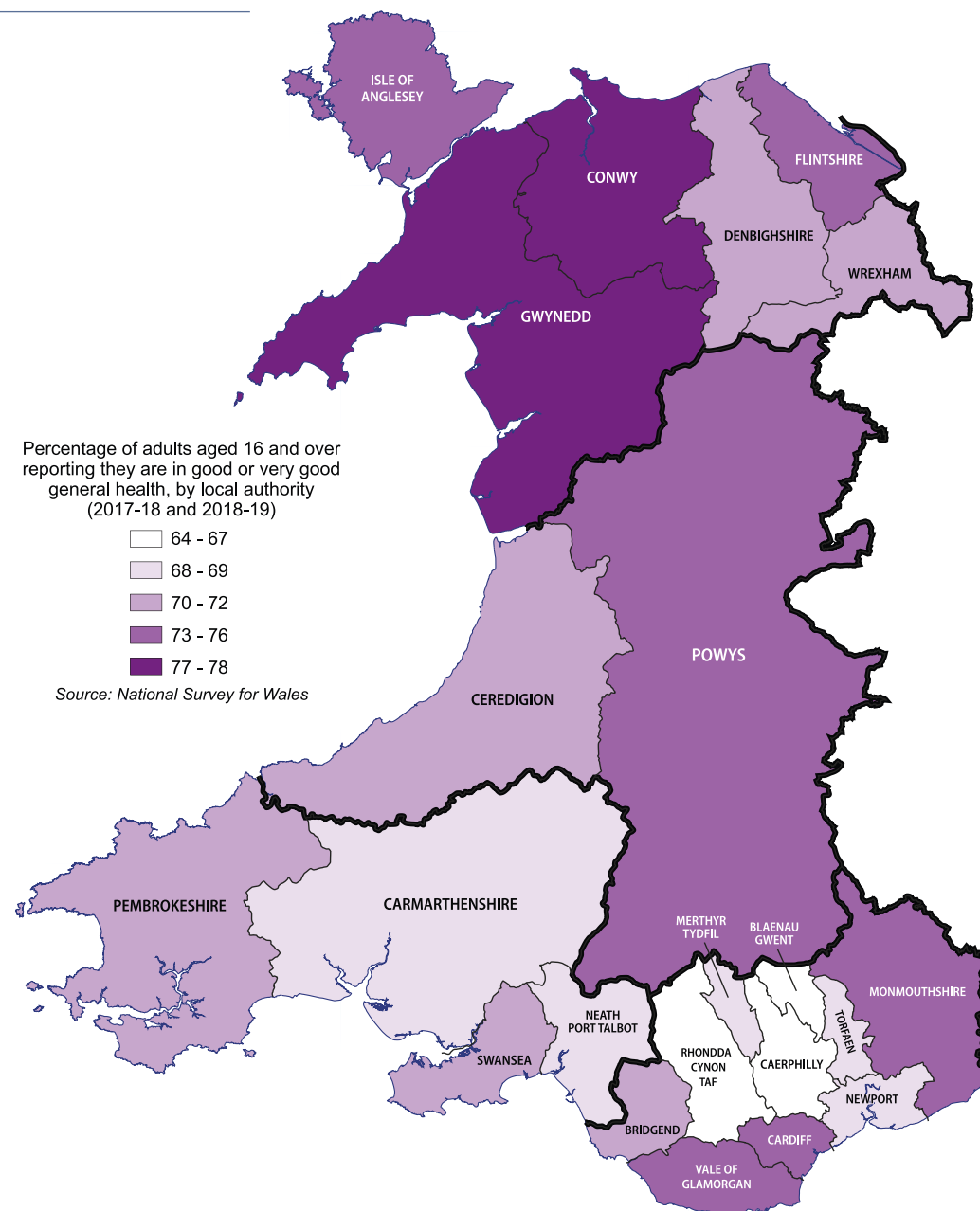
We are an ageing nation. Between 1998 and 2018, the proportion of the population aged 65 and over increased from 17.4% to 20.8% and the proportion of the population aged 15 and under fell from 20.6% to 17.9%. We will have 30.6% more people aged 65 and over, and 64.9% more people aged 75 and over by 2043.

### Population distribution in Wales by age and gender, 2018



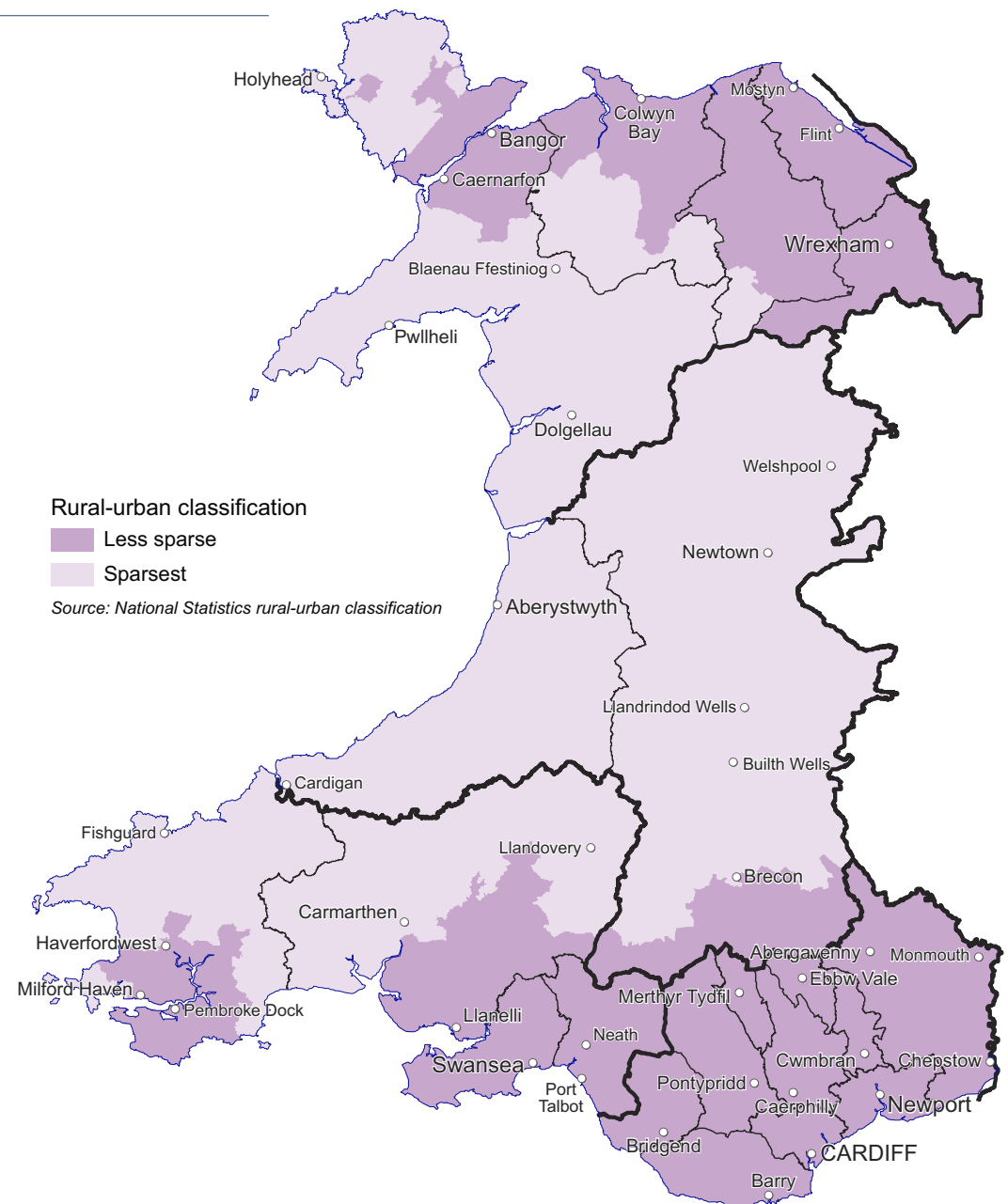
## Our Health

We are living longer but life expectancy is below the UK as a whole. People born in Wales in 2016-18 have a life expectancy of 82.3 years for females and 78.3 years for males compared to 82.9 years for females and 79.3 years for males for the UK as a whole. General health reporting shows pronounced spatial differences across Wales, with Gwynedd reporting the highest rates of good or very good general health and Blaenau Gwent the lowest.



## Built Up Areas and Settlements in Wales

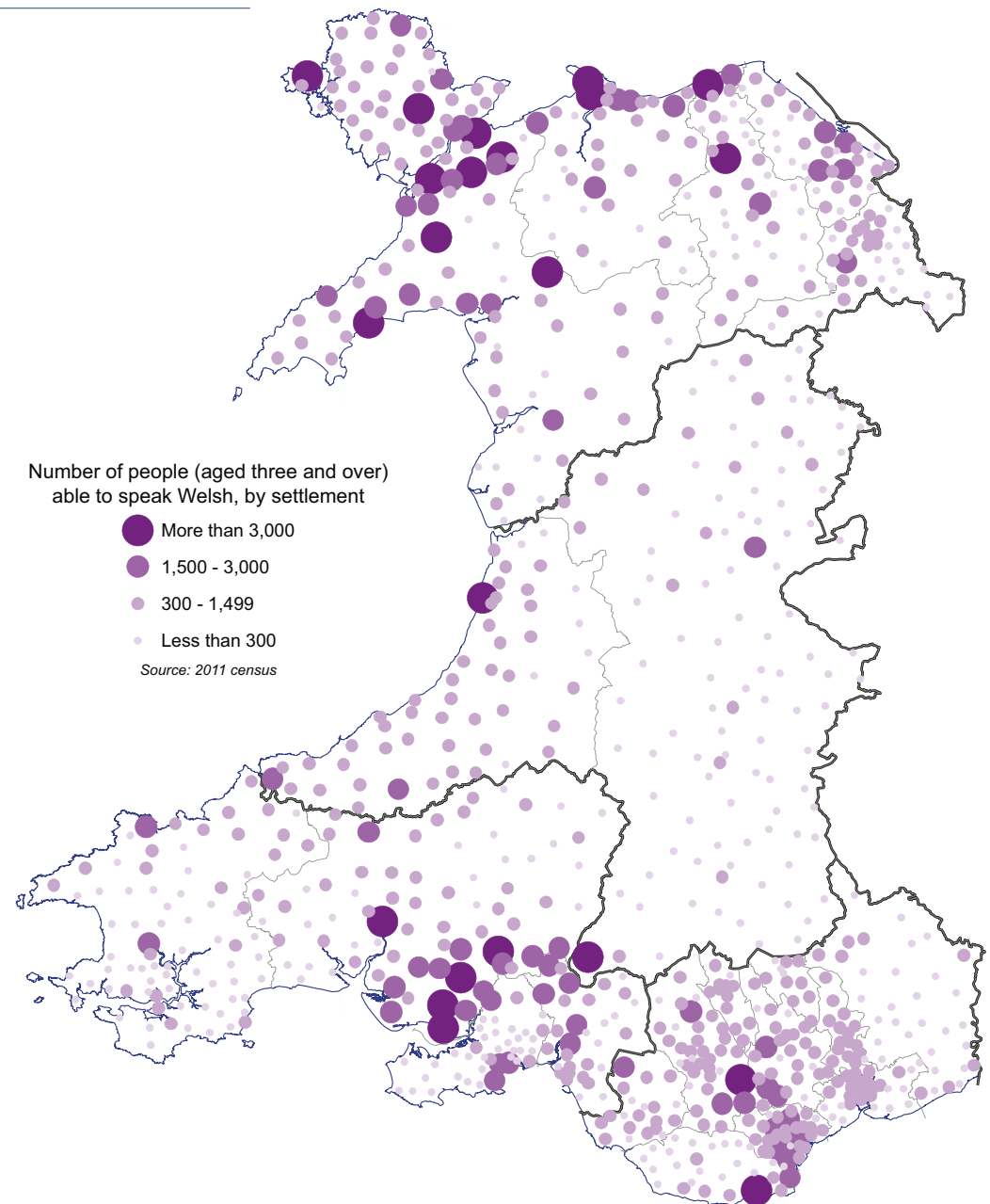
Communities are spread across the whole of Wales. The mid and western areas of Wales are more sparsely populated and rural in character, the southern and northern areas less sparse and more urban.





## Welsh Language

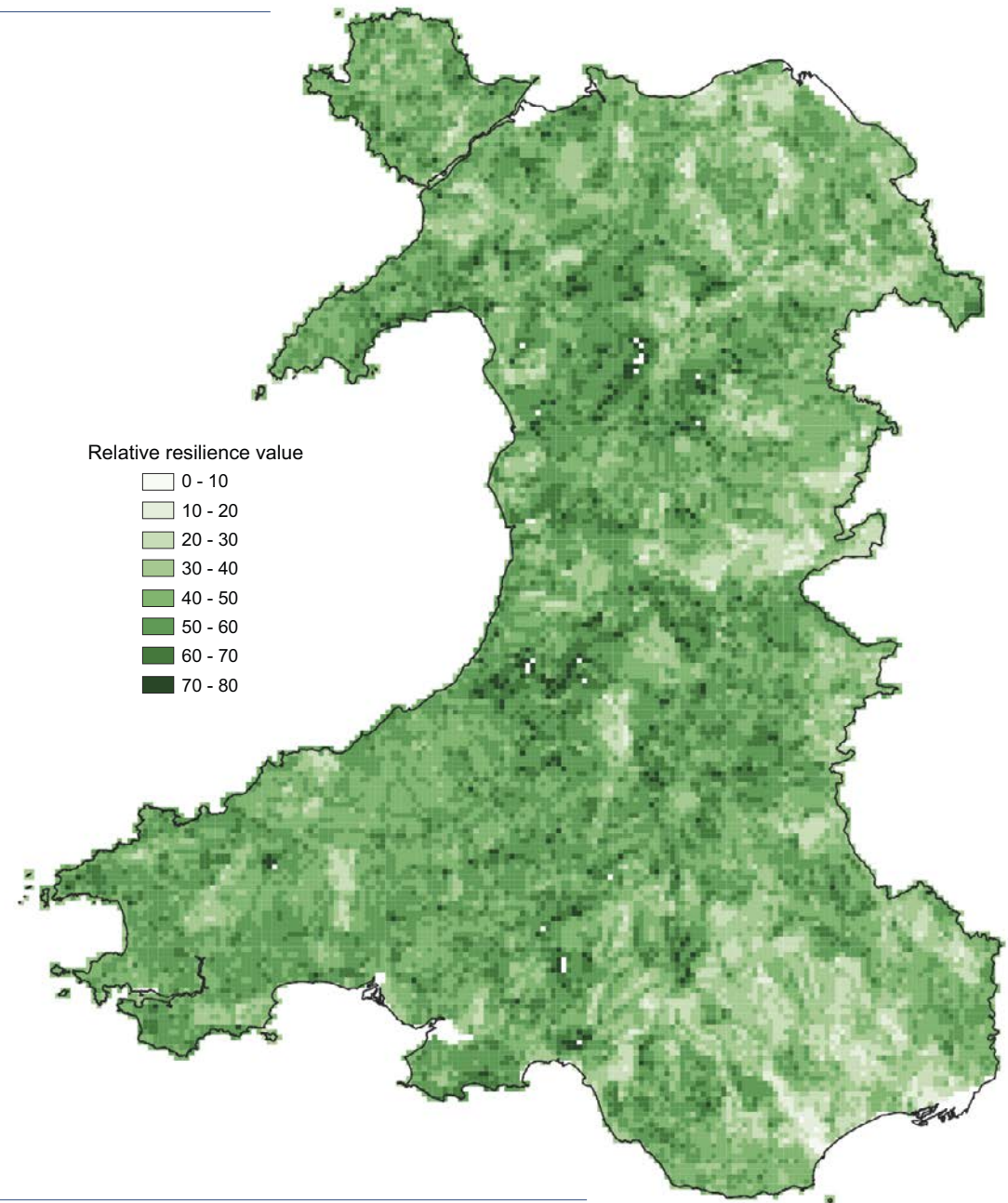
Welsh is a living language, with over 562,000 speakers across all parts of the nation. Our ambition for the Welsh language is to reach a million Welsh speakers, as well as increasing the percentage of people who speak Welsh daily by 10% by 2050.



## Resilient Ecological Connectivity

We are committed to living within our means, using only our share of the planet's resources and using them efficiently. Natural resources and resilient biodiversity and ecosystems support our well-being and prosperity. They have shaped our past and will shape our future.

This map indicates broad areas where nationally important ecological networks may exist. It gives an indication of the connectivity of ecological networks at a strategic scale where connectivity across a range of habitats and between biodiversity hotspots provides a potential indication of ecosystem resilience. Darker areas have most resilience and lighter areas have least resilience.



# Our Mineral Resources

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 must carefully manage the use of our natural resources and ensure that through a strong circular economy, we maximise their use and contribution to society.

## National Mineral Resources Map

### Superficial resources

- Sub-alluvial sand and gravel
- River terrace sand and gravel
- Glaciofluvial sand and gravel
- Glacigenic, poorly sorted and locally clayey sand and gravel
- Blown sand, sand and gravel
- Tidal flat sand and gravel
- Peat, generally more than 1 metre thick

### Bedrock resources

- Dolerite intrusions with potential for high specification aggregate
- Other igneous rocks including basalts, felsites, gabbros, tuffs and granites
- Sandstone with potential for high specification aggregate
- Quartzitic sandstone with potential for silica sand and silica rock
- Other sandstone
- Sandstone and conglomerate beneath overburden less than 10 metres
- High purity limestone (>97% CaCO<sub>3</sub>): carboniferous
- Limestone other carboniferous
- Other limestone
- Slate
- Brick clay
- Brick clay beneath overburden less than 5 metres
- Salt (wet-rockhead)

### Slate waste resources

- Slate waste

### Mudstone and sandstone resources

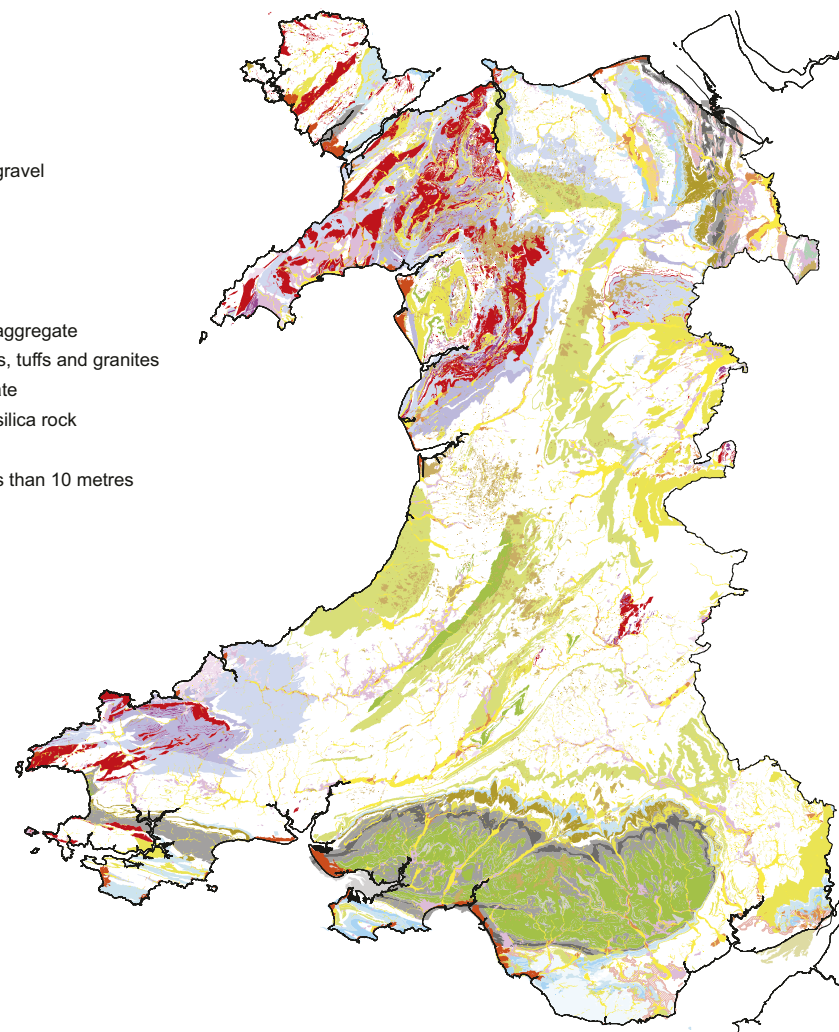
- Interbedded sandstones and mudstones

### Mudstone and slate resources

- Potential slate resource with recorded workings

### Coal resources

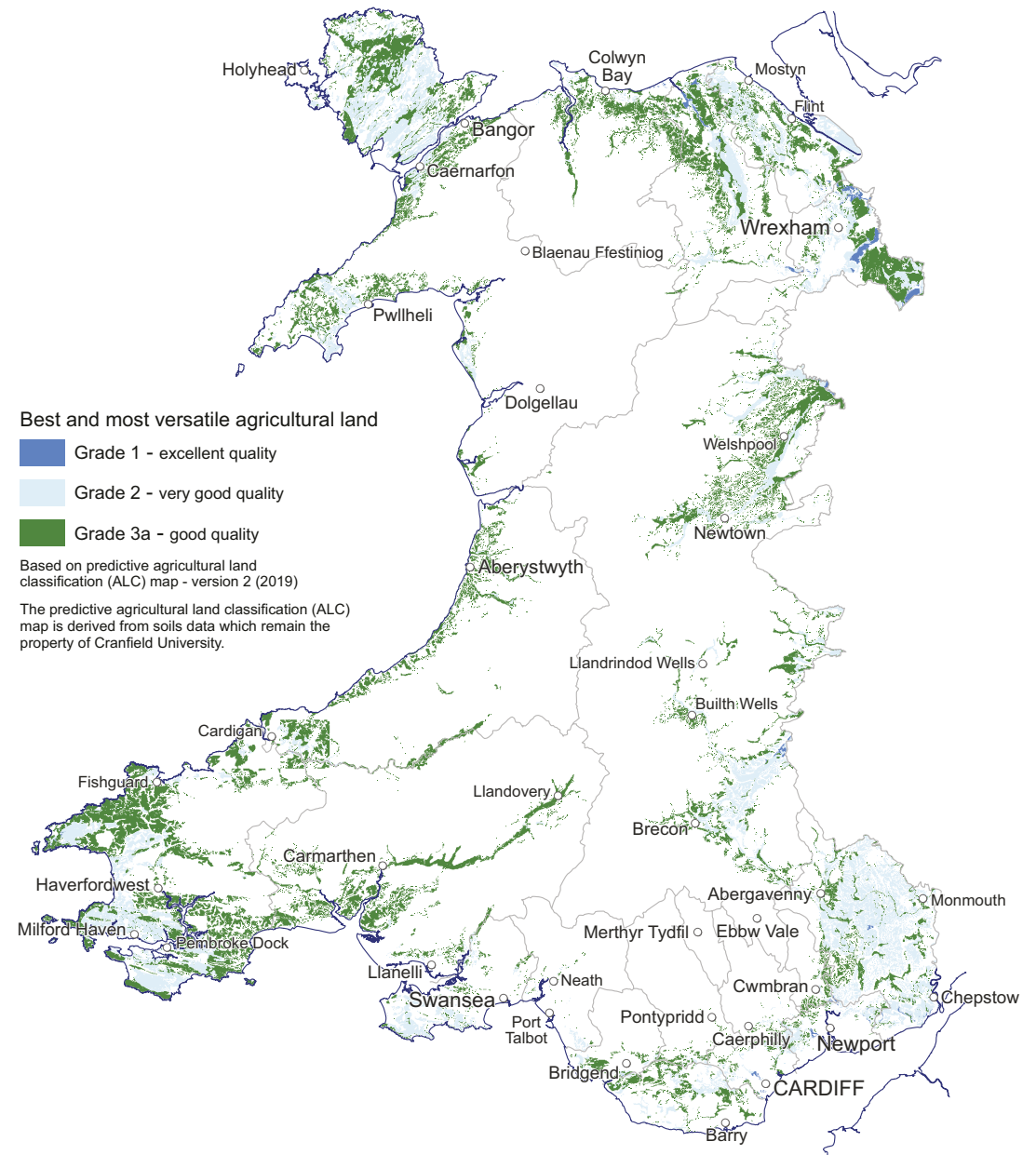
- Primary shallow coal resource
- Secondary shallow coal resource
- Tertiary shallow coal resource





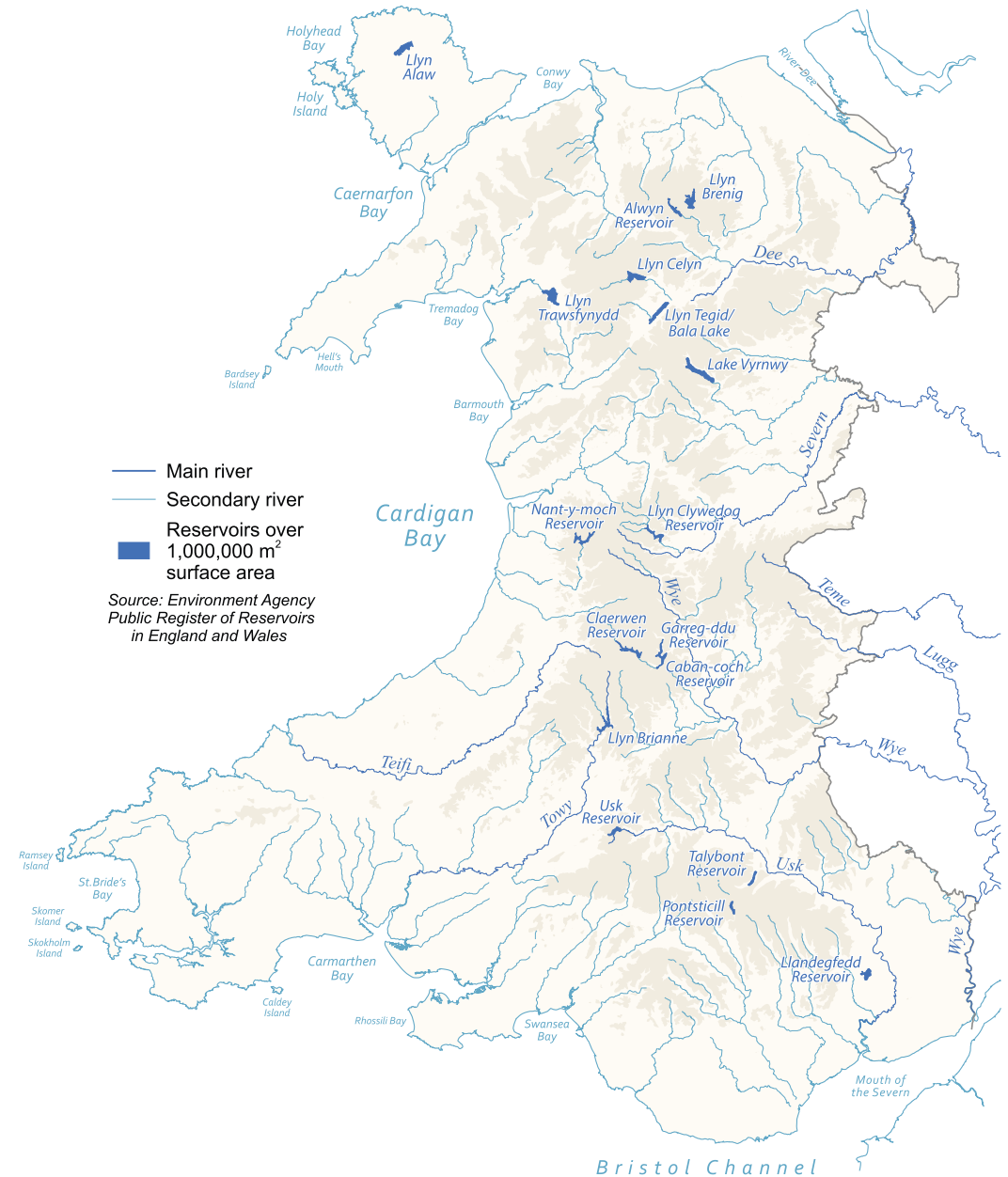
# Agriculture

Our productive land is a vital resource. Agriculture has shaped our landscapes and supported our rural and market towns for generations. We must continue to value and protect our agricultural land and ensure it can feed and support us.



## Our Water Resources

Our climate and geography ensure we are supplied with and are able to collect and manage our water resources. As our climate changes, we will need to ensure that we use and manage our resources efficiently.



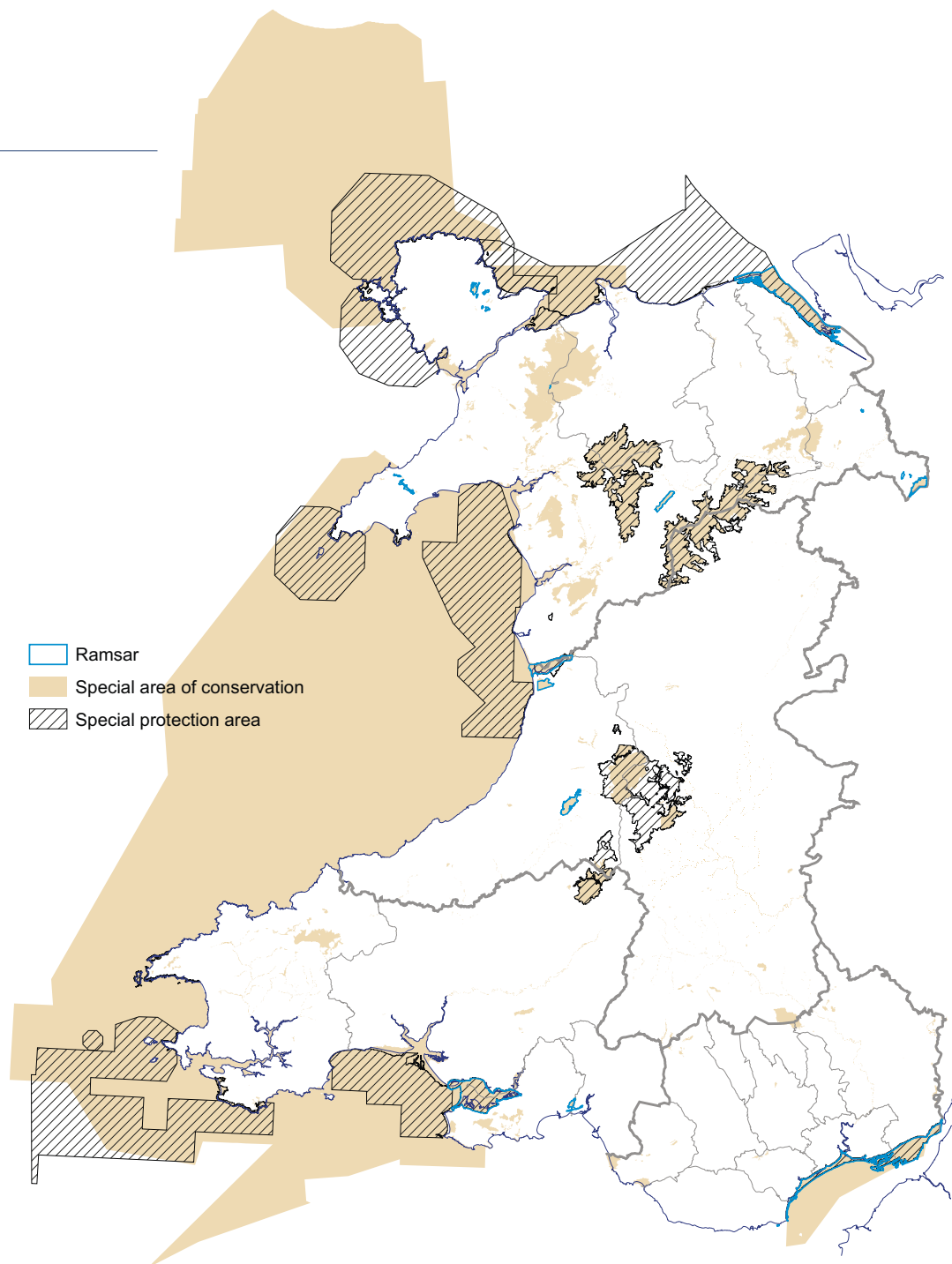






## Our Natural Environment

We have numerous designations for our natural environment throughout our land and seas. These are important sites and networks for habitats and species, from the local to the international scale. We must ensure they are protected and enhanced now and for future generations.

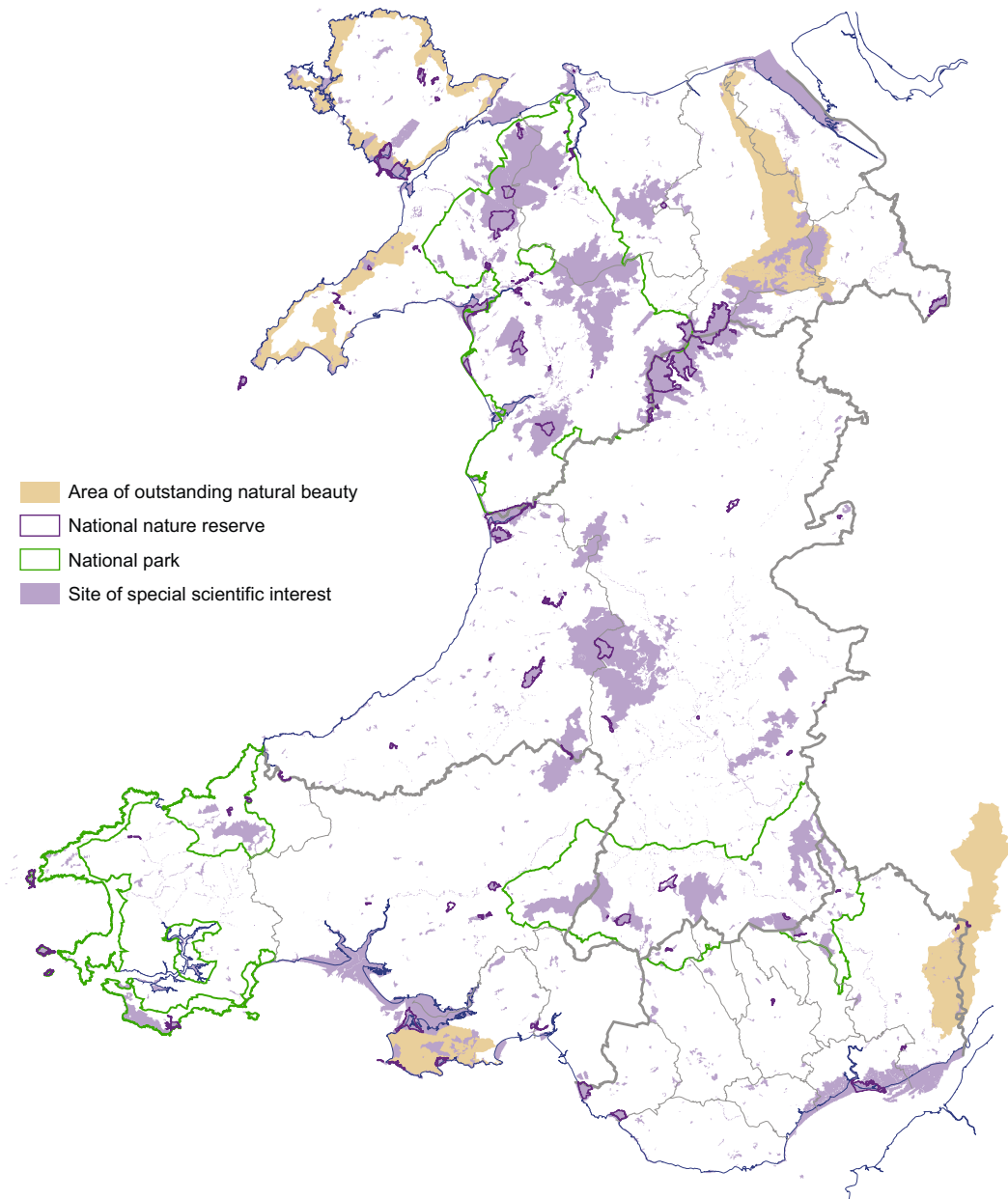




## Our Nature and Landscapes

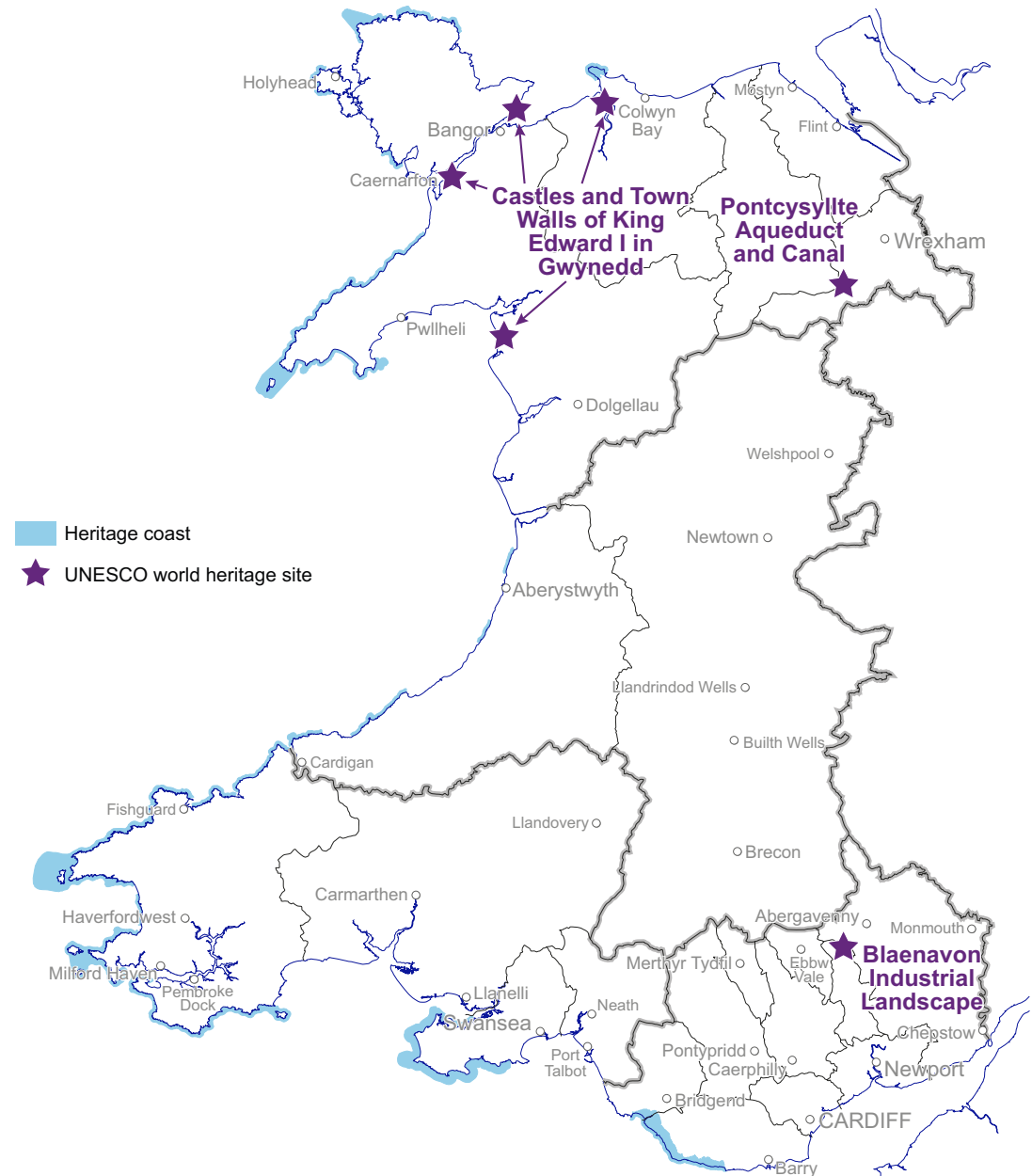
Our landscapes are amongst the best in the world and tell the story of our nation from volcanoes, glaciers, mountains and river valleys to castles, farms, industrial heritage and ports.

A quarter of our country is covered by our three national parks and five areas of outstanding natural beauty.



## Our Heritage

We have a number of World Heritage Sites and our coast on three sides connects communities and people to the sea.



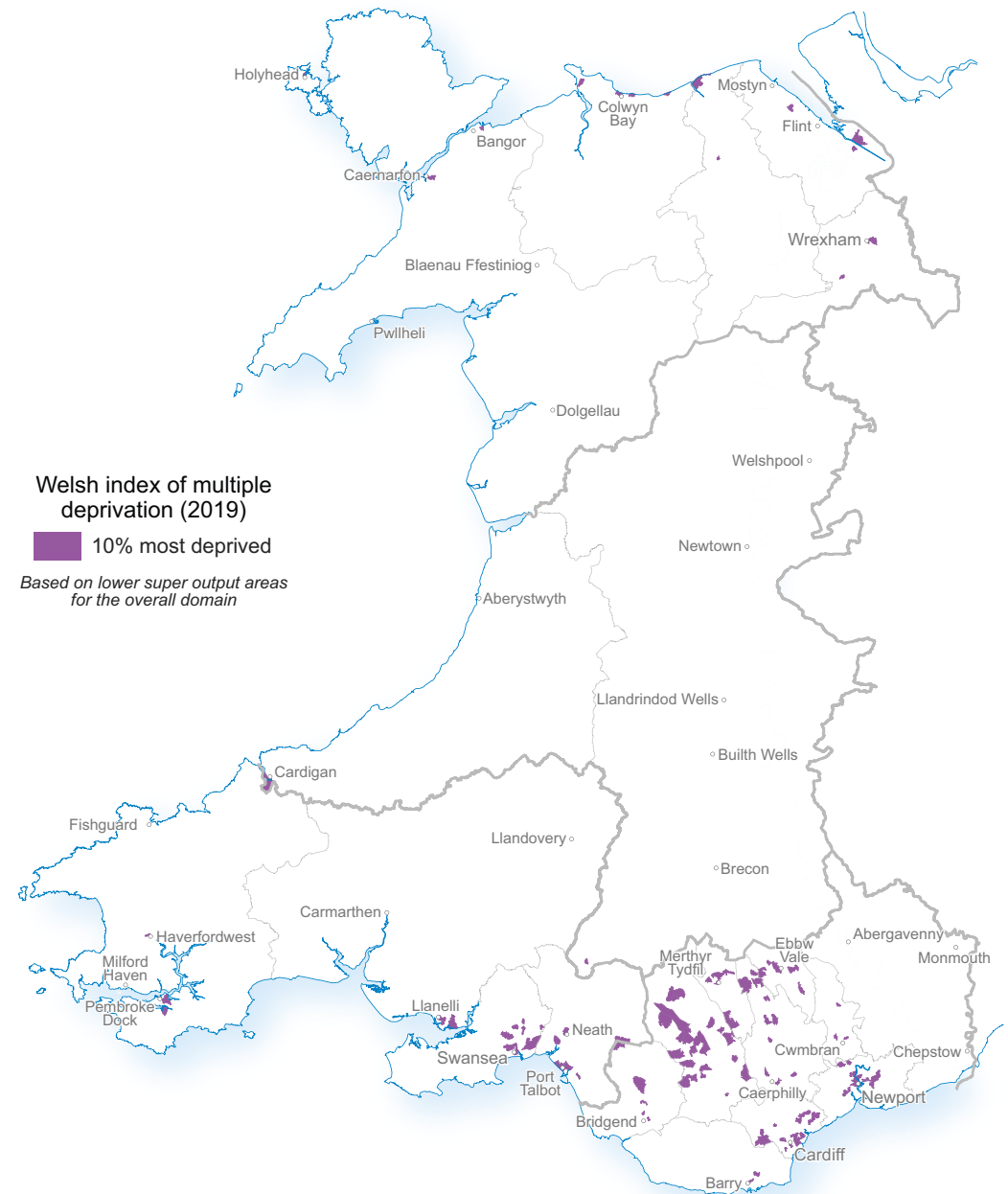






## Our Economy

Our economy changed profoundly in the late 20th Century and will change again through the 21st. Wales' main population centres in the south and north 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.

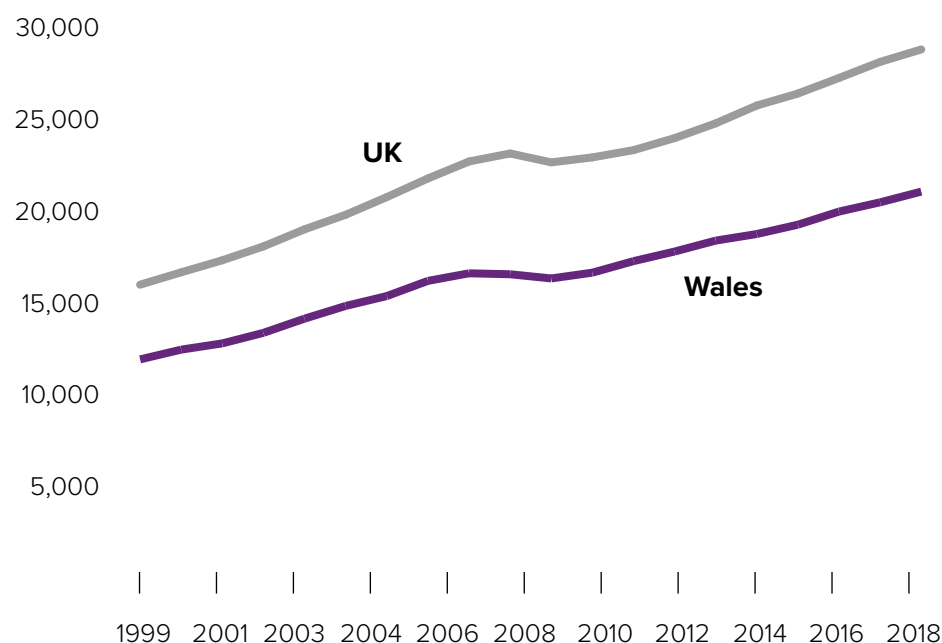




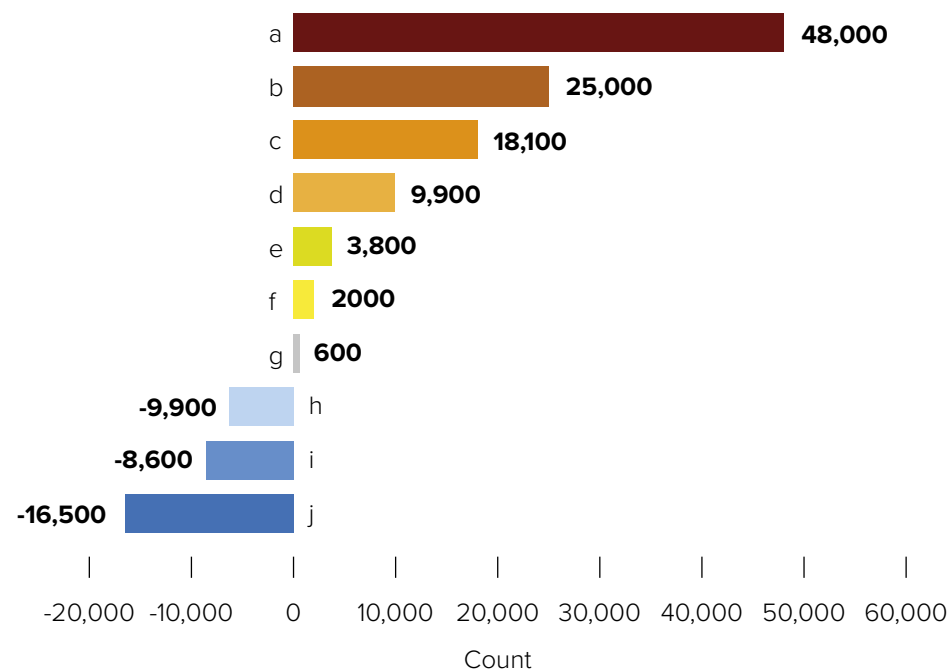
Despite steady improvements, economic activity, wages and productivity in Wales are lower than the UK average.

Our economy now is more service-based. The fastest-growing sectors between 2008 and 2018 were Professional, scientific and technical services, administrative and support duties; and Public administration, defence, education and health.

### GVA per head in Wales and the UK (£) 1998–2018



### Change in workplace employment in Wales by sector (count), 2008–2018

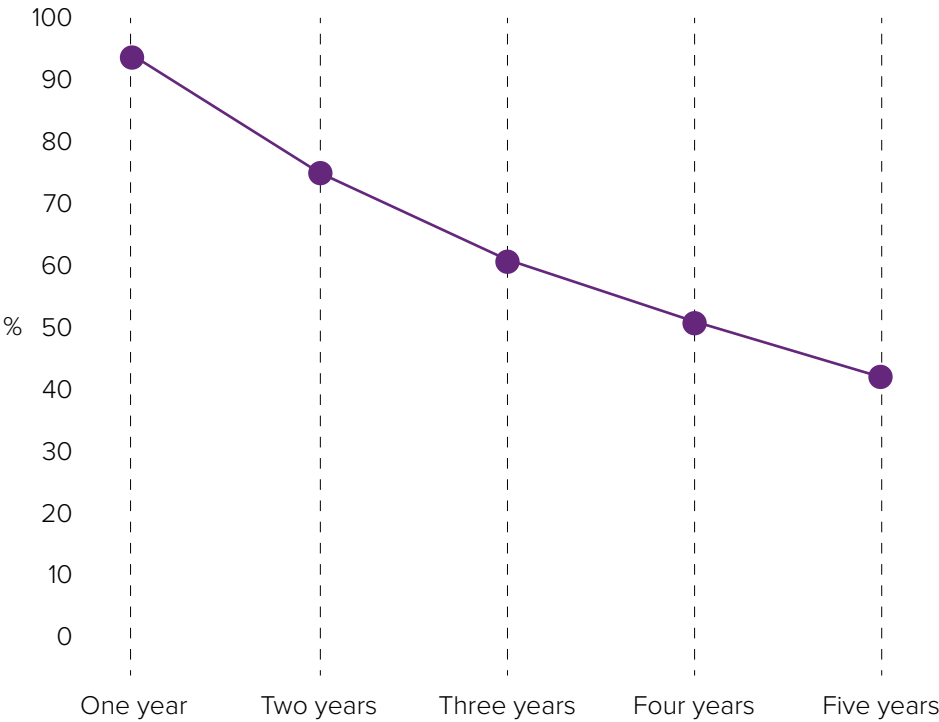


- a Professional, scientific and technical activities; administrative and support service activities
- b Public administration, defence, education and health
- c Wholesale, retail, transport, hotels and food
- d Other service activities
- e Real estate activities
- f Information and communication
- g Agriculture, forestry and fishing
- h Finance and insurance activities
- i Construction
- j Production

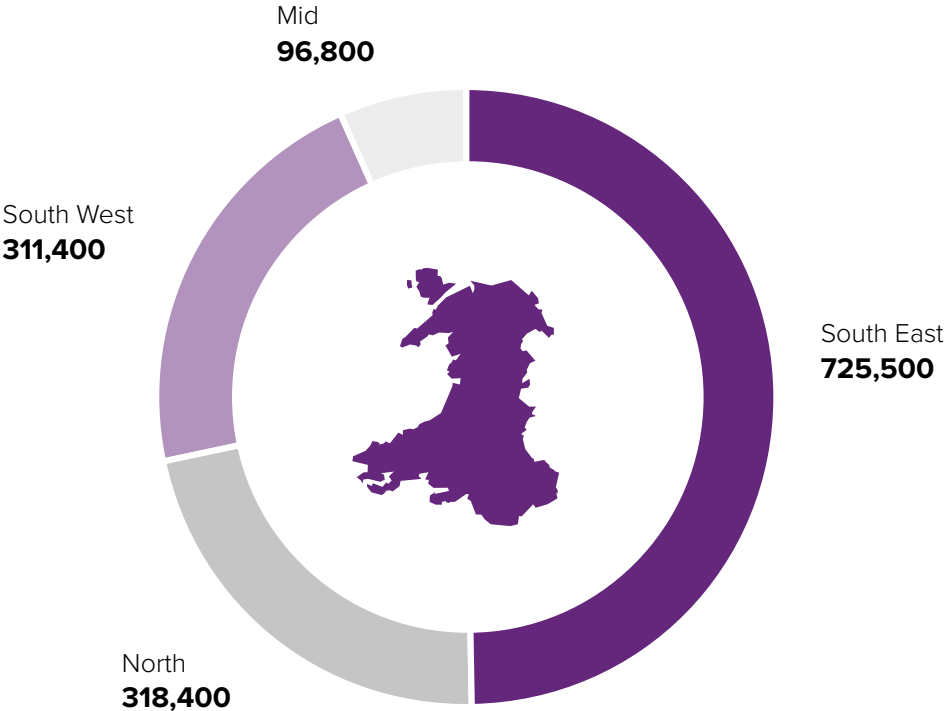
Small and medium sized enterprises are an important part of our economy and grew more in Wales in 2018 than within the UK as a whole. There were 14,045 enterprise births in Wales in 2018, giving it an enterprise birth rate of 13.3%, the third highest rate of the twelve UK countries and regions. Of businesses started in Wales in 2013, 93.6% survived their first year, 60.6% year three and 42.0% were still operating after five years.

In 2019 across Wales the majority of enterprises had fewer than 10 employees. Around 64% of large enterprises fell under two sectors: Wholesale, retail, transport, hotels, food and Communication and financial and business services. The sector with the highest proportion of enterprises in the micro size-band was Agriculture, forestry and fishing. Half of workplace employment is based in the south east.

Survival rates of Welsh businesses founded in 2013 (2018 data)



Workplace employment by region, 2018

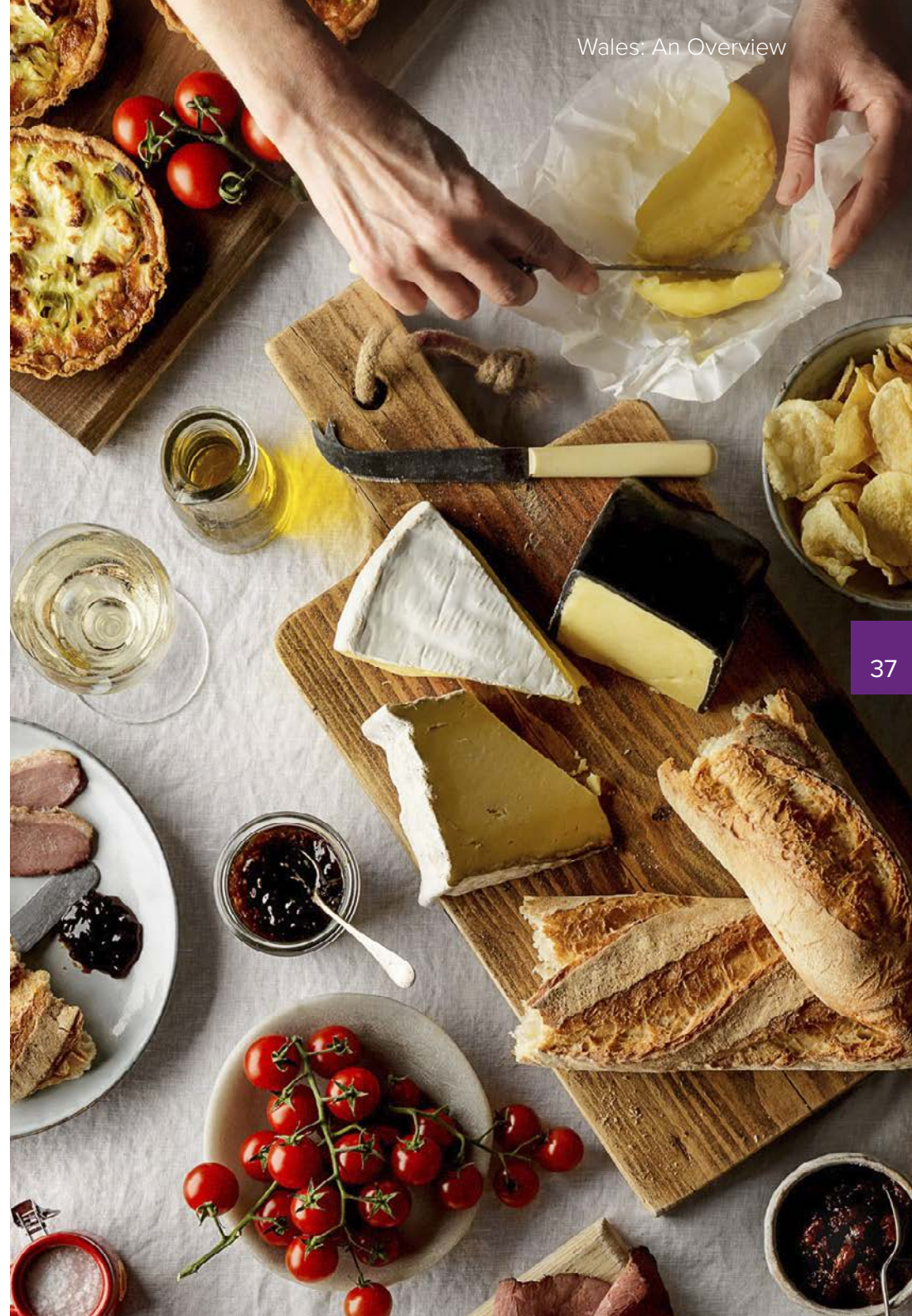


The value of exports for Wales for the year ending September 2019 was £17.8 billion, up £0.8 billion (4.9%) compared with the previous year. There was an increase in exports to EU countries of £503 million (4.9%) and an increase in exports to non-EU countries of £333 million (5.0%), compared with the year ending September 2018.

Exports to the EU accounted for 60.9% of Welsh exports compared with 48.8% for the UK. Germany continued to be the top export destination for Wales, accounting for 16.6% of exports. Welsh exports are dominated by 'Machinery and Transport Equipment' which make up 49.7% of exports.

The value of imports to Wales in 2019 was £18.1 billion, down £232 million (1.3%) compared with 2018. There was a decrease in imports of goods from the EU of £372 million (5.2%) and an increase to non-EU countries of £140 million (1.2%). Imports from the EU accounted for 37.6% of Welsh goods imports in 2019, compared with 54.3% for the UK. The USA continued to be the top import partner country for Wales, accounting for 17.6% of Welsh goods imports. Imports to Wales continued to be dominated by 'Machinery and Transport Equipment' which made up 37.4% of goods imports.

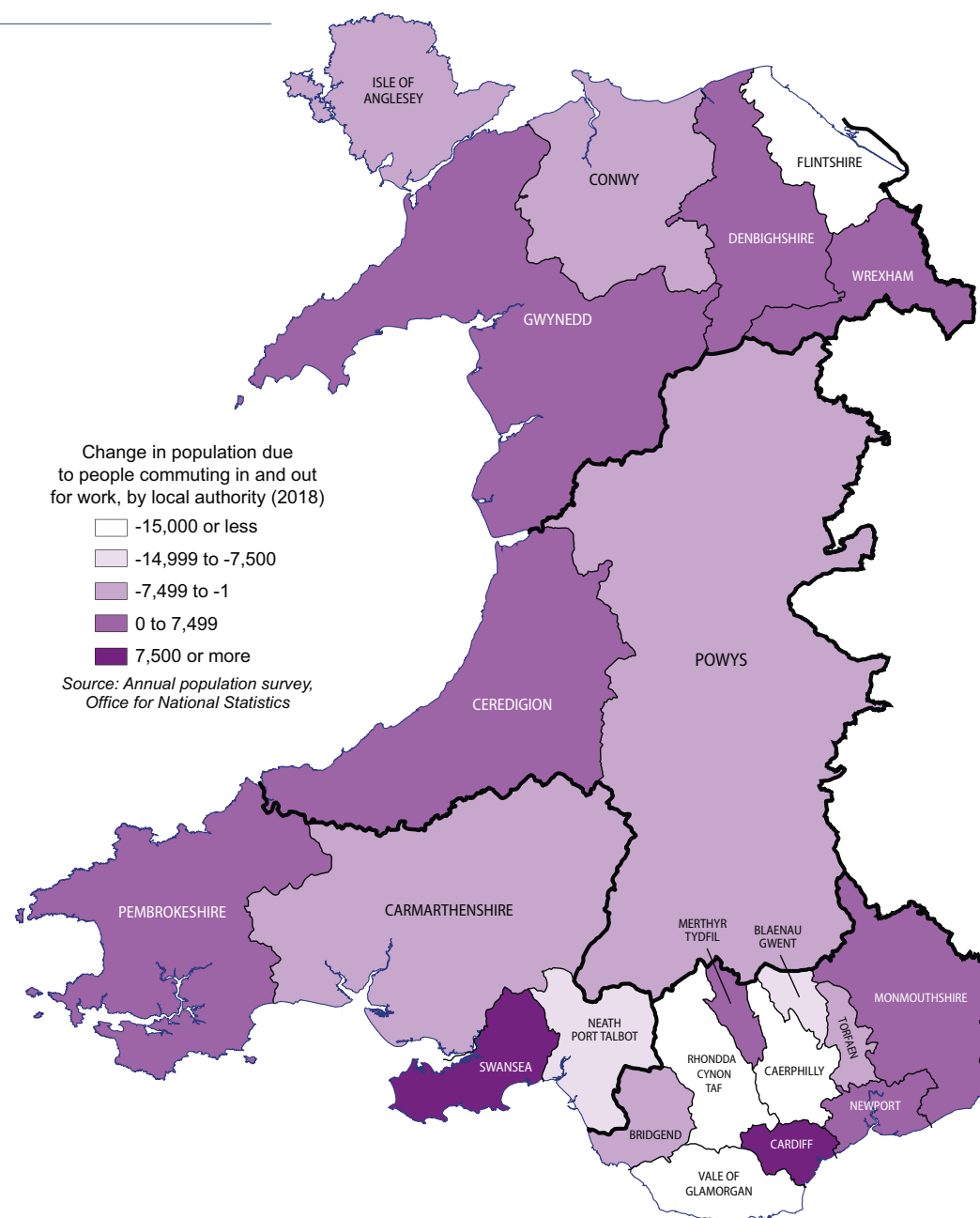
The value of mineral and material resources and the industry this supports is important at the local, regional and UK levels. In 2015 the minerals products industry supported 3,800 jobs directly, almost £650 million of sales/turnover and over £220 million of GVA in Wales. The industry plays a vital role in supporting the Welsh construction sector, which represents 6% of the Welsh economy, provides 88,000 jobs and has a turnover of £3 billion.





## Commuting

Commuting patterns are a distinctive feature of our regional economies, with significant daily movements of people to their place of work. These patterns reflect long-standing and well-developed regional hierarchies and centres of employment.



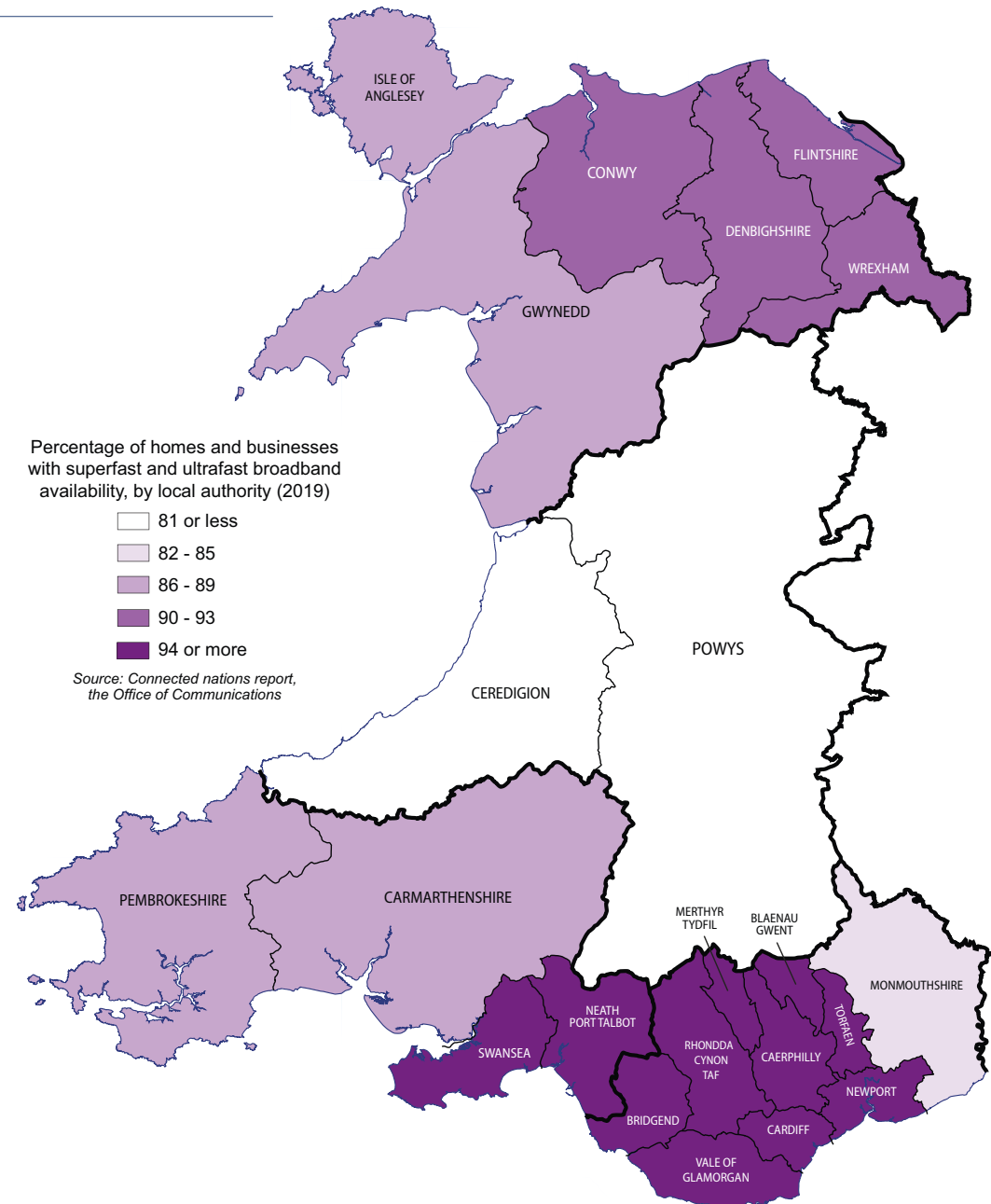






## Broadband

We are an increasingly connected nation. In September 2019, 93% of homes and businesses had access to superfast broadband speed and 31% to ultrafast. We are broadly in line with UK access to superfast (94%) but some way behind the UK rate for ultrafast (54%). This is a consequence of our dispersed settlements and distinctive topography, and increasing coverage is a key goal.

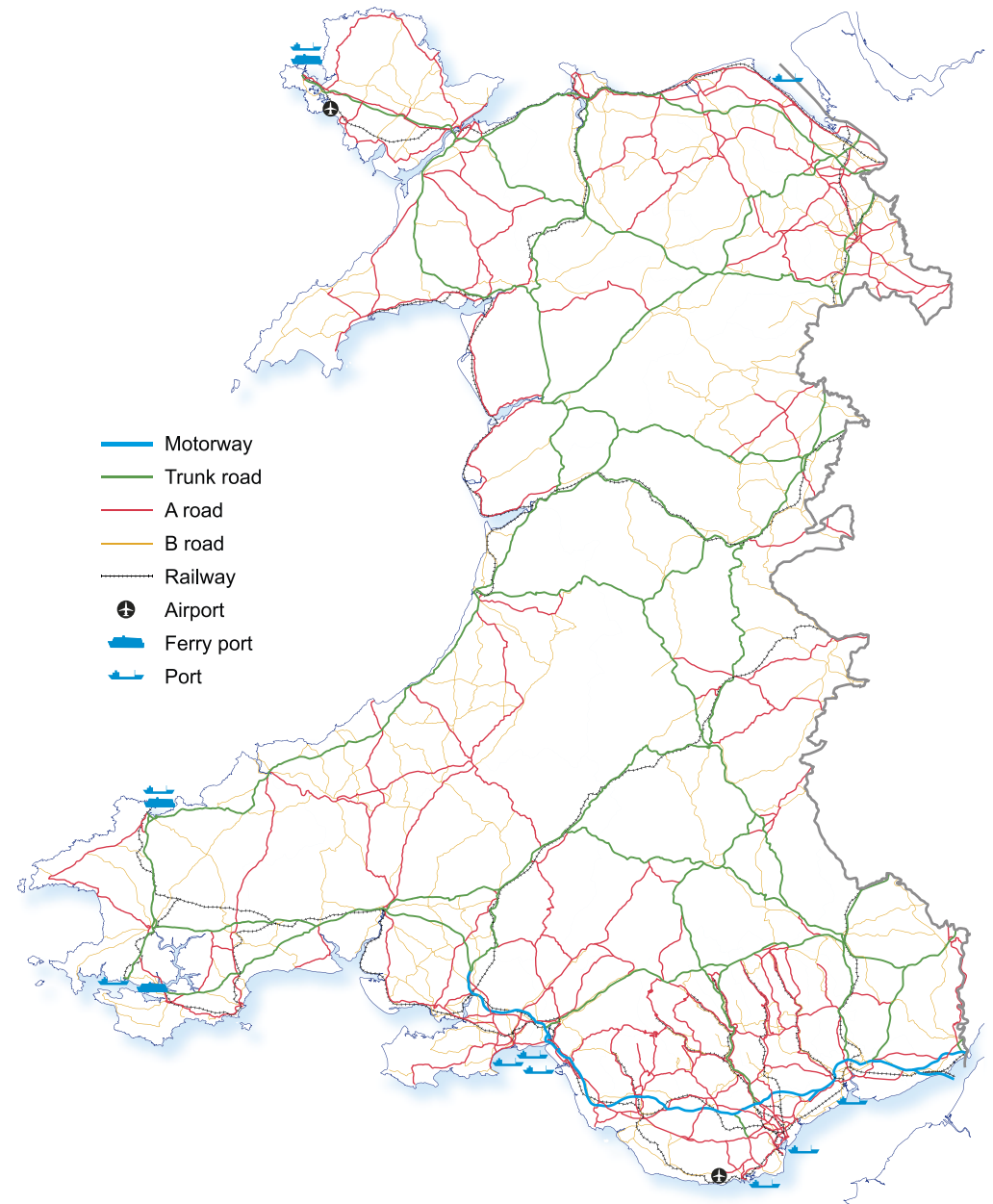






## Transport Infrastructure

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.



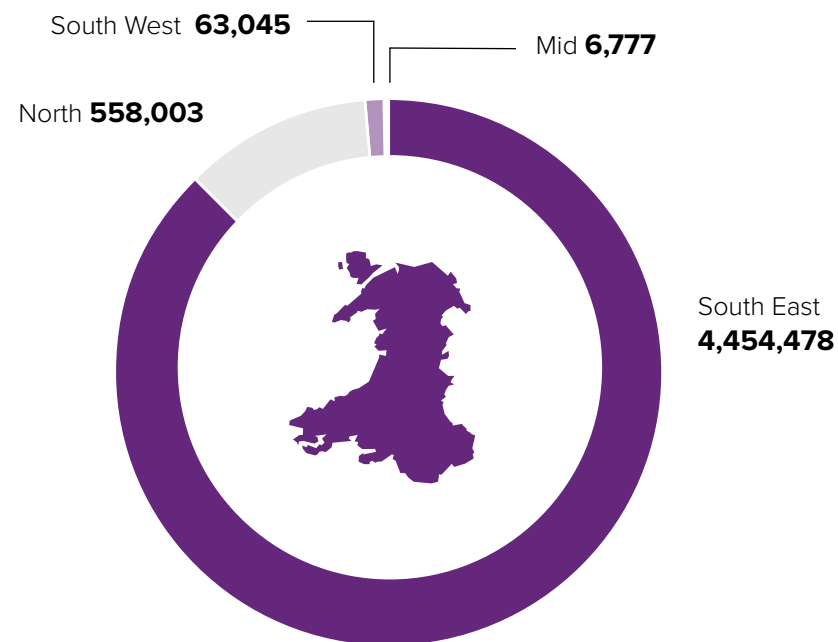


We visit and trade with Ireland, Europe and beyond and our ports, roads and rail lines are key connections into wider European networks. Total freight traffic at ports in Wales fell 4.8% in 2018 to 49.2 million tonnes, its lowest level since comparable records began in 1976. Our ports serve our different shipping needs. Milford Haven handles mainly crude oil, oil products and liquefied natural gas. Port Talbot imports iron ore and coal, mostly for the adjacent steelworks. Holyhead is the main port for freight and sea passenger transport with Ireland, with Fishguard and Pembroke providing key passenger and freight connections between the south of Wales and southern Ireland.

Trips to Wales by international visitors returned above one million in recent years. International visitors comprise around 10% of overnight visitors but 20% of expenditure due to their higher spending. Average spend per trip is more than double the level of GB domestic visitors. Ireland provides the highest volume of visits to Wales, followed by Germany, USA and France. Expenditure from all of these markets is around £30-40 million per annum. Enjoying the landscape and heritage are the primary motivations for international travellers visiting Wales.

Across Wales there were 52.5 million rail station entries/exits in 2017-18, accounting for 1.8% of the UK total. The number of train journeys made in Wales increased by 30% between 2007-08 and 2017-18. The vast majority of this increase was in journeys starting and/or finishing in the south east. The Wales Route, which represents 11% of the UK rail network, has received just over 1% of rail enhancements in recent years.

### Net change in rail journeys by region, 2007-08 to 2017-18









## Wales 2020 to 2040: Challenges & Opportunities

We face a number of challenges and opportunities and these have shaped Future Wales.





### Climate Change

The climate is already changing and in the most recent State of the UK Climate 2017 report, trends show the UK climate is continuing to warm and sea levels continue to rise. In terms of the future, the latest climate projections for Wales come from the 2018 UK Climate Projections. State of the art modelling is used to provide detailed projections of climate change up to 2100 (and to 2300 on sea level rise). The projections show an increased chance of milder, wetter winters and hotter, drier summers, rising sea levels and an increase in the frequency and intensity of extreme weather events.

Changes to our climate and weather patterns will have a significant impact on well-being on both current and future generations. Increasing temperatures and extreme weather events caused by climate change are putting pressure on ecosystems, infrastructure, built environment and our unique landscape and cultural heritage, which all contribute to social, economic and ecological resilience.

Climate change is an equality issue as it will disproportionately affect the most vulnerable communities in Wales and the wider world. This is despite the most vulnerable communities historically contributing the least to the problem of climate changing emissions. Vulnerable communities are more likely to be exposed to the risks and impacts of climate change without the ability to cope with or recover from those impacts.

### Climate change projections for Wales

		2050	2080
<b>Summer average temperatures in Wales</b>			
	are projected to increase by	<b>1.34°C</b>	<b>3.03°C</b>
<b>Winter precipitation in Wales</b>			
	is projected to increase by	<b>5%</b>	<b>9%</b>
<b>Summer precipitation in Wales</b>			
	is projected to decrease by	<b>16%</b>	<b>23%</b>
<b>Sea levels</b>			
are predicted to rise across the country*		For example in:	
	<b>North Wales (Llandudno), by</b>	<b>19cm</b>	<b>34cm</b>
	<b>Mid Wales (Aberystwyth), by</b>	<b>22cm</b>	<b>38cm</b>
	<b>South Wales (Cardiff), by</b>	<b>24cm</b>	<b>42cm</b>

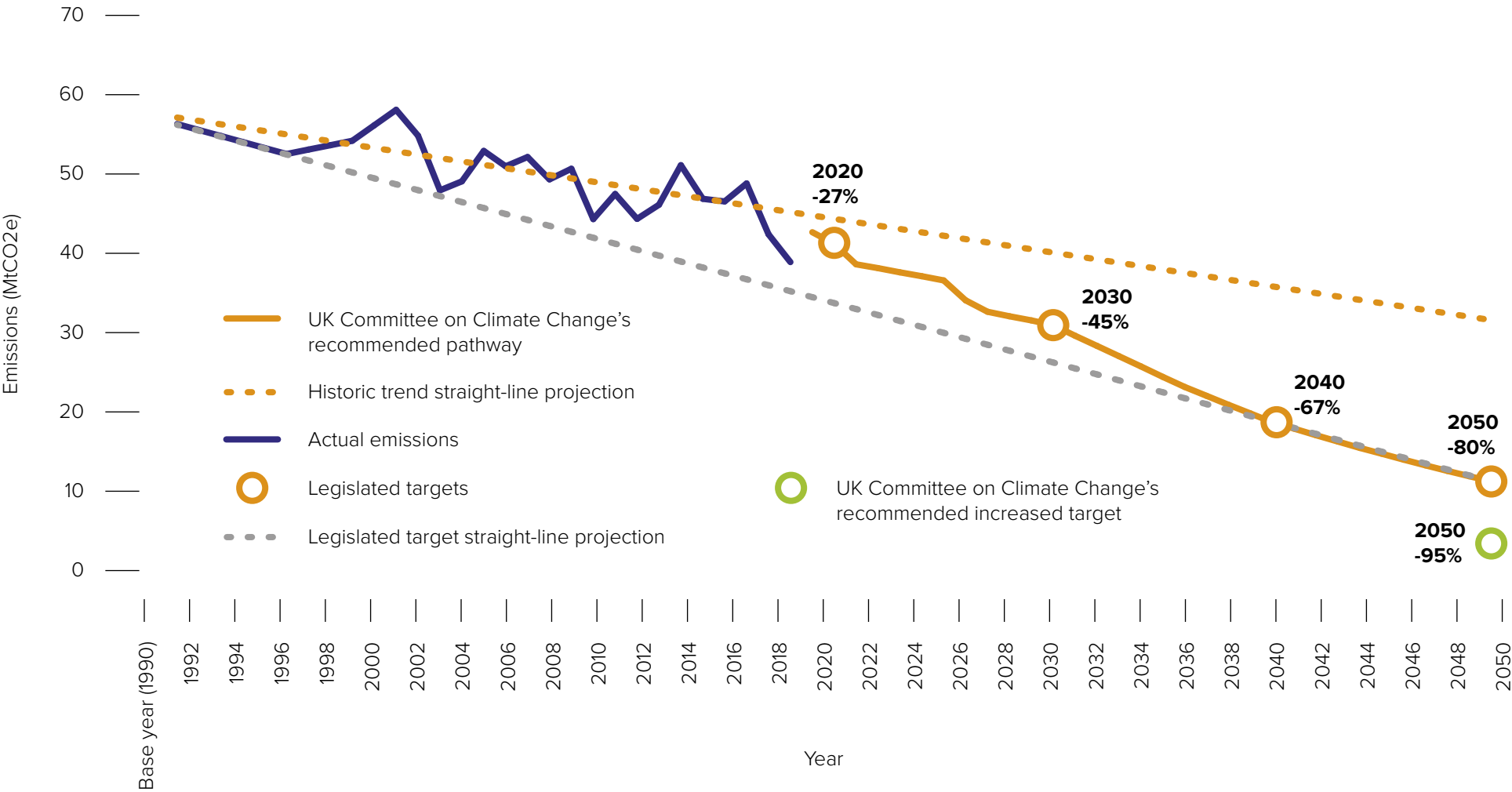
All projections are taken from a 1981-2000 baseline, at the 50th percentile, meaning they represent an outcome which is as likely as it is unlikely to occur.

\* SLR projections are taken from RCP 4.5 (medium-high) emissions scenario. All other projections from RCP 6.0 (high) emissions scenario.

It is vital that we reduce our emissions to protect our own well-being and to demonstrate our global responsibility. Future Wales together with Planning Policy Wales will ensure the planning system focuses on

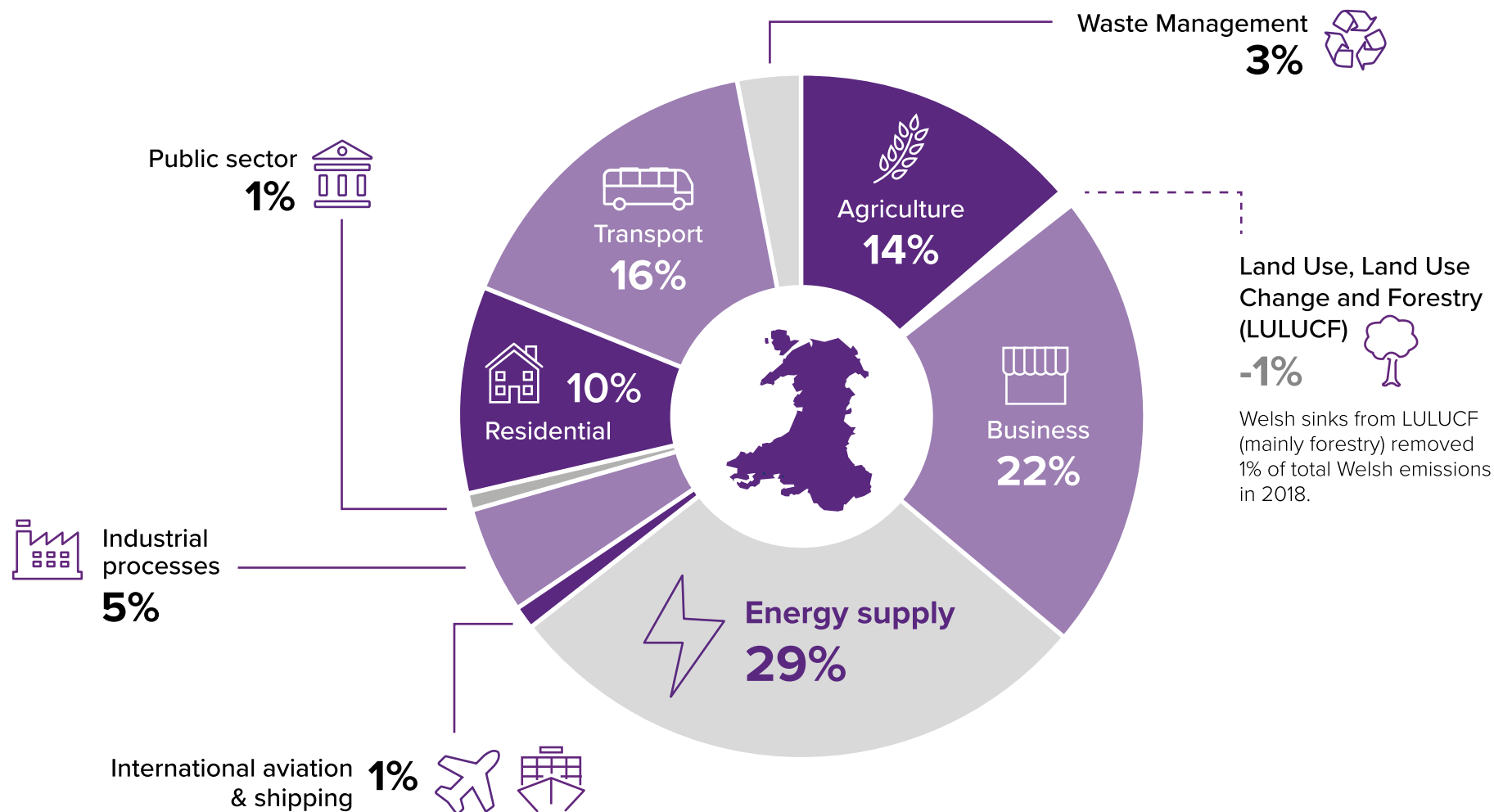
delivering a decarbonised and resilient Wales through the places we create, the energy we generate, the natural resources and materials we use and how we live and travel.

Progress made in meeting Greenhouse Gas Emissions targets in Wales





## Wales' greenhouse gas emissions 2018



## COVID-19

The COVID-19 pandemic is the biggest public health emergency in generations. It continues to impact all parts of the world and the legacy of the pandemic will shape public debate and decisions for years to come. Here in Wales many families have lost loved ones and the pandemic has had a dramatic effect on communities, the economy, how we live and on the environment. It has reminded us that the resilience of our communities and the places where we live can at times be fragile.

The quality and accessibility of our local areas was hugely important for people's health and their well-being during the toughest stages of the pandemic. There was a collective appreciation of the value of parks and green spaces, walking and cycling routes, local shops and amenities, and the cleaner air that emerged during the lockdown. The essential nature of good broadband and telecommunications connections to enable people to work from home, access services, and to stay in touch with one another has also been highlighted during this period. Good digital communications can have a positive effect on well-being. Among the many important challenges in the recovery period will be ensuring all communities enjoy access to these fundamentally important things.

Many of the urgent actions and changes in behaviour that were introduced in response to the pandemic are emerging as permanent features of life. The Welsh Government has published COVID-19 Reconstruction: Challenges and Priorities which outlines the issues our response to the pandemic must address. These have implications for the planning system as people are using places differently, travelling less and spending more time working from home. The planning system must respond to these changes and contribute to a sustainable recovery, shaping places around a vision for healthy and resilient places. Planning Policy Wales is the primary source of detail on how the planning system will support reconstruction efforts.

## Low Carbon Economy

Our low carbon economy is currently estimated to consist of 9,000 businesses, employing 13,000 people and generating £2.4 billion turnover in 2016. Over the past 20 years carbon greenhouse gas emissions have fallen, whilst Gross Value Added has risen. To increase our economic prosperity we must focus on delivering the clean growth aim and preparing the Welsh economy for the markets of the future and demand for low carbon goods and services.

## Renewable Energy

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.

## Natural Resources

Wales has a rich variety of nature conservation sites, covering 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. The need to reverse biodiversity decline and assist nature recovery is of imperative importance in its own right. Environmental pressures are causing global biodiversity decline at rates not previously encountered in human history and the rate of species extinction is accelerating.

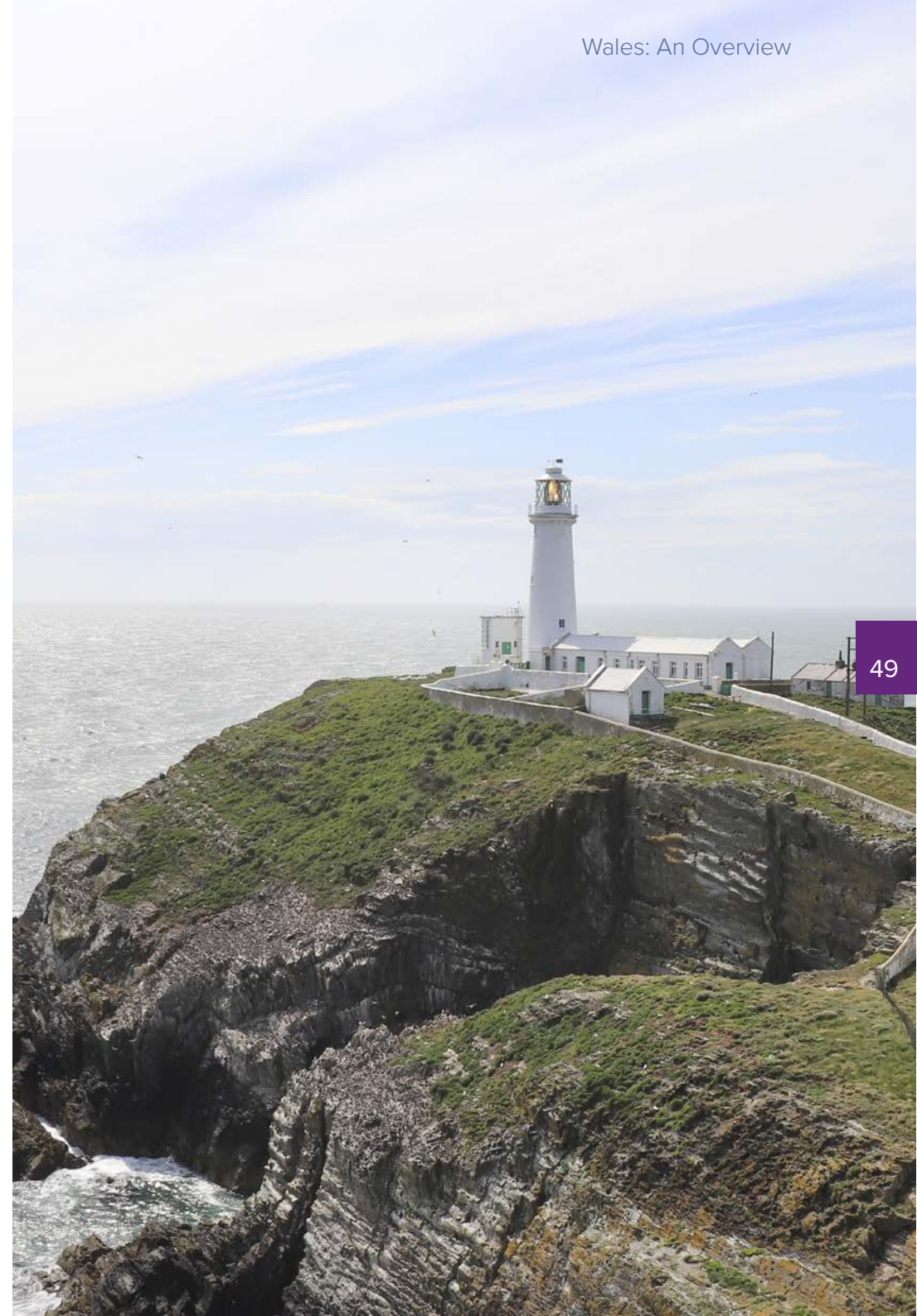
Many of our key industries such as agriculture, forestry, fisheries, energy, water and tourism rely on healthy, functioning ecosystems to prosper and to support communities across Wales. We must align the response to the climate emergency with the need to address the twin challenge for biodiversity. Ensuring the resilience of our ecosystems

will reverse biodiversity decline and provide 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. Future Wales will help support our national strategy for woodlands and trees.

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 that a reliable supply of minerals, which is capable of simultaneously meeting demand in all regions of Wales, is always available. This is vital for our economy and future growth. Whilst Wales will still depend on the sustainable use of primary mineral resources, more will need to be done to increase the use of secondary and recycled materials. The Welsh Government target to increase the proportion of aggregates production in Wales from secondary and recycled sources to at least 25% of total aggregates supply has been exceeded, but more will need to be done to move beyond the current estimate of 30% of supply deriving from such sources as part of progress towards a truly circular economy.

## Water & Coasts

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. By identifying the locations of national and regional growth there is an opportunity to consider where we will need water and how we can safeguard our resources in the future. Focusing development in existing built-up areas may reduce the likelihood of a need for significant new sources of water, but we must recognise the potential impact of all future development patterns and climate change on the supply and availability of water.





The management of our coasts is important for all regions as the built-up coastal areas are where the majority of people live. Shoreline Management Plans identify opportunities to build ecosystems resilience and help ensure choices on where development should be are informed by erosion and current and future flood risks.

## **A Changing Society**

Our society is ageing. We need to think about the type of homes 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.

We also need to think about how we will retain and attract young people to all parts of Wales, provide opportunities to support children and young people and promote active lifestyles. Future Wales 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 and we are determined to create places that support our well-being across the whole of our lives.

Future Wales 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.

Having left the European Union, we are especially vulnerable to potential impacts arising from future new arrangements. Both agricultural funding and regeneration programmes are areas of major public policy which have been shaped by European funding policies over a long time.

In response to this uncertainty and the forging of new relationships, Future Wales 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.

## **Housing**

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. Future Wales provides evidence of the need for housing across Wales at both a national and regional level. This evidence demonstrates the need for a focus on increasing the delivery of social and 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, including our ageing society and climate change.

## **Prosperity**

The pace of change in technology is a challenge and opportunity for all nations. The jobs that future generations will do may not yet have been invented. 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.

Our universities can play an important role both nationally and regionally, leading innovation and research and providing opportunities for students of all ages to grow and develop. They play a key role in their local communities, attracting students from all around the world to different parts of Wales and supporting local economies and businesses. Planning authorities should proactively engage with universities to maximise the role they can play in supporting national and regional development.

Work patterns have the potential for change too, becoming more flexible in terms of location and hours. Future Wales 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 Welsh Government recognises and supports the important role of businesses of all sizes, from major international manufacturers to micro businesses, in strengthening, diversifying and increasing the resilience of our economy. There is no 'one size fits all' approach and it is important that positive steps are taken to support new and existing businesses of all sizes.

Prosperity and reducing inequality remain priorities for the Welsh Government. Prosperity is not equal across all parts of the country. Health varies across Wales with our poorest communities experiencing pronounced differences in health outcomes compared to more affluent areas. Future Wales 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.

The Ministry of Defence is an important landowner with many strategic assets across Wales which provide significant levels of employment and contribute economically, socially and culturally to many local communities. Military assets in Wales are important to the UK's strategic defence systems and Future Wales seeks to protect these areas for these uses and from the impacts of development which could impinge upon them.

## Travel

Movement across Wales is shaped by our topography and the distance between the main built-up areas in the north and south. Connections between the north and south 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 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.

## Our four regions

We have four strong, diverse and proud regions. Future Wales supports the North, Mid Wales, the South West and the South East regions in shaping their futures and proactively using the planning system to deliver a better Wales. Many of the opportunities and challenges we face will be best met by co-ordinated actions at the national and regional levels. Each region through co-ordinated and joined-up working and the preparation of Strategic Development Plans, can plan and manage their futures together.

# 3 Setting and achieving our ambitions

**We have a clear vision of Wales in 2040 and the steps we need to take to get there. Everyone has a role to play in shaping a future that is sustainable, healthy, equitable and fair.**

Identifying what we want to achieve is an important step in preparing a strategy for a development plan. Future Wales' 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 Future Wales, from the spatial strategy to regional policies, is concerned with achieving the Outcomes. Most policy areas will contribute to multiple Outcomes.

The 11 Outcomes can be achieved over the next 20 years if the planning system – through Future Wales and other development plans – is focused 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.

We will measure the impact and effect of Future Wales continually. After no more than five years from its publication, we will need to decide whether to update Future Wales. The review process for measuring the impact of Future Wales, assessing if it is successful and deciding whether to update it, is set out on page 58.

Identifying what we want to achieve is an important step in preparing a strategy for a development plan





## The Future Wales Outcomes

# A Wales where people live

1

... and work in connected, inclusive and healthy places

Our cities, towns and villages will be physically and digitally well connected places, 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 vibrant rural places with access to homes, jobs and services

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. The rural economy will be thriving and communities will be well connected digitally and physically. There will be support for the agricultural sector and its supply chains to boost resilience through diversification.

3

... in distinctive regions that tackle health and socio-economic inequality through sustainable growth

The regional approach will recognise that different parts of Wales work differently to each other, with distinct underlying characteristics and challenges. Inequalities in the four regions will be addressed 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

... in places with a thriving Welsh Language

We aim to have a million Welsh speakers in Wales by 2050 – an increase of almost 80% on current levels. The language will be an embedded consideration in the spatial strategy of all development plans. 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 development will be a positive force towards encouraging the creation of education and social infrastructure to enable the language to develop as a natural, thriving part of communities.



## The Future Wales Outcomes

### A Wales where people live

5

... and work in towns and cities which are a focus and springboard for sustainable growth

Cities and large towns will be 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. Investment in active travel, public transport, flood risk management and green infrastructure will enable population growth and economic growth while reducing pollution and carbon consumption. 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

... in places where prosperity, innovation and culture are promoted

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

... in places where travel is sustainable

All methods of travel will have low environmental impact and low emissions, with increased use of public transport and ultra-low emission vehicles replacing today's petrol and diesel vehicles. Sustainable transport infrastructure will be embedded within development to enable easy and convenient access from one place to another for commuting, business, tourism and leisure purposes. Development will focus on active travel and public transport, allied with a reduced reliance on private vehicles.

8

... in places with world-class digital infrastructure

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 and improve the way of life for communities and individuals. Better digital communication will enable economic and social progress and ensure Wales can lead and keep pace with the latest global technological advancements.



## The Future Wales Outcomes

# A Wales where people live

9

... in places that sustainably manage their natural resources and reduce pollution

Wales' natural resources, including its minerals, soils and geodiversity, 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 the risks of flooding and coastal erosion will be effectively managed and mitigated while better resource choices will be reflected in more sustainable places. Places will benefit from reduced pollution and be healthier and more liveable.

10

... in places with biodiverse, resilient and connected ecosystems

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

... in places which are decarbonised and climate-resilient

The challenges of the climate emergency 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 commitments and renewable energy 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. New homes will be energy efficient and will help communities adapt to the changing climate.







## Reviewing Future Wales

Every five years the Welsh Government will prepare and publish a review of Future Wales. The review will set out progress in delivering the Future Wales Outcomes and shaping the Wales we wish to see by 2040.

The review will be based on four key sources:

1

### **The National Indicators**

There are 46 National Indicators and they help to tell a story of progress against the well-being goals established in the Well-being of Future Generations (Wales) Act 2015.

2

### **Future Wales policy related indicators**

Future Wales policy related indicators cover the range of topics addressed by Future Wales policies. These indicators will help us understand in more detail the key trends and patterns Future Wales seeks to influence.

3

### **The Integrated Sustainability Appraisal**

The Integrated Sustainability Appraisal is a process that has supported the development of Future Wales from the outset. It has its own set of objectives, indicators and baseline data. Analysing these will help us think about the Future Wales Outcomes and Future Wales' effect on the Integrated Sustainability Appraisal baseline data.

4

### **Contextual evidence and influencing factors**

Contextual evidence and influencing factors will include a broad range of economic, cultural, environmental and social data. We will assess national and regional statistics on issues such as the economy and employment, population and the environment. Over the first five years of Future Wales, changes such as new Welsh Government policies, new research and publications will all provide an important context to the National Indicators and Future Wales policy related indicators. As we approach the review stage, we will also invite people to submit evidence they think should be considered.



Collectively this information and our analysis of it will help determine what new or further actions are required to deliver the Future Wales Outcomes. The review could conclude that Future Wales' direction of travel is on track and that no major action is required. It could find Future Wales to be on track in some areas and less so in others. We will determine what changes are required to ensure progress is made in all areas.

If there are significant changes to Welsh Government policy, if relevant new legislation is introduced or if Future Wales is determined not to be making progress towards its Outcomes, we will consider how Future Wales should be revised. It may be necessary to prepare a replacement national development framework. In this scenario, as with the preparation of Future Wales, public and stakeholder engagement and consultation will be a central feature of the process.

Future Wales is a long term 20-year plan and the strategic change it seeks will take time to achieve. We are confident the Future Wales Outcomes and spatial strategy will remain the right ones over the whole plan period and the review will primarily focus on actions necessary to maintain a focus on achieving Future Wales' ambitions.

As set out in Chapter 1, Future Wales is one of a number of plans and strategies driving change in Wales. Not all the changes we seek can be directly addressed by the planning system alone. Future Wales' review will identify where the planning system must work with the wider public, private and community interests to deliver the Outcomes.

## **The First Review: How will we know if Future Wales has been successful?**

Achieving the Future Wales Outcomes will mean that places in Wales will be better. The success of Future Wales will be determined by its delivery towards the Outcomes.

There is a balance to be struck in the first review between medium and longer term actions. For the initial phase of Future Wales' life there are seven key questions which help us determine its progress. These are:

### **Has Future Wales:**

- 1** supported decarbonisation?
- 2** supported full development plan coverage at all three development plan tiers?
- 3** supported the delivery of renewable energy?
- 4** helped meet housing needs in the right places?
- 5** made places healthier?
- 6** helped strengthen ecosystems and enhanced biodiversity?
- 7** supported an economy that delivers prosperity for all?

# 4 Strategic and Spatial Choices: Future Wales' spatial strategy

**A spatial strategy identifies and connects key national and regional centres, provides a basis for long term infrastructure investment, identifies priorities for the planning system and a framework for the management of natural resources.**

Future Wales' 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 Future Wales 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 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. The strategy 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 a million Welsh language speakers 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 or 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.

Growing urban areas across Wales 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. Urban growth 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 achieving biodiversity and green infrastructure enhancements 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.

# Spatial Strategy

National Growth Area



Regional Growth Area



Strategic Gateways



International Connectivity



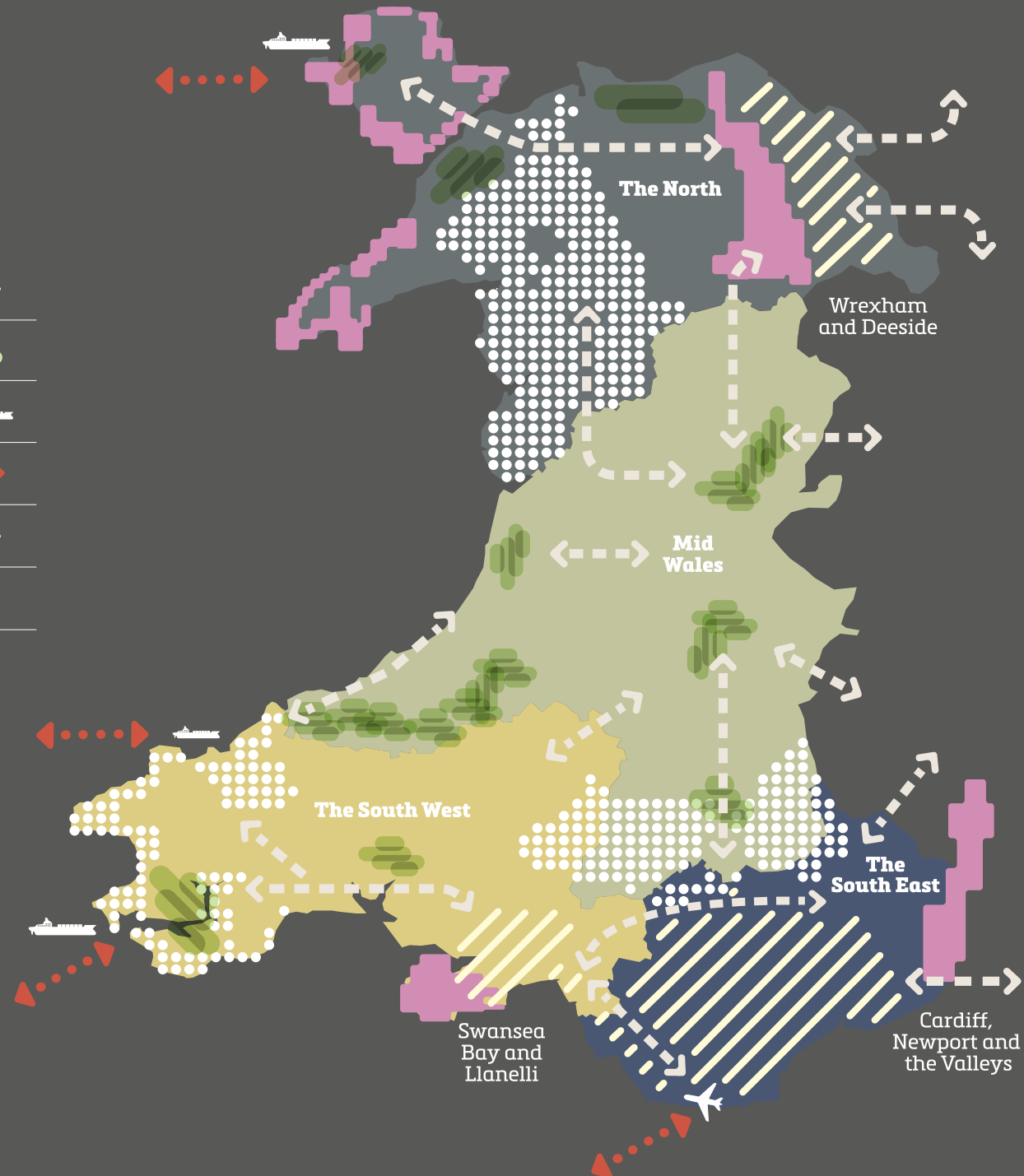
National Connectivity



National Parks



Areas of Outstanding Natural Beauty (AONBs)







## Policy 1 – Where Wales will grow



The Welsh Government supports sustainable growth in all parts of Wales. In three National Growth Areas there will be growth in employment and housing opportunities and investment in infrastructure. The National Growth Areas are:

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

The National Growth Areas are complemented by Regional Growth Areas which will grow, develop and offer a variety of public and commercial services at regional scale. There are Regional Growth Areas in three regions:

- The South West
- Mid Wales
- The North

Development and growth in towns and villages in rural areas should be of appropriate scale and support local aspirations and need.

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### National Growth

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 internationally and nationally significant places and this strategy promotes their continued growth and regeneration. There are detailed policies in Chapter 5 on each of the National Growth Areas setting out their role in a national and regional context.

Future Wales identifies a range of important Regional Growth Areas 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.

The Regional Growth Areas are:

### South West

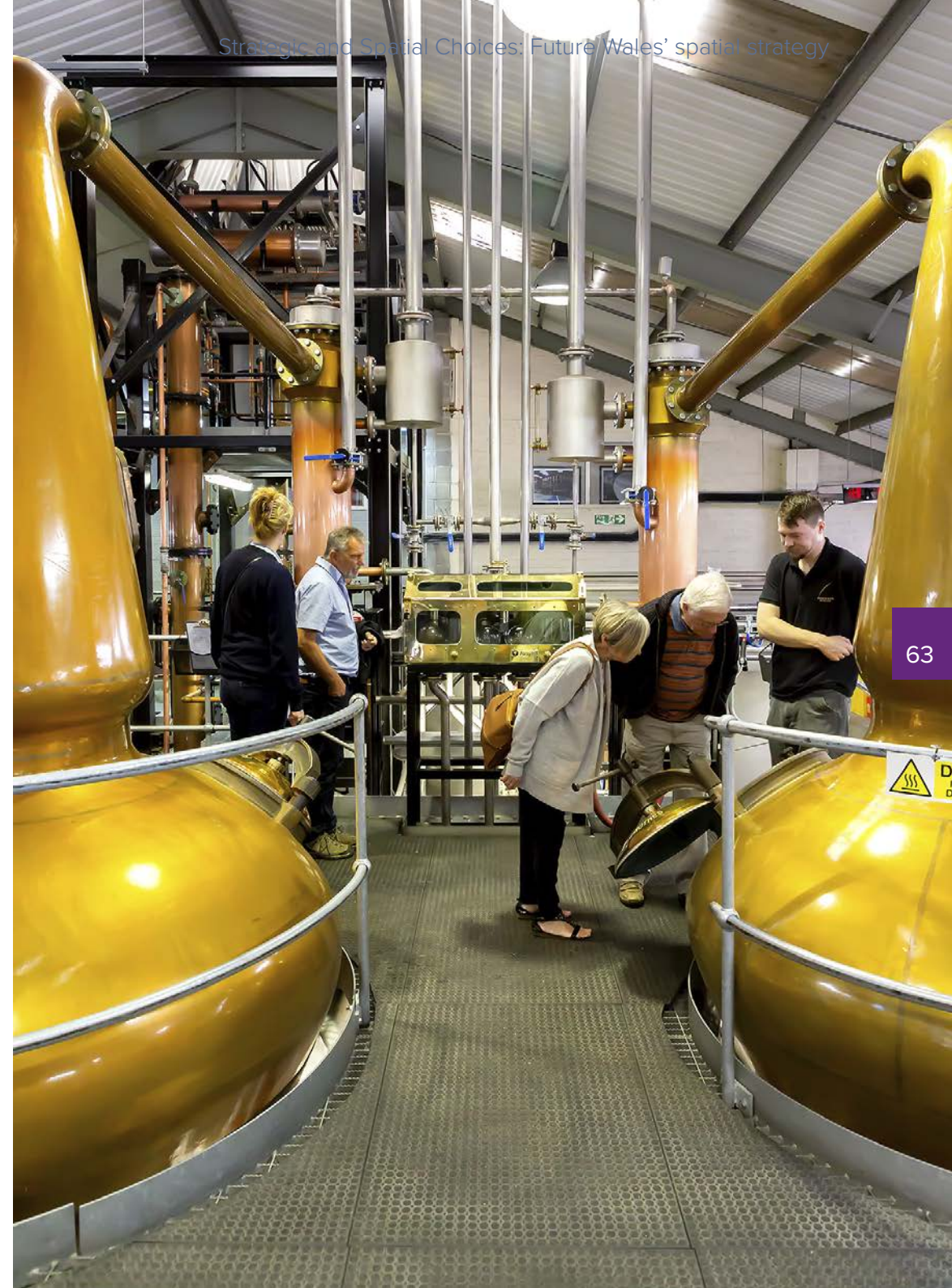
- Carmarthen
- The Pembrokeshire Haven Towns, including:
  - Haverfordwest
  - Milford Haven
  - Pembroke
  - and
  - Pembroke Dock

### Mid Wales

- The Teifi Valley, including:
  - Cardigan
  - Newcastle Emlyn
  - Llandysul
  - and
  - Lampeter
- Brecon and the Border
- The Heart of Wales, including:
  - Llandrindod Wells
  - and
  - Builth Wells
- Bro Hafren, including:
  - Welshpool
  - and
  - Newtown
- Aberystwyth

### North

- Holyhead
- Caernarfon and Bangor
- Llandudno and Colwyn Bay
- Rhyl and Prestatyn



Beyond the National and Regional Growth 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. Policies 4 and 5 are particularly relevant in these places.

By focusing 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 focused 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.

Policy 1 drives the delivery of the Future Wales Outcomes and ensures Future Wales' policies and the planning system in general are committed to their achievement. Key issues, including decarbonisation, health, prosperity and the Welsh language, are core elements of policy 1 and are common threads underpinning all Future Wales policies.

The remainder of Chapter 4 sets out national policies that are critical to the successful delivery of the spatial strategy. These policies address the nature of development in urban and rural areas, within the identified Growth Areas and beyond. The policies will ensure places are well planned and have strategies for ensuring our needs and demands are met and managed in a sustainable way. How we shape places will determine how we respond to climate challenges and make use of our resources. 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.





## Policy 2 – Shaping Urban Growth and Regeneration – Strategic Placemaking



The growth and regeneration of towns and cities should positively contribute towards building sustainable places that support active and healthy lives, with urban neighbourhoods that are compact and walkable, organised around mixed-use centres and public transport, and integrated with green infrastructure.

Urban growth and regeneration should be based on the following strategic placemaking principles:

- creating a rich mix of uses;
- providing a variety of housing types and tenures;
- building places at a walkable scale, with homes, local facilities and public transport within walking distance of each other;
- increasing population density, with development built at urban densities that can support public transport and local facilities;
- establishing a permeable network of streets, with a hierarchy that informs the nature of development;
- promoting a plot-based approach to development, which provides opportunities for the development of small plots, including for custom and self-builders; and
- integrating green infrastructure, informed by the planning authority's Green Infrastructure Assessment.

Planning authorities should use development plans to establish a vision for each town and city. This should be supported by a spatial framework that guides growth and regeneration, and establishes a structure within which towns and cities can grow, evolve, diversify and flourish over time.

### Shaping urban growth and regeneration

The growth aspirations of Future Wales are an opportunity to regenerate our towns and cities and shape their extent, structure and density. Placemaking is at the heart of the planning system in Wales and this policy establishes a strategic placemaking approach and principles to support planning authorities to shape urban growth and regeneration.

Before making decisions about site allocations or development proposals, it is essential to have a clear picture of the evolving shape of places and to develop a vision or strategy for their future. As well as identifying the best way in which towns and cities can expand, it is important to plan for existing neighbourhoods, particularly those in need of regeneration.

A spatial framework establishes the long term pattern of streets, land use, density, movement and green infrastructure. It is a tool to identify the best locations for growth and regeneration and provide a structure to enable change to happen over time.

The visions and supporting spatial frameworks for places should inform and be supported by Strategic and Local Development Plan spatial strategies, site allocations and policies. They should also form the basis for other measures to support implementation, such as masterplans, site briefs and design codes.

This policy is primarily focused on shaping growth and regeneration within the National and Regional Growth Areas. The approach and the principles are also applicable to smaller towns and should be applied to reflect the local context. Further guidance on the strategic placemaking approach and principles in this policy will follow to support its implementation.

## Strategic Placemaking Principles

### Mix of uses

To create activity throughout the day and enable people to walk and cycle, rather than being reliant on travelling by car, places should have a rich mix of residential, commercial and community uses within close proximity to each other. Urban growth and regeneration should integrate different uses within neighbourhoods.

### Variety of housing

To ensure places are socially mixed and cater for varied lifestyles, they should have a mix of housing types and tenures and space that allows for home-working. Urban growth and regeneration should cater for families, couples and single people of different ages, as well as providing a mix of affordable and private housing.

### Walkable scale

To enable active and healthy lives, people should be able to easily walk to local facilities and public transport. Urban growth and regeneration should be focused within inner city areas and around town centres, as well as around mixed use local centres and public transport. Co-working hubs offering an alternative to home-working are an important feature of the economy, and these should be located in town and local centres.

### Density

To support the economic and social success of our towns and cities, including sustaining public transport and facilities, urban growth and regeneration should increase the population density of our towns and cities. New developments in urban areas should aim to have a density of at least 50 dwellings per hectare (net), with higher densities in more central and accessible locations. It may be necessary to take social distancing requirements into consideration when designing public and communal spaces.

### Street network

To provide a framework for different uses and types of housing to be integrated within neighbourhoods, urban growth and regeneration should be based on a network of streets that enable social distancing if necessary. The street network should be permeable, with streets primarily connecting at both ends with other streets and providing links into, out of, and through places. The street network should have a hierarchy, with streets that have different characters and functions.

### Plot-based development

To create varied and interesting places, which can be developed and change over time, and provide opportunities for people to design and build their own homes and workspaces, as well as open up the housing market to small and local builders, urban growth and regeneration should provide opportunities for the development of small plots. A plot-based approach to development should be promoted, including the subdivision of larger sites to be built in small plots or as a group of plots.

### Green infrastructure

To enable urban areas to play their part in supporting ecosystem resilience, the use of innovative nature-based solutions should form part of strategies for urban growth and regeneration. Through Green Infrastructure Assessments, specific opportunities should be identified to ensure that green infrastructure is fully integrated.



## Policy 3 – Supporting Urban Growth and Regeneration – Public Sector Leadership



The Welsh Government will play an active, enabling role to support the delivery of urban growth and regeneration. The Welsh Government will assemble land, invest in infrastructure and prepare sites for development. We will work with local authorities and other public sector bodies to unlock the potential of their land and support them to take an increased development role.

The public sector must show leadership and apply placemaking principles to support growth and regeneration for the benefit of communities across Wales. The public sector's use of land, developments, investments and actions must build sustainable places that improve health and well-being.

Planning authorities must take a proactive role and work in collaboration with the Welsh Government and other public sector bodies to identify the best locations for growth and regeneration, and provide certainty about how they should be developed.

### Supporting urban growth and regeneration

A strengthened public sector role in assembling land and enabling development is essential to realise our growth and regeneration aspirations.

The development industry in Wales, along with the UK as a whole, is currently dominated by a small number of large developers. It must respond positively to our placemaking policies, but a greater public sector role is also needed. The public sector can enable a wider range of smaller and local developers to deliver growth and regeneration throughout Wales, and create the homes and neighbourhoods that will build sustainable communities for this and future generations.

The Welsh Government's priority is to secure public benefits. We want to increase the delivery of social housing, open up the housing market to a wider range and size of developers and support vibrant neighbourhoods with a mix of uses and affordable workspaces. The public sector must lead by example and apply placemaking principles to create exemplar developments. In particular, the public sector must prioritise design quality, innovation and sustainability. Opportunities to create ecological networks, provide ecosystem services and green infrastructure should be maximised. Developments should be resource efficient and reflect the principles of a circular economy.

Compulsory purchase powers are available to the public sector to assemble land and, where necessary, will be used to support the delivery of urban growth and regeneration.





## Policy 4 – Supporting Rural Communities



The Welsh Government supports sustainable and vibrant rural communities.

Strategic and Local Development Plans must identify their rural communities, assess their needs and set out policies that support them. Policies should consider how age balanced communities can be achieved, where depopulation should be reversed and consider the role of new affordable and market housing, employment opportunities, local services and greater mobility in tackling these challenges.

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## Policy 5 – Supporting the rural economy



The Welsh Government supports sustainable, appropriate and proportionate economic growth in rural towns that is planned and managed through Strategic and Local Development Plans.

Strategic and Local Development Plans must plan positively to meet the employment needs of rural areas including employment arising from the foundational economy; the agricultural and forestry sector, including proposals for diversification; start-ups and micro businesses.

The Welsh Government also strongly supports development of innovative and emerging technology businesses and sectors to help rural areas unlock their full potential, broadening the economic base, and creating higher paid jobs.

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### Vibrant rural areas

Large parts of Wales are rural in character with 40% of the population living in settlements with fewer than 10,000 people. Rural areas are diverse, with both prosperous and deprived communities, innovative businesses, essential resources and distinctive histories and cultures. They draw visitors from around the world and they play a major role in meeting our water, food and energy needs.

The Welsh Government wants vibrant rural areas with services to meet the needs of those living there in a sustainable way. Strategic and Local Development Plans must develop policies

that support rural areas. Where these plans identify growth in rural areas, it must be appropriate and proportionate to the needs of the settlement and the wider rural area they serve.

Planning authorities should be confident in identifying which areas are rural, using their understanding of the issues and geography of an area to prepare appropriate definitions. A rural location within proximity of major urban areas experiences different issues compared with a more isolated rural location. It may not be appropriate for policies to be applied to both types of location equally.

Many rural towns and villages are integral to their surrounding areas. Thriving, resilient and sustainable rural settlements are characterised by a rich mix of housing, employment, services, and infrastructure, located in the right places to meet the needs and future aspirations of the population. The experience of COVID-19 showed how important such facilities are, and how they help to make rural communities resilient. Within settlements different uses should be situated in close proximity to each other, reflecting the strategic placemaking principles, to help create vibrant active places where people can walk and cycle and are less reliant on cars.

Where housing, employment, key services and infrastructure are not sufficient to accommodate current or future needs, or are not easily accessible, the resilience and sustainability of an area may be undermined, possibly leading to economic and social decline. This may manifest itself in rural depopulation, age imbalance, deprivation, inequality or social isolation. If people move away to seek opportunities elsewhere, the viability of services and facilities can become compromised, especially in smaller settlements with a limited customer base.

Planning authorities should recognise the challenges facing their rural communities and set out policies to help address them. They should consider the role that housing, employment areas and home-working, health and social services, places of education, emergency services, shops and infrastructure can play in tackling these challenges and in helping create more sustainable places.

Sustainable rural settlements are accessible places and well connected to the wider areas they serve. The Welsh Government strongly supports enhanced public transport and active travel modes but recognises that travel by car may be the only realistic mode of travel for some, especially in remote

areas. The Welsh Government will support investment in public transport, active travel and vehicle charging networks to support ultra-low emission vehicles. It will also support investment in the road network where this is necessary to maintain or improve rural accessibility, sustainability and community well-being.

In every region planning authorities should support improvements to connectivity within and between rural settlements. They should assess the need to improve connectivity between regions and be confident to align regional and local development proposals with opportunities in neighbouring authorities.

Regions should work together to identify ways to develop stronger strategic transport links between rural areas and larger towns and cities for mutual economic benefit. It is important that rural communities can access 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 important that rural communities develop strong economies and support local enterprise. The presence of local rural business and employment opportunities can reduce the need for workers to travel long distances and reduce the reliance on larger economic centres.

Lack of employment opportunity is a key reason behind rural depopulation, particularly in the younger workforce; it can also contribute to deprivation and inequality. Developing local opportunities, particularly in higher paid sectors, is important to retain workers, broaden the skills base and help sustain communities. Rural areas should develop a broad economic base which supports a strong foundational sector, agricultural and forestry industry, innovative and emerging technology based enterprise, start-ups and micro businesses.

The increasing ability to work from home and remotely from main offices may result in higher demand to live in rural areas and opportunities to retain the working age population. This could bring positive impacts for rural enterprises and the foundational economy. Care and health services, food and drink, housing, energy, construction, tourism and retailers on the high street are all examples of the foundational economy; this sector makes up approximately 40% of jobs in Wales.

Foundational economic activities remain the backbone of the rural economy. In particular, tourism and leisure is recognised as a major and growing employer and contributor to the Welsh rural economy. Sustainable forms of tourism, including opportunities for active, green and cultural tourism, should be explored. Similarly, local food and drink processing of agricultural and horticultural products is a growing industry. Planning authorities should support new development and opportunities to improve or develop rural supply chains and distribution networks.

Diversification is strongly supported to help maintain a sustainable and resilient agricultural and forestry sector, particularly in the face of challenges presented by the UK's exit from the European Union. Policies and criteria to enable appropriate diversification should be set out in Strategic and Local Development Plans.

Rural areas are the base for many innovative technology based companies and there is potential to expand this aspect of the economy. The sector includes research and development, defence and security, animal health and veterinary science, bio-technology and agri-tech, and energy. Regional assessments of potential clustering opportunities for rural businesses gaining mutual benefit from close proximity should be investigated.

Strategic and Local Development Plans should address the need and opportunity for all types of suitable employment across rural areas, ensuring the provision of appropriate sites and alignment with sustainable and planned growth strategies for settlements, including for infrastructure, housing and services.

Digital communications in rural Wales support an increasingly diverse business base and will be particularly important in attracting innovative and technology based companies. Mobile telecommunications and fixed line broadband are essential to access services, enable social and economic interaction, enhance education, and support well-being, including addressing issues such as social isolation and exclusion.

Planning authorities should work with digital communications providers to ensure the needs of rural areas are addressed and planned for through policies in Strategic or Local Development Plans. In sensitive landscapes and other designated areas digital telecommunications infrastructure will be carefully located to minimise visual impact. Digital communications are discussed in more detail in policy 13.

Rural areas play a crucial role in helping decarbonise Wales by providing suitable environments for different forms of renewable energy. Policies 17 and 18 set out Future Wales' approach to renewable energy generation across Wales and its relationship with rural areas.





## Policy 6 – Town Centre First



Significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres. They should have good access by public transport to and from the whole town or city and, where appropriate, the wider region.

A sequential approach must be used to inform the identification of the best location for these developments and they should be identified in Strategic and Local Development Plans.

### Town Centre First

To breathe new life into town centres, the Welsh Government has adopted a 'Town Centre First' approach. This puts the health and vibrancy of town centres as the starting point of locational decision-making. It also directs facilities and services to where intended users can easily walk, cycle and/or use public transport to access them. In accordance with policy 3, investments by the Welsh Government will reflect these principles.

The principle of 'Town Centre 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. The impact of COVID-19 on the retail sector is a further driver towards making our town centres multi-functional places. Town centres remain important focal points of communities and are increasingly becoming places to live, centres of community and cultural activity, a focus for public services such as health and education, and the location of new co-working spaces. They are more than the extent of designated retail areas.

Town centres are the most accessible parts of our towns and should be the focus of growth and regeneration. As well as non-residential development, town centres are an appropriate location for new homes. Policy 2 provides the basis for local planning authorities to support intensification in and around town centres. This will support the future of our town centres and provide opportunities for small-scale development, including new housing and mixed-use development.

Commercial, retail, education, health, leisure and public service facilities should be located within town and city centres. This policy applies to developments of a significant scale, which can broadly be defined as where the facility will serve a town, city or region-wide catchment. It is for planning authorities to determine whether a development is considered to be of a significant scale. Planning Policy Wales sets out further requirements under 'Town Centre First' for retail developments.

Planning authorities are encouraged to take a similar approach for smaller developments. It is important for local facilities and homes to be integrated within walkable, mixed-use neighbourhoods, particularly in or adjacent to local centres in accordance with policy 2.

It is important that developments serving a town, city or region-wide catchment are well served by active travel infrastructure and public transport. Ideally this will be utilising existing public transport facilities, but can be achieved through improvements to services or the creation of a new bus route or train station.

A plan-led approach is the best way to identify the location for these facilities. However, in the absence of a development plan allocation, a sequential approach must be used to determine planning applications. The Welsh Government can intervene in the planning application process where a town centre first approach is not being followed.

The policy relates to new developments and does not apply to extensions to existing facilities.



## Policy 7 – Delivering Affordable Homes



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

Through their Strategic and Local Development Plans planning authorities 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, planning authorities should identify sites for affordable housing led developments and explore all opportunities to increase the supply of affordable housing.

### Delivering Homes

Providing housing in Wales at levels which meet our needs is a key priority for the Welsh Government. The planning system must facilitate the provision of additional market and affordable housing. There is a complex picture of housing need and provision with the opportunities people have varying significantly depending on income and where they live in Wales.

The Welsh Government has published a range of 'Estimates of additional housing need (2019-based)' over a twenty year period up until 2038-39 (mid-year to mid year). The figures are available at a national level and for the four regions (the North / Mid Wales / the South West / the South East). Estimates of housing need inform plans and strategies at a national, regional and local level.

The national and regional estimates of need do not reflect future policies or events and are not a Housing Requirement for Wales or the regions. However, the estimates do provide part of the evidence and context on which housing policy and requirements can be based. The estimates of market and affordable housing need should inform the housing requirements set out in Strategic and Local Development Plans and it is expected the housing requirements will differ from the estimates of housing need.

Over the next 20 years (2019 – 2039) the estimate of the additional housing need in Wales, under the central estimate, is around 110,000. During the initial five years (2019-20 to 2023-24) it is estimated that on average 7,400 additional homes will be required annually, with close to two-thirds of these homes needed in South East Wales, just over a fifth in South West Wales and the remaining additional homes largely in North Wales, with only a relatively small number needed in Mid Wales. (The sum of the regional estimates of additional housing need may differ slightly from the Wales estimate.)

The housing need estimates also indicate that the provision of affordable homes should become a key focus for housing delivery. It is estimated over the next five years (2019-20 – 2023-24), under the central estimate, that on average the estimated annual additional homes are split almost equally between affordable housing (social housing or intermediate rent) and market housing. This represents an average of approximately 3,500 (48%) affordable homes and 3,900 (52%) market homes per year over the five year period.

The chart on page 73 illustrates the decline in the delivery of affordable homes and indicates the change in the balance between market and affordable housing which is required over the next five years.

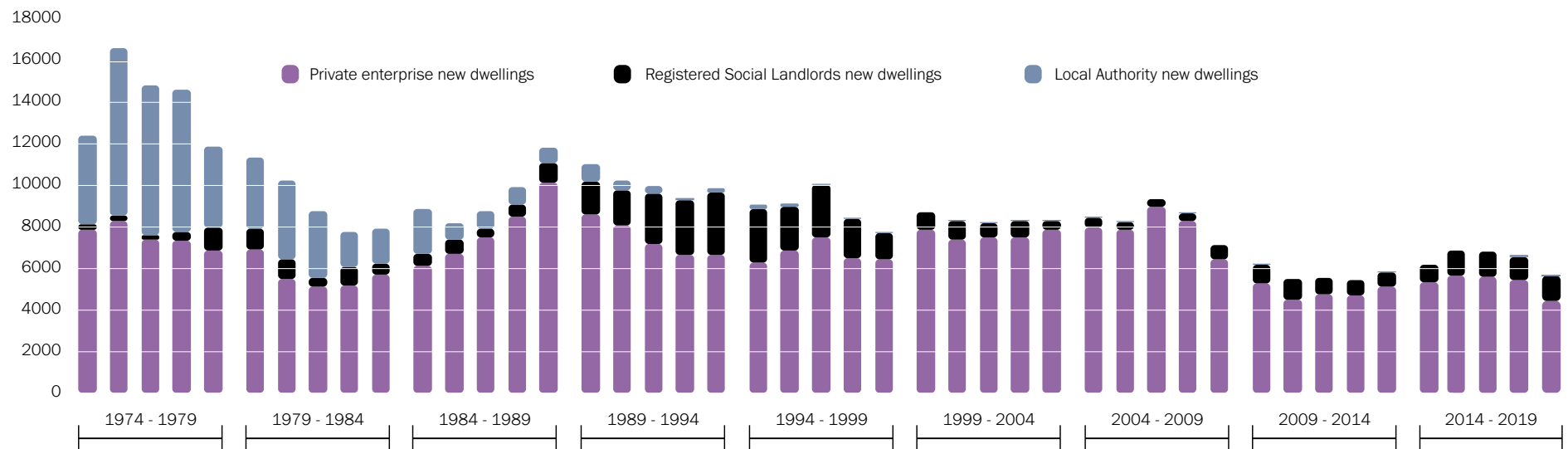
While market housing continues to play a vital and important role in responding to housing need, to address the identified housing need in Wales a shift in the delivery model is required by building affordable homes at scale and pace. As illustrated, the delivery of homes has decreased since greater 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 companies encouraged to build more homes. The reuse of publicly owned land will be important to the delivery of these homes, especially social housing provision (refer to policy 3).

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. Echoing the strategic placemaking principles in policy 2, 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, with a focus on social 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 from the public, private and third sectors to achieve these aims.

### Housing completions 1974–2019: Wales



Source: Information on new dwelling completions 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 8 – Flooding



Flood risk management that enables and supports sustainable strategic growth and regeneration in National and Regional Growth Areas will be supported. The Welsh Government will work with Flood Risk Management Authorities and developers to plan and invest in new and improved infrastructure, promoting nature-based solutions as a priority. Opportunities for multiple social, economic and environmental benefits must be maximised when investing in flood risk management infrastructure. It must be ensured that projects do not have adverse impacts on international and national statutory designated sites for nature conservation and the features for which they have been designated.

### Sustainable development choices

Flood risk is a constraining factor to development, especially as many of our towns and cities are on the coast or located alongside major rivers. The likelihood of rising sea levels and increased rainfall caused by climate change means the risk of flooding is projected to increase over the lifetime of development and sustainable solutions will be required. Flooding can pose a risk to life and has the potential to cause devastating impacts to livelihoods and to property. The Welsh Government therefore has a robust planning policy that directs development away from areas at risk of flooding.

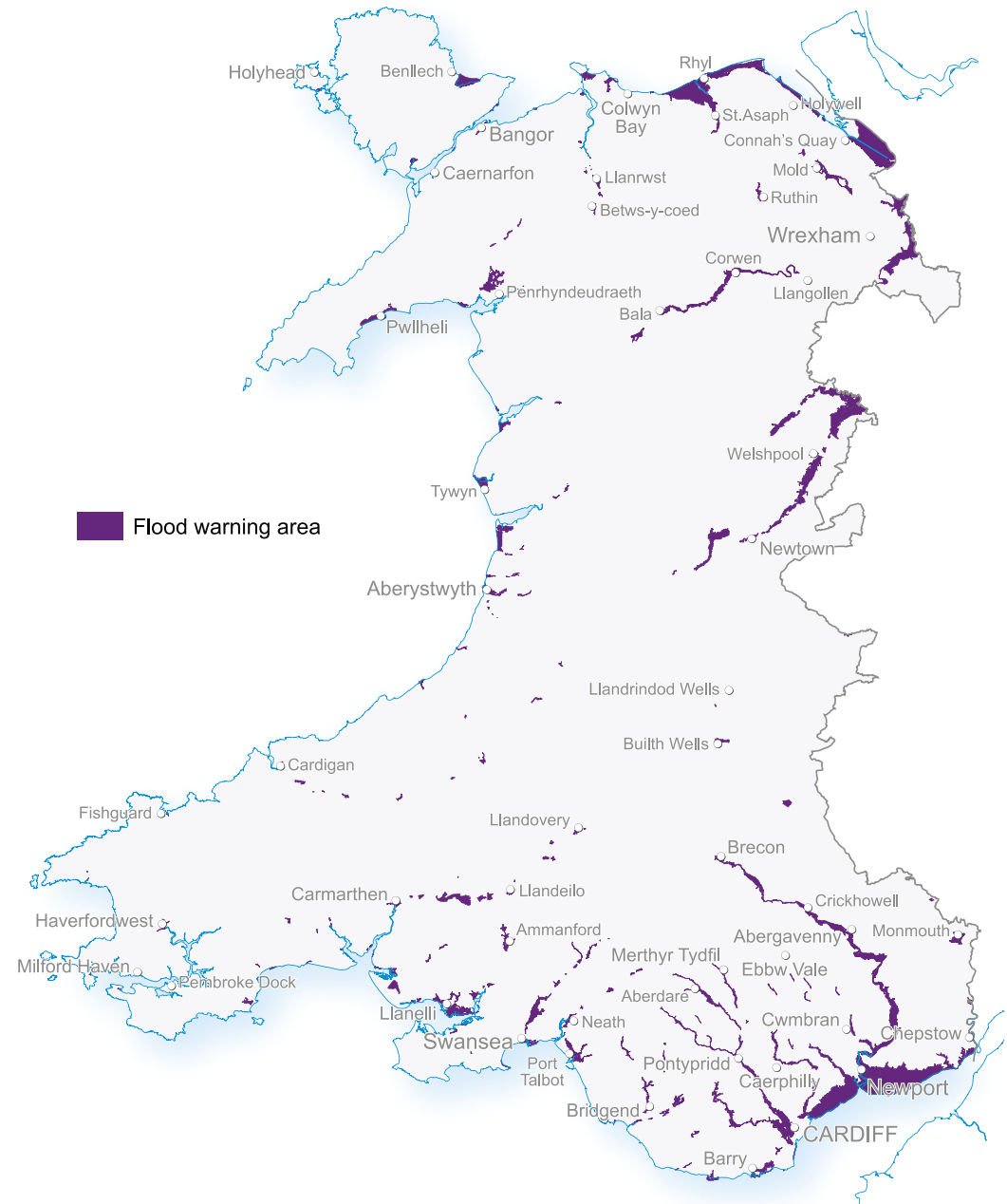
Parts of the three National Growth Areas face flood risks and contain communities located in areas susceptible to flooding from rivers and the sea. The ambition to grow and regenerate places within the National Growth Areas will require strategic decisions on the location of development. It is not appropriate to develop flood risk management infrastructure to enable new development on previously unused land. The Welsh Government and flood risk management authorities will focus

on delivering nature-based schemes and on enhancing existing defences, to improve protection to developed areas. This can enable opportunities for the redevelopment of brownfield land in Growth Areas. The feasibility and public cost of protecting people and property in the short and long terms must be fully considered, with well-being placed at the centre of the decision-making process. It is important that proposals do not cause unacceptable impacts on the surrounding natural environment.

The identification of National and Regional Growth Areas allows the relevant authorities to take a strategic approach to selecting areas to develop. This will mean prioritising places that are not at flood risk, followed by places where flood risk can be managed in an acceptable way. Investments in flood risk management infrastructure when planned and developed on a strategic and catchment basis offer better value and greater benefits. Coastal defences and nature-based solutions on high ground in particular should bring benefits to a wide area and should be planned and delivered on a multi-agency basis.

# Flooding

The Welsh Government favours nature-based flood risk management over engineered solutions wherever possible, working in harmony with aspirations to develop green infrastructure and to provide a net benefit for biodiversity. Flood risk management authorities and other developers of flood risk management infrastructure are required to maximise opportunities to develop multiple public benefits including improved public realm, active travel facilities and securing green infrastructure. Places in flood warning areas are considered at risk of flooding from rivers or the sea.





## Policy 9 – Resilient Ecological Networks and Green Infrastructure



To ensure the enhancement of biodiversity, the resilience of ecosystems and the provision of green infrastructure, the Welsh Government will work with key partners to:

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

Planning authorities should include these areas and/or opportunities in their development plan strategies and policies in order to promote and safeguard the functions and opportunities they provide. In all cases, action towards securing the maintenance and enhancement of biodiversity (to provide a net benefit), the resilience of ecosystems and green infrastructure assets must be demonstrated as part of development proposals through innovative, nature-based approaches to site planning and the design of the built environment.

Planning Policy Wales sets out a range of policies to maintain and enhance biodiversity, promote the resilience of ecosystems, including the stepwise approach, and to maximise the provision of green infrastructure. The strategic focus of Future Wales on urban growth requires an increased emphasis on biodiversity enhancement (net benefit) in order to ensure that growth is sustainable.

In collaboration with our partners, including Natural Resources Wales and local authorities, we require strategic action to safeguard ecological networks and secure biodiversity enhancements (net benefit). We recognise the need to maximise the use of green infrastructure and nature-based solutions as part of shaping urban growth, supporting rural communities and responding to the twin challenges of addressing the climate emergency and reversing biodiversity decline. Effective action should be undertaken at a regional or local level reflecting

individual opportunities. Cumulative action to improve and develop ecological networks and green infrastructure will contribute towards improved national scale resilience.

The Welsh Government is committed to reversing the decline in biodiversity and increasing the resilience of our ecosystems. Resilient ecological networks are vital for nature recovery and are networks of habitat in good ecological condition linking protected sites and other biodiversity hotspots across the wider landscape, providing maximum benefit for biodiversity and well-being. Such networks have existing, or potential for, healthy resilient ecosystems which provide a range of important ecosystem services as well as allowing the movement of species across landscapes in response to climate change. They are diverse, of sufficient scale and extent, in good functional condition and part of connected networks, to enable species and habitats to adapt to disturbance and change.



There is a need to expand and make connections between designated sites to increase the ability of species and ecosystems to adapt to the pressures of climate change and pollution. While protected sites are critically important to the long term resilience of our ecosystems, they should not be seen as islands within the landscape, but should instead form the nodes of large-scale resilient and functional ecological networks and green infrastructure. In this context, the species and habitats of principal importance identified under Section 7 of the Environment (Wales) Act 2016 are a key driver of habitat restoration and creation.

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. Any actions should:

- contribute to their long-term resilience;
- contribute to the wider resilience of ecological networks;
- protect and enhance ecosystems services; and
- ensure the provision of green infrastructure for social, cultural and economic benefits.

Safeguarding will 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 compromised by development. Safeguarding should in the first instance be undertaken at a large scale, reflecting the landscape scale approach advocated by the Welsh Government's Natural Resources Policy. Safeguarding does not prohibit development, but sets out a requirement to

consider both the long-term land needs of the habitats and species it is intended to protect and improve, and the present and predicted future needs for ecosystem services and functions.

Safeguarding enables dynamic responses and long-term actions. This is important because it is not always possible to be certain or prescriptive about the most sustainable approach to take in any given case. Safeguarding enables the planning system to take action which can complement wider approaches to promote the sustainable management of natural resources. When coupled with more specific allocations for habitat creation or green infrastructure, it will mean positive action to reverse biodiversity decline, address the climate emergency and provide wider social, cultural and economic benefits can be achieved at all scales.

Areas may be safeguarded for a wide variety of reasons. These include increasing the resilience or connectivity of certain habitat types, such as species rich meadows, or creating habitat such as woodland, or for the provision of green infrastructure. Overall, safeguarding areas should contribute towards the sustainability of key ecosystem services such as flood water regulation, tourism and recreation, and physical and mental well-being. As part of a green infrastructure assessment, broad opportunities for habitat protection, restoration or creation and the provision of green infrastructure may be specified as part of identifying areas to be safeguarded or may take the form of more specific allocations. This may be achieved, for example, through the provision of buffer areas around protected sites or stepping stones connecting habitats or through the identification of green infrastructure in and around urban areas.

As the population of Wales becomes increasingly urban, the opportunity to optimise well-being benefits from green infrastructure will be greatest in and around these areas. Innovative use of nature-based solutions and integrating green infrastructure in and around urban areas can help restore natural features and processes into cities and landscapes. Providing locally accessible, high quality green spaces and corridors helps to maintain and enhance the strategic functioning of our natural resources and ecological networks and address physical and mental well-being. Local green infrastructure assets such as public rights of way, common land, parks, village greens and allotments can all make a cumulative contribution towards wider national scale ecological connectivity. The real-life importance of urban green spaces was demonstrated when people were restricted to taking exercise in immediately local green spaces during the COVID-19 lockdown.

Local authorities must work together and, along with Natural Resources Wales and stakeholders, provide green infrastructure and safeguarding sites within and beyond their administrative boundaries. Safeguarded areas and any specific allocations should be identified through the green infrastructure assessment and set out in the relevant development plan.

### **Ecological networks and green infrastructure mapping**

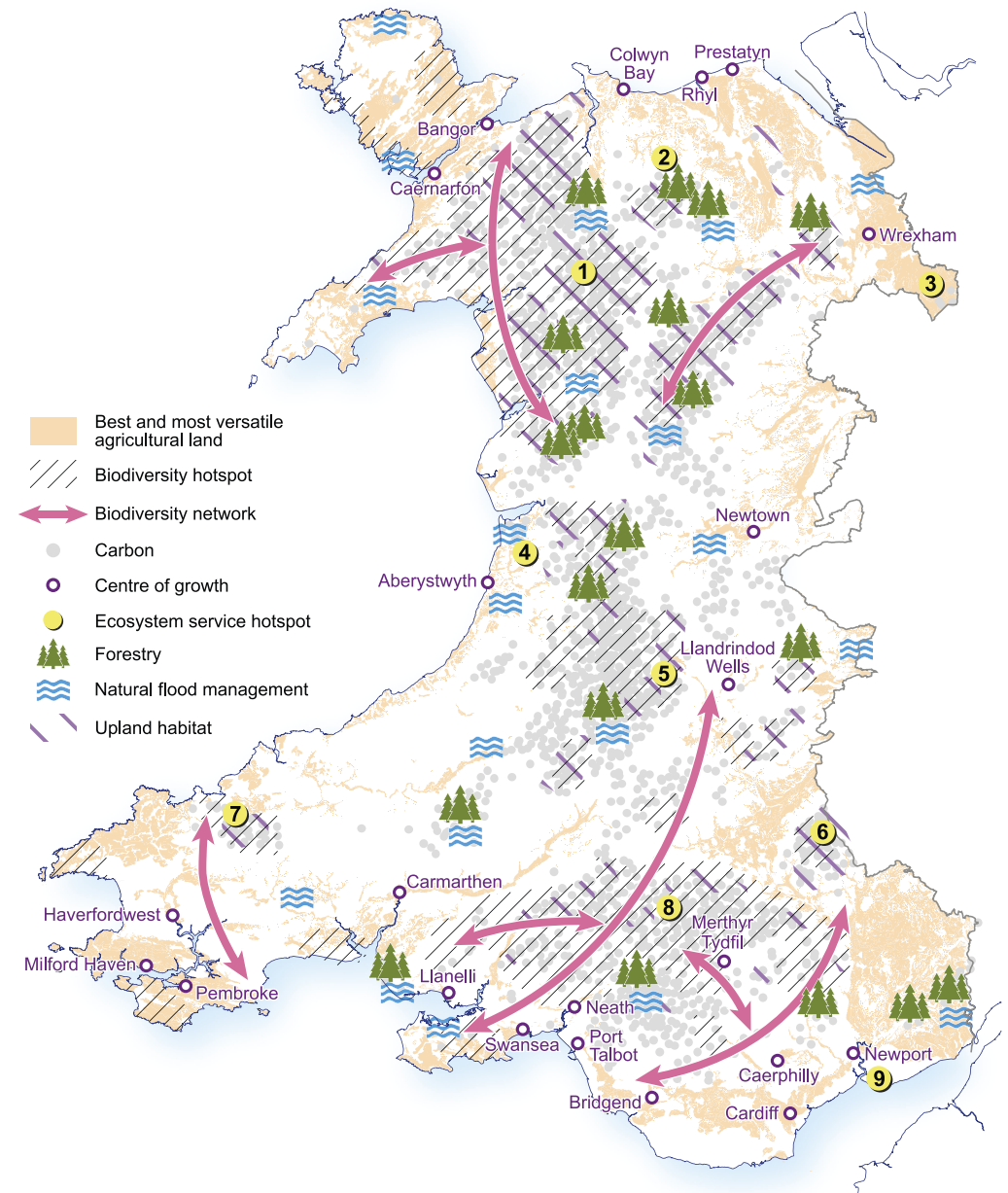
Indicative maps produced by Natural Resources Wales illustrate national natural resources themes including ecological networks, biodiversity hotspots, ecosystem services and opportunities for habitat creation. The maps provide the starting point for considering resilience of ecological networks for nature recovery and enhancement (net benefit) as part of green infrastructure assessments. They are a means to ensure that cumulative action is taken to secure enhancement as part of proposing sustainable growth and development proposals.

Area Statements develop this approach by identifying key challenges and opportunities to strengthen ecological networks and ecosystem services. They provide local scale evidence and mapping of key environmental themes, and identify areas where 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. Plans should also protect and enhance their identified key ecological functions and features.

Regional and local interventions collectively contribute towards increasing the resilience of our national ecological networks. Strategic and Local Development Plans must be informed by green infrastructure assessments and contribute to these aims through appropriate policies.

# National Natural Resources

- 1 Snowdonia holds some of the most important upland habitats in the UK. These habitats store and sequester carbon, hold water for flood alleviation, and help provide clean, fresh water. They provide a pollinator resource and are a key area for recreation.
- 2 Upland blanket bog and heathlands around Mynydd Hiraethog and Llandegla mountain together with ancient woodlands support multiple ecosystem services. These include carbon sequestration and storage to help mitigate climate change and enhance water quality.
- 3 The wooded banks and areas of ancient woodland around the tributaries of the River Dee play a significant role in stabilising the river and helping prevent soil erosion into the streams. Food production is also a key service here. Fenn's and Whixall moss is here.
- 4 Ceredigion's countryside provides multiple services. Some of the most significant sites for ecosystem service generation are Cors Caron and Cors Fochno raised bogs, which store carbon and water and provide biodiversity.
- 5 The Cambrian mountains are a key area for fresh water provision into England, as well as a place of water storage. They are also significant for the sequestration and storage of carbon, both in the soil and in woodlands.
- 6 The wooded valleys and the upland heathlands of the Black Mountains support multiple ecosystem services, including carbon sequestration and storage to help mitigate climate change, water quality enhancements and the habitats help prevent flooding.
- 7 The Preseli hills and the woodlands of northern Pembrokeshire provide multiple ecosystem services from flood alleviation, carbon storage and sequestration through to recreation and food provision.
- 8 The Brecon Beacons contains a range of dynamic natural ecosystems which provide multiple benefits, including water regulation to help flood prevention and water purification.
- 9 The Gwent Levels are an ancient landscape with a special cultural significance. This area is also important for biodiversity, recreation, flood alleviation, carbon storage and food production.







## Policy 10 – International Connectivity



The Welsh Government identifies the following Strategic Gateways to facilitate international connectivity:

- Cardiff Airport
- Holyhead Port
- Haven Waterway, including the Ports of Milford Haven and Pembroke Dock
- Fishguard Port

The Welsh Government will work with the operators, investors and local authorities to support Strategic Gateways and maintain their international connectivity roles. Strategic and Local Development Plans should support the Strategic Gateways by maximising the benefits they provide to their respective regions and Wales. New development around the Strategic Gateways should be carefully managed to ensure their operation is not constrained or compromised.

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### A connected society and economy

The new Wales Transport Strategy sets out the Welsh Government's vision, priorities and desired outcomes for transport. It is aligned with Future Wales and supports the spatial strategy which directs where new development and infrastructure investment will be focused. A National Transport Delivery Plan will support the delivery of the Wales Transport Strategy and Future Wales.

Future Wales and the Wales Transport Strategy should be used together and an integrated approach taken to their implementation at the regional and local levels. This is critical to ensure new development is built in sustainable locations and supported by the active travel and public transport infrastructure and services required to enable people to live active and healthy lives. Taking an integrated approach is also key to ensuring new development provides the critical mass of people needed to help fund and sustain infrastructure and services, as well as ensuring average levels of airborne pollution continue to be reduced.

### Connecting Wales to the World

The Strategic Gateways are critical to the effective movement of people and cargo as part of networks or supply chains within their respective regions, Wales and the UK. They have been identified due to their international connectivity, scale and the roles they play within the economy of Wales. Strategic and Local Development Plans should maximise the opportunities which support growth across the respective regions and Wales.

The Welsh Government will support appropriate development which can enhance international connectivity and can be accommodated within statutory climate change targets and carbon budgets. The Welsh Government acknowledges that the statutory climate change framework implies action to tackle all sources of greenhouse gas emissions, including international travel and freight. The Welsh Government supports international efforts to reduce emissions from international aviation and shipping. The net Welsh emissions account includes Wales' share of emissions from international aviation and shipping. Decisions associated with international aviation and shipping will therefore need to demonstrate how they can be accommodated within the statutory climate change targets and carbon budgets.







### Cardiff Airport

Cardiff Airport is an essential part of Wales' strategic transport infrastructure. It is an international gateway connecting Wales to the world and is an important driver within the Welsh economy.

Cardiff Airport is located within the Cardiff Airport and Bro Tathan Enterprise Zone which offers opportunities for investment in the site and surrounding areas. The Enterprise Zone offers a wide range of development sites and business accommodation, providing opportunities for the development of bespoke facilities or investment in existing accommodation.

### Ports

Holyhead Port, Haven Waterway and Fishguard Port have been identified as Strategic Gateways due to their essential roles in the international movement of imports and exports and as key transport infrastructure between land and sea. They are an essential part of the local, regional, national and international economy, providing international connectivity for Wales and the UK. They play a strategic role in transporting people and freight; provide logistical and service hubs for industry; and offer further growth opportunities for tourism and recreation activity. They are active in the cruise market and can be the first experience people have of visiting Wales.

The Welsh Government recognises the importance of **Holyhead Port** to Anglesey and the region, and it is the most direct strategic link between Wales and Ireland. Holyhead Port is a major national asset and an important international gateway for freight and passengers. The Port has deep water port facilities, existing accommodation and development opportunities. The Inner Harbour, Salt Island and the Outer

Harbour offer marine, leisure, transport, energy (see policy 24), cruise and other business opportunities with good road and rail links across the region and into England.

The **Haven Waterway**, which includes the ports of Milford Haven and Pembroke Dock, is a major national asset and an important international gateway for freight and passengers. The Waterway has a unique combination of a natural harbour, long established industries and the potential for new strategic development. It has one of the finest deep waterways in the world and represents a strategically important link from the region, Wales and the UK to Ireland and the rest of the world.

The Waterway is a leading UK shipping gateway handling liquid, bulk, break bulk and heavy lift cargoes. It handles a significant amount of the UK's oil, gas and electricity needs. A diverse high-skill supply chain has developed locally to support the energy sector which is increasingly incorporating the renewable energy sector and, in particular, marine energy (see policy 32). It offers diverse development opportunities, including light and heavy industry, offices and warehousing, with good rail infrastructure, including dedicated freight lines to waterside locations.

**Fishguard Port** is an important international gateway for freight and passengers in the South West and provides a key roll-on roll-off ferry link. It has a strategically important role in connecting the mainland of Europe, the UK and Wales with Ireland.





## Policy 11 – National Connectivity



The Welsh Government will support and invest in improving national connectivity. Our priorities are to encourage longer-distance trips to be made by public transport, while also making longer journeys possible by electric vehicles. The Welsh Government will work with Transport for Wales, local authorities, operators and partners to support the delivery of the following measures to improve national connectivity:

- Rail Network – Transform the rail network and improve the quality of rail services for passengers.
- Bus Network – Invest in the development of the national bus network, fully integrated with regional and local bus networks, to increase modal share of bus travel and improve access by bus to a wider range of trip destinations.
- Strategic Road Network – Invest in road improvements to reduce journey times, deliver a safer and more resilient road network, and improve air and noise quality. Create a network of rapid-charging points to enable longer distance travel by electric vehicles throughout Wales.
- National Cycle Network – Revitalise the National Cycle Network to create a network of traffic-free paths connecting cities, towns and countryside across Wales.

Planning authorities should support developments associated with improvements to national connectivity and, where appropriate, maximise the opportunities that arise from them.

Planning authorities must ensure that, where appropriate, new development contributes towards the improvement and development of the National Cycle Network and key links to and from it.



## Policy 12 – Regional Connectivity



The Welsh Government will support and invest in improving regional connectivity. In urban areas, to support sustainable growth and regeneration, our priorities are improving and integrating active travel and public transport. In rural areas our priorities are supporting the uptake of ultra-low emission vehicles and diversifying and sustaining local bus services.

The Welsh Government will work with Transport for Wales, local authorities, operators and partners to deliver the following measures to improve regional connectivity:

- Active Travel – Prioritising walking and cycling for all local travel. We will support the implementation of the Active Travel Act to create comprehensive networks of local walking and cycling routes that connect places that people need to get to for everyday purposes.
- Bus – Improve the legislative framework for how local bus services are planned and delivered. We will invest in the development of integrated regional and local bus networks to increase modal share of bus travel and improve access by bus to a wider range of trip destinations.
- Metros – Develop the South East Metro, South West Metro and North Wales Metro. We will create new integrated transport systems that provide faster, more frequent and joined-up services using trains, buses and light rail.
- Ultra-Low Emission Vehicles – Support the roll-out of suitable fuelling infrastructure to facilitate the adoption of ultra-low emission vehicles, particularly in rural areas.

Planning authorities must plan the growth and regeneration of the National and Regional Growth Areas to maximise opportunities arising from the investment in public transport, including identifying opportunities for higher density, mixed-use and car-free development around metro stations.

Active travel must be an essential and integral component of all new developments, large and small. Planning authorities must integrate site allocations, new development and infrastructure with active travel networks and, where appropriate, ensure new development contributes towards their expansion and improvement.

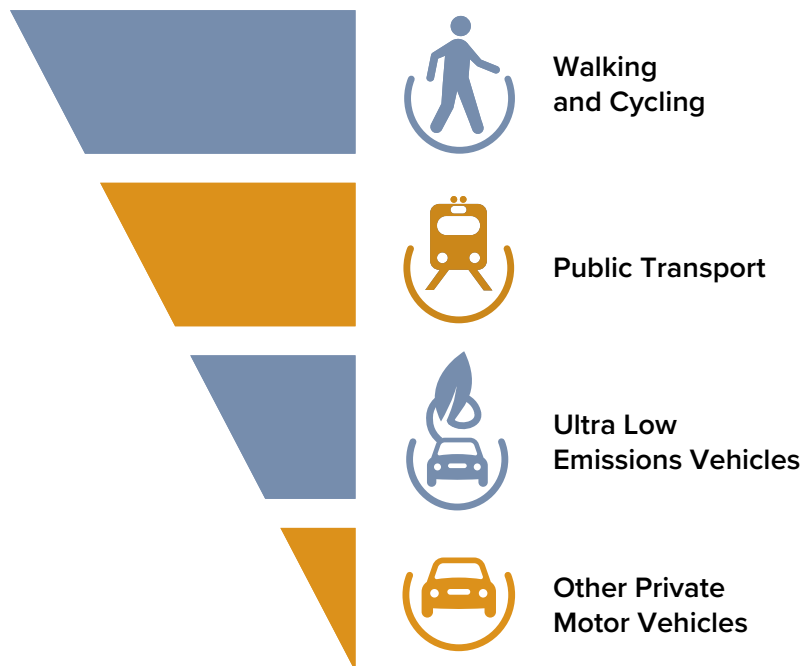
Planning authorities must act to reduce levels of car parking in urban areas, including supporting car-free developments in accessible locations and developments with car parking spaces that allow them to be converted to other uses over time. Where car parking is provided for new non-residential development, planning authorities should seek a minimum of 10% of car parking spaces to have electric vehicle charging points.

## Travelling in Wales

The national and regional connectivity policies set out the measures the Welsh Government will support and invest in to improve connectivity. These measures will improve connectivity between the north and south, as well as east-west connectivity in the north, the south and mid Wales.

The Welsh Government's aim is to reduce the need to travel, particularly by private vehicles, and support a modal shift to walking, cycling and public transport. The sustainable transport hierarchy in Planning Policy Wales, which prioritises active travel and public transport, is a fundamental Welsh Government principle that underpins Future Wales.

### The Sustainable Transport Hierarchy for Planning



Transport in Wales is currently dominated by the car. Our reliance on travelling by car is limiting the opportunity for physical activity and social contact to be built into people's everyday lives and is exacerbating air and noise pollution, particularly along major routes and at busy destinations. This has an adverse impact on people's health and well-being, contributing to life-limiting illnesses associated with physical inactivity, loneliness and isolation. This is also exacerbating health disadvantages for certain groups such as the elderly, those caring for young children, children themselves, people with disabilities and people in poverty. Road transport is a major cause of air and noise pollution and it accounts for the vast majority of greenhouse gas emissions produced from the transport sector. The changes in the way people moved around towns and cities during the COVID-19 pandemic are a sign of the widespread potential to reduce our use of cars and to allocate more space for walking and cycling. We will also be making 20mph the new default speed limit for most streets.

The Welsh Government will be investing significantly to improve active travel and public transport. This needs to be combined with the implementation of policies in Planning Policy Wales which require development to be directed towards sustainable locations and designed to make it possible for everyone to make sustainable and healthy travel choices for their daily journeys. It will also require planning authorities to refuse planning permission for car-dependent developments which would otherwise encourage car use and undermine sustainable travel.

### **Developing Active Travel**

The Active Travel (Wales) Act 2013 seeks to bring about a substantial increase in active travel and forms a key driver in the delivery of the Welsh Government's ambition to create sustainable places where people can walk and cycle as

part of their everyday activity. Since the Act was made, local authorities have developed plans for active travel networks for their area. The Active Travel Network Maps are a tool for local authorities to enhance their forward planning of active travel and should be used to inform, as well as be informed by, the location and design of new development. Though providing mostly for short local journeys, particularly with the uptake of e-bikes, local active travel networks can impact upon movement patterns and travel behaviour beyond local authority boundaries at a regional scale.

The National Cycle Network is a network of signed cycle routes. As well as people on bikes, the routes are also used by walkers, joggers, wheelchair users and horse riders. Sustrans has worked with partners and stakeholders, including the Welsh Government, to develop the following shared vision for the National Cycle Network:

- **A UK-wide network of traffic-free paths for everyone, connecting cities, towns and countryside and loved by the communities they serve.**

There are 1,690 miles of National Cycle Network routes in Wales. 64% of the network is on-road and 36% is on traffic-free paths. The network connects Cardiff, Newport, Swansea, Aberystwyth, Bangor and the north Wales coast, as well as running through all three National Parks. It passes within a mile of almost 60% of the population and connects communities with workplaces and services, making safe, healthy, low-cost travel to work an option for many people. A comprehensive review of the entire National Cycle Network has been undertaken and an action plan developed. This defines the state of the network in Wales and outlines the strategic priorities for improvements. Network development plans set out more detailed, long-term plans for developing and upgrading the network.



Planning authorities must safeguard routes within Active Travel Network Maps and the National Cycle Network and, wherever possible, integrate them within new developments. Planning authorities should also work together to identify existing and potential cross-boundary routes within Strategic and Local Development Plans to enable longer distance journeys by bike. Where routes within Active Travel Networks and the National Cycle Network will provide part of the supporting infrastructure for new developments, planning authorities must seek to secure their provision or improvement as part of developments through the planning process, using planning obligations where necessary.

Statutory Active Travel Guidance must be used to inform the design of movement networks, streets and active travel routes within development sites and any connecting routes delivered as part of a planning permission.

### **Improving public transport**

The Welsh Government's ambition is to provide an integrated public transport network that is safe, reliable, punctual, environmentally sustainable and accessible, and that meets the needs of the travelling public. We want to see more people using public transport to get them where they need and want to be, quickly and on time.

Our rail infrastructure and services are fundamental to an effective and efficient transport network and central to national connectivity across Wales and its regions. Their continued development and expansion will contribute to the ambition to develop a stronger, inclusive and more equitable economy and to deliver prosperity for all by connecting people, communities and businesses across Wales to jobs, services and markets. Working with Transport for Wales, we will turn stations into vibrant community hubs, providing essential local services and space

for small businesses to flourish. The Welsh Government will also improve the legislative framework in Wales for how local bus services are planned and delivered.

The Welsh Government promotes transit orientated development, focusing higher density and mixed-use development around public transport stations and stops. The metro projects, which 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.

Investment in public transport will enable more people to live without needing to own or use a car. Planning authorities should promote car-free and low car developments in accessible locations. Planning authorities should also challenge perceptions that housing needs to be built with parking on plots, which promotes car-dominated developments, and promote different ways of dealing with cars that encourage a reduction in car use and increase active travel and use of public transport.

### **The transition to low emission vehicles**

The Welsh Government will embrace the adoption of electric vehicles in an inclusive manner, supported by the necessary investment in charging infrastructure. We recognise this will be a greater challenge in rural areas. We are also promoting an increase in the generation of renewable energy to support the increased demand for electricity. The Welsh Government will increase the use of electric vehicles in public sector fleets, as well as encouraging innovative approaches to reducing emissions in all transport sectors.

Battery electric vehicles currently offer the most immediate route to the transition away from petrol and diesel vehicles to zero and ultra-low emission vehicles. 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. However, there is also an important role for the public sector to intervene where the market does not provide the necessary infrastructure, particularly in rural areas. The Welsh Government will set out how we will support the uptake of electric vehicles in our Electric Vehicle Charging Strategy. We will also keep under review the pace and geography of the delivery of charging infrastructure and ensure that no parts of Wales are left behind in this transition. The Welsh Government is also working with energy network operators to develop the electricity grid infrastructure to support increased use of electric cars, as well as the electrification of the rail network.

Other forms of electric and ultra-low emission vehicles are also being developed. The role of hydrogen fuel cell electric vehicles and biofuels are being considered. These technologies have challenges to address such as cost reduction and sustainability of fuels and the Welsh Government will support innovation and work with industry, academia and the public sector to develop new opportunities.

New development needs to be adaptable to changing circumstances. Changes in transport technology offer the opportunity to change the way in which we travel, with the advent of driverless cars offering the potential to transform attitudes towards private car ownership, especially within and close to our major urban areas. Whilst we do not know what the future holds, the location and design of car parking should enable conversion to other uses over time.

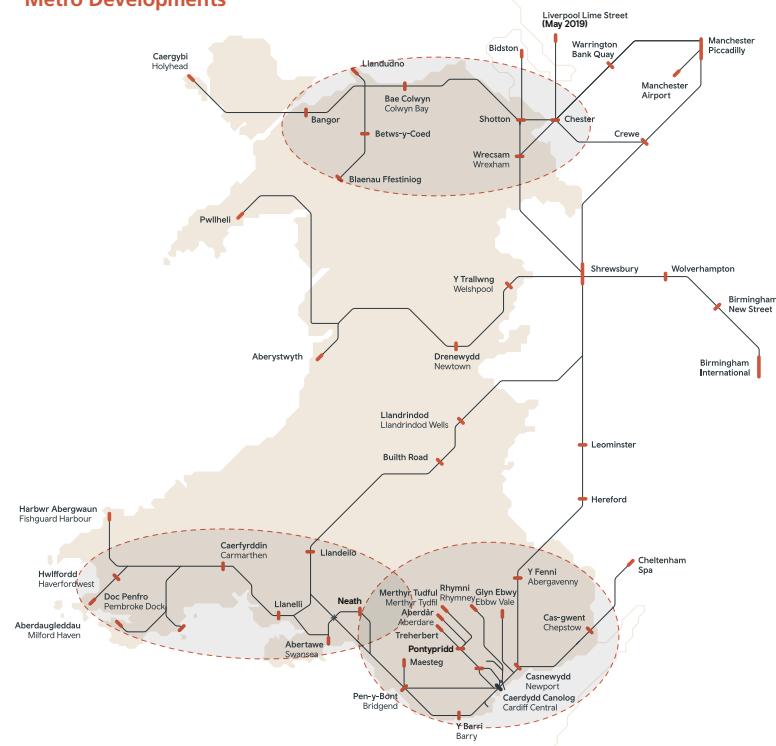
When requiring electric vehicle charging points, planning authorities should ensure the level, location and type of provision is appropriate to the scheme and local circumstances. It may be appropriate for some of the provision to be 'passive', with the necessary underlying infrastructure provided to enable installation and activation in the future. Planning authorities should take a strategic approach to electric vehicle charging in their area and, where appropriate, develop policies in their development plan and specific local requirements. The provision of electric vehicle charging infrastructure points should be planned as part of the overall design of a development.

The Welsh Government is committed to tackling congestion on the strategic road network. The Welsh Government will invest in road improvements to reduce journey times between east and west Wales, as well as between the north and south. The Pinch Point Programme delivers small-scale interventions to address congestion pinch points on the main road network, including along the A55. The South East Wales Transport Commission has advised on ways to tackle congestion on the M4, which support the policies in Future Wales.

### **Developing infrastructure responsibly**

Planning Policy Wales contains the planning policy framework for addressing air quality, soundscape and noise. When proposing new transport infrastructure or new development, average population exposure to air and noise pollution should be reduced and soundscapes improved where it is practical and feasible to do so. At the very least, exposure to pollution should be minimised. This will include taking into account the long-term effects of current and predicted levels of air and noise pollution on individuals, society and the environment arising as a result of proposals for transport infrastructure or development.

## Metro Developments



### South West Wales Metro

- The South West Wales Metro including rail, bus, and active travel is currently being developed by the region's local authorities
- Increased South Wales Mainline services (to Carmarthen and Pembroke Dock/ Milford Haven) and a potential strategic West Wales Parkway
- Assessment of the case to reopen older lines and new stations such as Dulais, Amman, Neath and Swansea Valleys

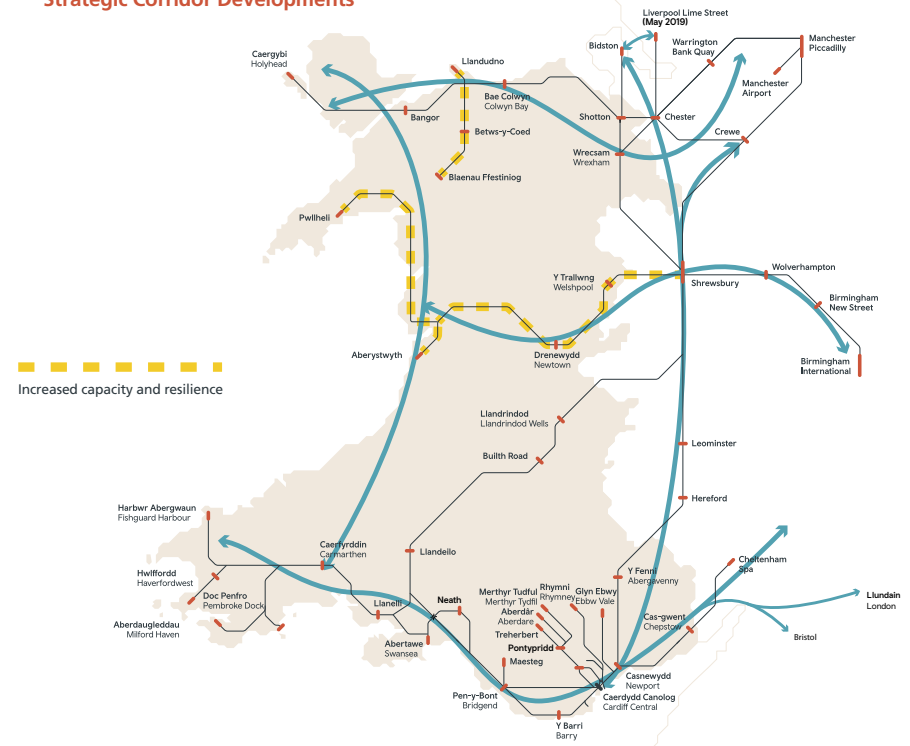
### North Wales Metro

- Enhance and integrate rail and bus services across North Wales/Cheshire
- Enhanced Borderlands line with direct and faster services between Wrexham and Liverpool and integration with Merseyrail services
- Additional stations and potential extensions
- Upgrades of Wrexham General and Shotton stations
- Further rail extension and/or re-openings to be considered

### South East Wales Metro

- To appraise, develop & deliver major schemes such as Ebbw Valley and Maesteg service frequency enhancements
- Potential M4 corridor measures
- Enhanced services and new stations on the Marches Line
- Additional Metro stations
- Network capacity & resilience measures
- Comprehensive integration with bus services and Active Travel
- Other new transport solutions including reopening and delivering new lines through the emerging Metro Enhancement Framework

## Strategic Corridor Developments



### South Wales Mainline

- More services to enable mix of express and stopping services from London and Bristol Temple Meads across South Wales to Pembrokeshire
- Improved journey times: Cardiff-London 85 minutes, Cardiff-Swansea 30 mins, Cardiff-Bristol Temple Meads 35 mins, Carmarthen-Cardiff 75mins
- TEN-T standards, including electrification, gauging and line speed improvements

### North Wales Mainline

- More services to enable a mix of express and stopping services across North Wales and to/from Holyhead, Bangor, Llandudno to Liverpool, Manchester, Chester, Crewe, etc
- Improved journey times: Llandudno-Crewe 60 mins, Holyhead-Chester 60 mins
- TEN-T standards, including electrification, gauging and line speed improvements
- Future HS2 compatible operation

### North-South Connectivity

- Enhanced connectivity from Ynys Môn to Bangor, Caernarfon, through Dolgellau, Aberystwyth and to Swansea Carmarthen and South West Wales
- This may include upgraded lines, reopened lines and new lines – as well as integration with bus services

### East-West Connectivity

- More capacity and shorter journey from the West Midlands through Shrewsbury & Mid- Wales to Aberystwyth

### Marches Line

- A major upgrade of the existing Marches line to enable more and faster services enabling a mix of express and stopping services







## Policy 13 – Supporting Digital Communications



The Welsh Government supports the provision of digital communications infrastructure and services across Wales.

Planning authorities must engage with digital infrastructure providers to identify the future needs of their area and set out policies in Strategic and Local Development Plans to help deliver this.

New developments should include the provision of Gigabit capable broadband infrastructure from the outset.

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## Policy 14 – Planning in Mobile Action Zones



The Welsh Government supports increased mobile phone coverage and the associated economic and social benefits it brings.

The Welsh Government will identify Mobile Action Zones, showing locations where there is little or no mobile telecommunications coverage.

The Welsh Government, planning authorities and mobile telecommunications operators must work together to achieve increases in mobile coverage within Mobile Action Zones.

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### Changing technology: digital infrastructure

The Welsh Government supports the roll-out of digital communications infrastructure across Wales. Modern, reliable mobile telecommunications and fast broadband services are essential to our everyday lives, as highlighted by the number of people working and learning from home during the COVID-19 pandemic. Digital communications infrastructure is crucial to the future success and economic competitiveness of Wales' businesses and supports community and individual needs, including access to key services and facilities.

In rural areas the provision of both mobile telecommunications and broadband infrastructure is particularly important where topography, physical distance and sparse distribution of

population make the roll-out of infrastructure and access to key services and facilities difficult. Little or no coverage in some locations disadvantages businesses, communities and individuals, both economically and socially, and can contribute to deprivation, social isolation and lack of well-being. Planning authorities should consider the potential impact of poor coverage on different groups and plan positively to overcome these issues, setting out policies in Strategic and Local Development Plans to aid infrastructure delivery. The Welsh Government supports the provision of new and improved digital communications infrastructure across Wales and recognises that infrastructure in rural areas should be carefully planned to mitigate any environmental impact on sensitive or designated landscapes.

The Welsh Government, planning authorities and digital communications infrastructure providers must work together to ensure both mobile telecommunications and fast broadband infrastructure and services are provided. The Welsh Government's fast broadband roll-out will improve coverage to business and domestic premises across Wales. Mobile Action Zones will help create the right environment to achieve increases in mobile telecommunications coverage where there is currently little or no service, predominantly in selected parts of rural Wales.

Due to the essential nature of broadband in modern society, the Welsh Government supports the provision of Gigabit capable digital infrastructure into new developments. Typically this will apply to developments where people are present, for example new housing, business and commercial premises, and public buildings. Local Development Plans should include policies to help deliver this.

'Gigabit capability' will for the most part be fibre, but could also include fixed wireless access. For the former this will mean that the developer will need to install underground ducting to allow the communications provider to install fibre to connect easily with residents and businesses, and for fixed wireless infrastructure the communications provider may need to erect a mast and/or install small antennae. This helps negate the need to retro-fit developments in the near future to accommodate fibre or any new technologies that arise.

Planning authorities must also be alert and responsive to the positive effects of forthcoming 5G services and Gigabit broadband and other such technologies. They should work with infrastructure and service providers to consider the potential impacts of these technologies and the needs of business, public services, communities and individuals. These issues should be addressed in Strategic and Local Development Plans.

The Welsh Government supports the need to increase mobile phone coverage and to ensure all parts of Wales are supported by the mobile telecoms infrastructure they need. The identification of Mobile Action Zones identifying areas of little or no coverage will highlight areas, many of which will be rural in nature, where there is demand for new infrastructure and provide a focus for action.

Mobile Action Zones will focus on mobile 'not-spots' or clusters of not-spots where a useable outdoor 4G coverage is unavailable from any operator and where there is demonstrable latent demand for mobile connectivity. The Zones will be created in areas demonstrating the greatest latent demand for 4G mobile phone connectivity. Latent demand will be based on a number of criteria, including the number of homes and businesses, transport networks and tourism sites. The scale and shape of the Zones will be based on not-spots themselves and the location of the criteria outlined above.





## Policy 15 – National Forest



The Welsh Government is committed to developing a national forest through the identification of appropriate sites and mechanisms. Action to safeguard proposed locations for the national forest will be supported.

### A healthier Wales: more woodland

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, to provide places for recreation and well-being and to ensure that the productive potential of Welsh woodlands is maintained.

The Welsh Government has 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 national forest will comprise of three strands:

- Quality environment which comprises connected ecosystems, biodiversity and habitats, restoration of undermanaged woodland and ancient woodland;
- Productive woodland; and
- Community woodland.

The forest will be a national asset which could provide jobs in productive forestry, leisure, tourism and other sectors. Tree planting has a positive role to play in water and flood risk management and climate adaptation and mitigation. The forest or woodland sites will be dispersed across a number of locations and will act as a catalyst for improving land in need of regeneration. Infrastructure or development proposals which require planning permission and

forming part of this project will be supported. 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.

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. The planning system can support tree planting as part of development proposals and means such as section 106 agreements may be utilised for the aim of increased tree coverage across Wales.

Woodland expansion is an example of habitat and species creation. Reforestation should not compromise wider ecosystem resilience.



## Policy 16 – Heat Networks



Within Priority Areas for District Heat Networks planning authorities should identify opportunities for District Heat Networks and plan positively for their implementation.

Large scale mixed-use development should, where feasible, have a heat network with a renewable / low carbon or waste heat energy source. Planning applications for such development should prepare an Energy Masterplan to establish whether a heat network is the most effective energy supply option and, for feasible projects, a plan for its implementation.

### Power and heat for sustainable places

Future Wales' spatial strategy places a strong emphasis on the need to make the best use of our resources. National and Regional Growth Areas and the ambitions for enhanced transport infrastructure 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.

### Heat Networks

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. Waste heat (such as energy from waste plants) can be an effective, efficient fuel source. Heat networks can vary in size from a single block of flats, two buildings sharing a single heat source or wider areas of multiple buildings forming a District Heat Network.

The Welsh Government supports the establishment of District Heat Networks as part of delivering the urban growth focus of the spatial strategy. 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 the map on the following page. Although heat networks are supported in principle wherever they are viable, these are the areas considered to have the greatest potential for heat networks.

The areas 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 heat networks.

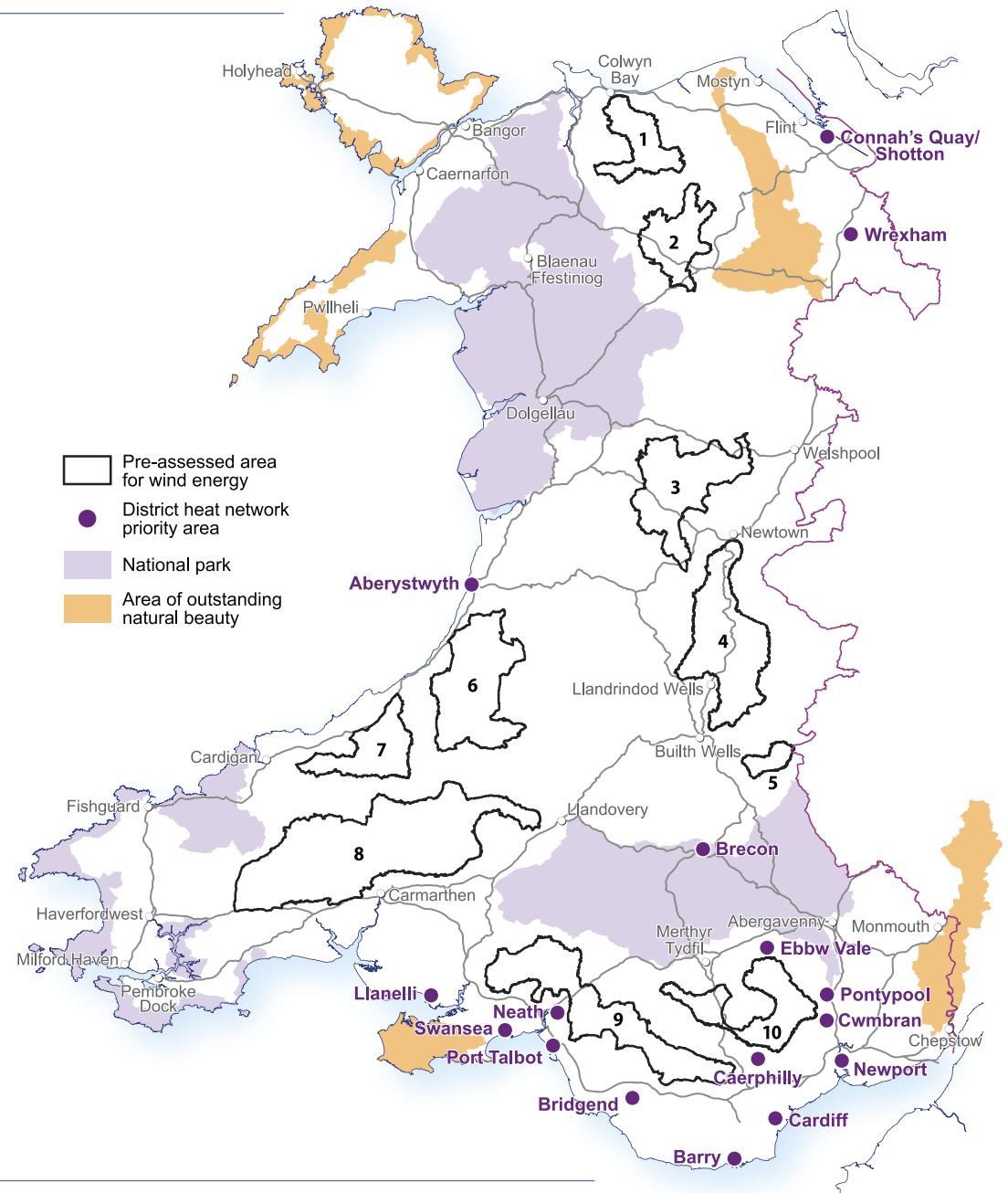
Planning authorities should explore and identify opportunities for District Heat Networks, particularly in the Priority Areas, and seek to develop city or town-wide District Heat Networks in as many locations as possible.

As a minimum, proposals for large-scale, mixed-use developments of 100 or more dwellings or 10,000sqm or more of commercial floorspace should consider the potential for a heat network. However there is also potential for heat networks below this threshold and developers and planning authorities should explore these opportunities wherever possible.

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

## Wind Energy and Heat Networks

Wales' topography and prevailing weather conditions present many opportunities to generate energy from the wind without harming our cherished protected landscape areas. The density of some of our towns and cities are also ideal for using heat networks to warm our buildings and water.







## Policy 17 – Renewable and Low Carbon Energy and Associated Infrastructure



The Welsh Government strongly supports the principle of developing renewable and low carbon energy from all technologies and at all scales to meet our future energy needs.

In determining planning applications for renewable and low carbon energy development, decision-makers must give significant weight to the need to meet Wales' international commitments and our target to generate 70% of consumed electricity by renewable means by 2030 in order to combat the climate emergency.

In Pre-Assessed Areas for Wind Energy the Welsh Government has already modelled the likely impact on the landscape and has found them to be capable of accommodating development in an acceptable way. There is a presumption in favour of large-scale wind energy development (including repowering) in these areas, subject to the criteria in policy 18.

Applications for large-scale wind and solar will not be permitted in National Parks and Areas of Outstanding Natural Beauty and all proposals should demonstrate that they will not have an unacceptable adverse impact on the environment.

Proposals should describe the net benefits the scheme will bring in terms of social, economic, environmental and cultural improvements to local communities.

New strategic grid infrastructure for the transmission and distribution of energy should be designed to minimise visual impact on nearby communities. The Welsh Government will work with stakeholders, including National Grid and Distribution Network Operators, to transition to a multi-vector grid network and reduce the barriers to the implementation of new grid infrastructure.



## Policy 18 – Renewable and Low Carbon Energy Developments of National Significance



Proposals for renewable and low carbon energy projects (including repowering) qualifying as Developments of National Significance will be permitted subject to policy 17 and the following criteria:

1. outside of the Pre-Assessed Areas for wind developments and everywhere for all other technologies, the proposal does not have an unacceptable adverse impact on the surrounding landscape (particularly on the setting of National Parks and Areas of Outstanding Natural Beauty);
2. there are no unacceptable adverse visual impacts on nearby communities and individual dwellings;
3. there are no adverse effects on the integrity of Internationally designated sites (including National Site Network sites and Ramsar sites) and the features for which they have been designated (unless there are no alternative solutions, Imperative Reasons of Overriding Public Interest (IROPI) and appropriate compensatory measures have been secured);
4. there are no unacceptable adverse impacts on national statutory designated sites for nature conservation (and the features for which they have been designated), protected habitats and species;
5. the proposal includes biodiversity enhancement measures to provide a net benefit for biodiversity;
6. there are no unacceptable adverse impacts on statutorily protected built heritage assets;
7. there are no unacceptable adverse impacts by way of shadow flicker, noise, reflected light, air quality or electromagnetic disturbance;
8. there are no unacceptable impacts on the operations of defence facilities and operations (including aviation and radar) or the Mid Wales Low Flying Tactical Training Area (TTA-7T);
9. there are no unacceptable adverse impacts on the transport network through the transportation of components or source fuels during its construction and/or ongoing operation;
10. the proposal includes consideration of the materials needed or generated by the development to ensure the sustainable use and management of resources;
11. there are acceptable provisions relating to the decommissioning of the development at the end of its lifetime, including the removal of infrastructure and effective restoration.

The cumulative impacts of existing and consented renewable energy schemes should also be considered.

## 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 climate emergency.

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

- For 70% 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 from 2020.

## Developments of National Significance

Proposals for large-scale energy development are classed as 'Developments of National Significance' and are determined by the Welsh Ministers. Proposals below the threshold for Developments of National Significance are determined by local planning authorities. As set out in legislation, applications for Developments of National Significance must be determined in accordance with Future Wales, which is the national development plan for Wales.

Large-scale energy developments include:

- All on-shore wind generation of 10 or more megawatts.
- Other energy generation sites with generating power between 10 and 350 megawatts.

The Welsh Government's policies on Developments of National Significance focus on renewable and low carbon energy schemes as it is anticipated that these will be the most common schemes coming forward for consideration in the period of the first plan. Future iterations of Future Wales will contain additional policies for other types of Development of National Significance where needed.

Policies 17 and 18 contain strategic spatial and detailed criteria-based policies respectively and should be considered together in the determination of applications, along with detailed advice on assessing benefits and impacts in Planning Policy Wales.

Policy 17 recognises the wealth of current and emerging renewable energy technologies that can contribute towards our energy and decarbonisation targets. It also demonstrates the Welsh Government's support in principle for all renewable energy projects and technologies. Proposals should ensure there is no significant unacceptable detrimental impact on the surrounding natural environment and local communities and that the development delivers positive social, environmental, cultural and economic benefits.

Policy 18 provides a decision-making framework for renewable and low carbon energy technologies. The planning system sets policy and takes decisions on on-shore schemes. The Welsh Government is supportive of off-shore proposals and sees them as an important part of our future energy mix but they do not fall within the remit of Future Wales. The on-shore development aspects of off-shore schemes are supported, for example cable landfall infrastructure. Strategic and Local Development Plans should identify and enable appropriate on-shore development to support such schemes. Future Wales and the Welsh National Marine Plan address energy and reflect the energy hierarchy as set out in Planning Policy Wales. Both plans recognise that there

are a number of opportunities to generate renewable energy across a variety of technologies both on-shore and off-shore which should be maximised to help meet the targets.

The planning system plays a significant role in the provision of new renewable and low carbon energy. It gives effect to our national targets and sets the overall strategic framework and direction within which developers can propose new energy infrastructure projects.

The Welsh Ministers have considered alternatives to the need for new large-scale electricity generation infrastructure, including building-mounted installations and energy efficiency measures. Although we believe that these measures have an important part to play in meeting our energy, decarbonisation and climate change targets, they will not enable us to meet these objectives on their own.

We recognise landscapes across Wales whose intrinsic value should be protected from inappropriate development. Sites in National Parks and Areas of Outstanding Natural Beauty are considered unsuitable for large-scale wind and solar. Outside of these areas a positive policy framework exists.

In the 'Pre-Assessed Areas for Wind Energy' (see Map on page 94) the Welsh Government has undertaken an assessment to identify these areas to provide certainty where, in principle, developments would be acceptable. In these areas there is a presumption in favour of large-scale on-shore wind energy development and the associated landscape change subject to the criteria in policy 18. Outside of these areas a positive policy framework still exists, subject to policy 18.

The Welsh Government will use its policy levers to assist in the delivery of renewable energy projects in these areas by co-ordinating strategic action to build the case for new or reinforced grid infrastructure where necessary. We will work

with relevant stakeholders to help unlock the renewable energy potential of these areas and the economic, social, cultural and environmental benefits they can bring to communities.

Large-scale renewable and low carbon energy schemes can generate direct social and economic benefit to local communities. Developers should explore how infrastructure improvements associated with a development (including transport infrastructure and communications systems) may be utilised by the host communities to bring additional, non-planning related benefits. Although not a planning consideration, local ownership of projects, in whole or part, can ensure these benefits are accrued over the long-term.

Irrespective of location or scale, the design and micro-siting of proposals must seek to minimise the landscape and visual impact, particularly those in close proximity to homes and tourism receptors. Both within and outside Pre-Assessed Areas, communities should be protected from significant cumulative impacts to avoid unacceptable situations whereby, for example, smaller settlements could be potentially surrounded by large wind schemes.

Wales has many significant active defence sites whose operations should not be compromised by the presence of new renewable energy infrastructure. Much of Mid Wales is also covered by a low flying tactical training area and the cumulative impact of proposals on this strategically important area of airspace must also be considered. Early consultation with the Ministry of Defence by developers is advised on these issues.

The construction of renewable and low carbon energy projects should be resource efficient, sustainable and reflect the principles of a circular economy. The availability of aggregates in line with the proximity principle, should be demonstrated along with an appropriate materials balance on site.





The provision of access to the site for construction and maintenance of the scheme must respond to the environment in which the renewable and low carbon energy projects are located. The removal of infrastructure as soon as their use ceases and the appropriate after-use of the site will also ensure environmental benefits are realised.

From a well-being perspective, the Welsh Government wishes to see as much renewable electricity generated and consumed as locally as possible, but new grid infrastructure for the wider transmission and distribution of electricity should be designed to minimise their visual impact on nearby communities. The Welsh Government will work with stakeholders, including national grid and distribution network operators, to transition to a multi-vector grid network and reduce the barriers to the implementation of any necessary new grid infrastructure.

The UK's energy system is now undergoing significant change, with energy generation and delivery becoming more distributed in the communities and regions where the energy is used. The boundaries between systems are also becoming blurred, with energy being converted into (and stored in) different forms to address a range of needs. There is also a need to consider large-scale energy storage as part of the energy system to provide grid balancing. During the lifetime of Future Wales the energy system is likely to move to a 'multi-vector system' approach, which will require flexibility to fully exploit the

inter-relationships and synergies between the power, heat and transport sectors. The Welsh Government acknowledges the significant challenge that grid infrastructure and capacity will have on the potential for new on-shore and off-shore renewable energy developments across Wales. We are committed to working with energy networks and developers to identify opportunities and barriers as well as working collaboratively to find solutions.

Further guidance on the development of on-shore wind will be produced to assist in the development process. The implementation of development will be monitored against the Welsh Government's renewable energy targets.

The Welsh Government will support regional and local energy planning to identify opportunities for all types of renewable projects. Energy planning in this context means the process undertaken by local authorities working with stakeholders to inform, shape and enable key aspects of the transition to a low carbon energy system. This will help local areas develop plans to meet climate change targets by exploring a range of different local energy scenarios. Local area energy plans will identify the preferred combination of technological and system changes needed to the local energy system, to decarbonise heat and local transport and realise opportunities for local renewable energy production.

## The Welsh Government will support regional and local energy planning to identify opportunities for all types of renewable projects

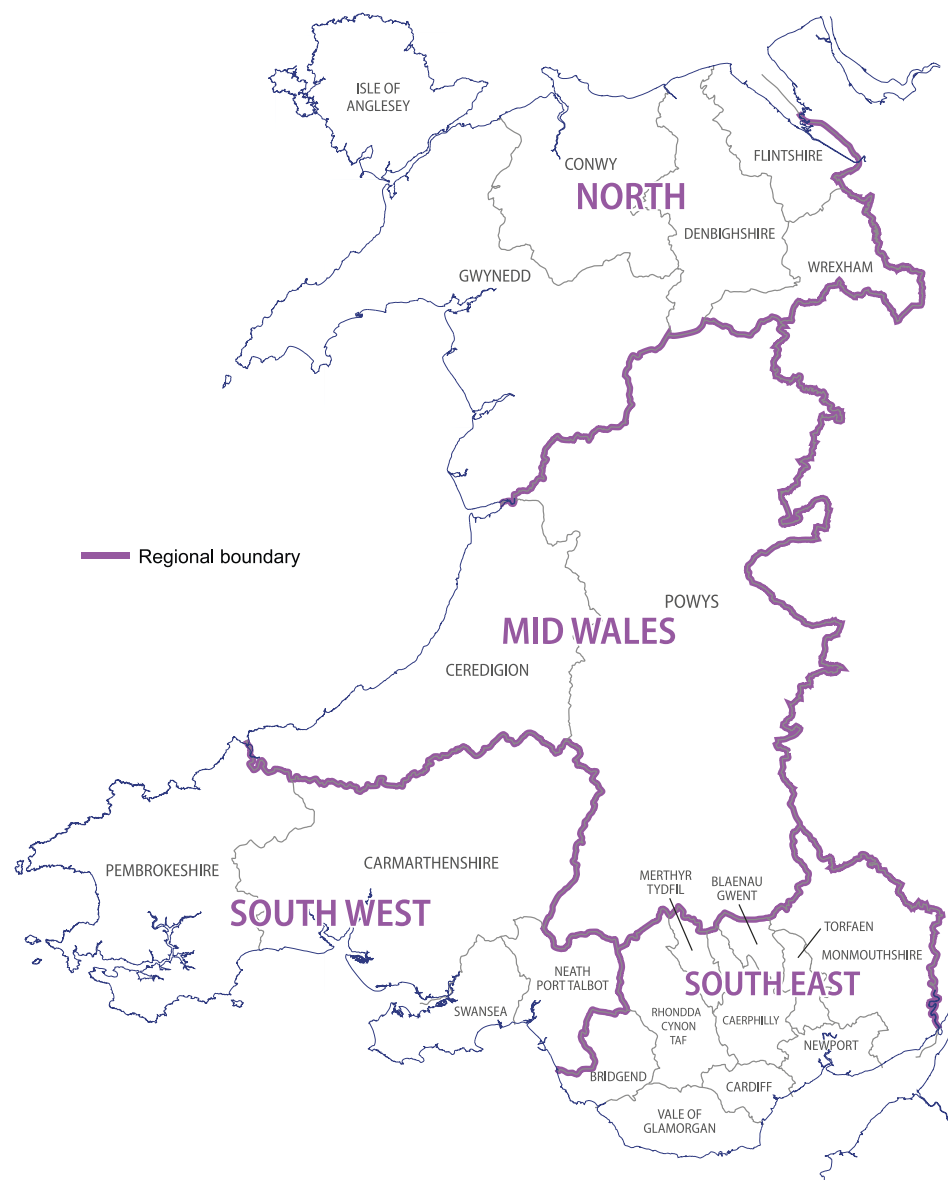
# 5 The Regions

**Regional planning will play an increasingly important role in the future and is central to our vision for a three tiered planning system.**

The planning system has an important role to play in shaping regional growth, co-ordinating and managing strategic development across each region and ensuring that wider than local issues are tackled collaboratively. Wales' four 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 preparation of Strategic Development Plans is required in all four regions. They should consider strategic regional issues including future growth areas, housing demand, economic development, transport and green infrastructure. These are issues which cut across local planning authorities and require a regional, co-ordinated planning response.

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











## Policy 19 – Strategic Policies for Regional Planning



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

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

The Welsh Government requires the adoption of Strategic Development Plans in the North, Mid Wales, South West and South East regions.

### Preparation of Strategic Development Plans

Strategic Development Plans are required within each region to establish a clear strategic policy framework and provide direction for decision makers. National and/or Regional Growth Areas are identified in all four regions and their growth will be planned through the preparation of Strategic Development Plans.

Local authorities and national parks formally working together is the best way for regions to meet the strategic challenges and opportunities they face and provide a strong framework for Local Development Plans. National, regional and local partners in the public, private and third sectors all have a contribution to make to the creation of Strategic Development Plans.

Wales' first national development framework, Future Wales, has three important roles in supporting Strategic Development Plans:

- it focuses Welsh Government and key stakeholder action and investment in the four regions, identifying key strategic spatial issues and providing a framework for the co-ordinated delivery of national economic, housing, regeneration, environmental, flooding, energy, rural and transport policies;
- it sets out the key regional issues identified across the preparation of Future Wales to provide a starting point for the preparation of Strategic Development Plans; and
- it provides a regional context for the planning system in advance of the adoption of Strategic Development Plans.

## Strategic Development Plans and the Future Wales Outcomes

In developing the policy framework required by policy 19, all Strategic Development Plans must consider and respond to the Future Wales Outcomes set out in Chapter 3. They must demonstrate how the spatial framework they develop and the key choices they make will contribute to delivering the Outcomes. The examination of Strategic Development Plans against the Future Wales Outcomes will be an important part of testing the soundness of Strategic Development Plans.

The spatial strategy and settlement hierarchy of a development plan are powerful tools in influencing where growth is located and how much land is developed. They define whether development will be concentrated in one place or dispersed across a wide area. These aspects of a plan determine whether the size and character of a place remain constant or are gradually changed, whether people live in places near or far away from places of work, and whether they need a car to access day-to-day services and community facilities. These are important decisions, affecting people's quality of life and influencing how resilient places are.

It is crucial that Strategic and Local Development Plans develop spatial strategies and settlement hierarchies that help meet the Future Wales Outcomes. Our national ambition to decarbonise society, to be more prosperous, to grow the Welsh language and to improve health must be key considerations when developing spatial strategies and settlement hierarchies. In sustainably managing natural resources, Strategic and Local Development Plans must ensure that environmental capacity issues have been fully assessed and addressed, for example, not exceeding environmental capacity for nutrients and other water quality issues. Planning Policy Wales sets out the policy context for biodiversity and ecological networks.





## Cross Border Relationships

It is essential that Strategic Development Plans are shaped by and are responsive to the relationship between regions, with English regions and the strategically important links with Ireland. No region exists in isolation. All share different functional relationships and are reliant on each other in different ways. In taking long term strategic decisions for their region, it is important that Strategic Development Plans do so based on a full understanding of their wider connections.

Decisions on where growth will be focused, how places will function, how people will move across regions and wider environmental designations must be shaped by an understanding of cross-boundary issues. This will ensure that growth, services, jobs and transport infrastructure are planned in one region to be as accessible to people in other regions as they can be. It will also ensure that regions do not unintentionally or unnecessarily compete for certain types of development.

One well planned sustainable strategic employment site, for example, accessible to a wide population across different regions, is better than three neighbouring regions all identifying the same type of strategic site, accessible to a smaller population, in less sustainable locations and with much less certainty of delivery as they compete for potential users.

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 in other regions or England. Focusing investment and action on improving the links between communities and economic opportunities outside the region can help support the region's communities and the development of a stronger economy.

## National Parks

National Park Authorities are unique planning entities with a specific remit to reflect the distinctive characteristics of their areas. National Parks are at the heart of resilient ecological networks and have a key role to play in Strategic Development Plans as part of the sustainable management of natural resources, protecting Wales's cultural heritage and promoting health and well-being. Future Wales policies respect the functions of National Parks in terms of their statutory purposes. At the regional scale, where National Park Authorities will be considered in the context of a wider spatial region, their statutory duty must inform Strategic Development Plans. Planning Policy Wales sets out the wider planning policy context for National Parks.





### **Growth Deals & Regional Economic Frameworks**

City region and growth deals are in place and emerging in all four regions. These deals bring together the UK and Welsh Governments, local authorities and local partnerships and establish funds to support growth within each region.

The Welsh Government's Chief Regional Officers lead across a number of areas including developing and maintaining strategic relationships with business, local authority and stakeholders in each region and identifying investment opportunities. The Chief Regional Officers will develop Regional Economic Frameworks with stakeholders to establish key themes and priorities for their regions, providing greater clarity for public sector action and for businesses looking to grow.

Strategic Development Plans should be informed by and support growth deals and the Regional Economic Frameworks. Strategic Development Plans should take the strategic locational decisions on housing, economic growth, key services and essential infrastructure that will help support growth deals and the Regional Economic Frameworks.

Over time as growth deals are developed and delivered, Regional Economic Frameworks are prepared and updated and Strategic Development Plans adopted and reviewed, the relationship between all three will be reciprocal and iterative. It is important in the future that the three elements continue to be informed by and support each other to deliver a co-ordinated and effective approach.

### **Future Wales Review**

Future reviews of Future Wales will be informed by Strategic Development Plans. This is an important feature of the three tiered development planning system – the ability of higher tier plans to be influenced by the emergence and adoption of other development plans.

It is essential that progress is made with the preparation of Strategic Development Plans. Full development plan coverage at all levels is essential to the delivery of the Future Wales Outcomes. The Welsh Government will consider using its intervention powers if required to commence and drive the preparation of Strategic Development Plans.

### **The Four Regions**

The regional policies focus on four areas – they provide a framework for national growth, for regional growth, for managing growth and supporting growth.

National growth policies identify where the Welsh Government expects national scale growth to be focused in accordance with Future Wales' spatial strategy. These areas are main centres of population, activity, services and major infrastructure. In establishing these areas in Future Wales, the Welsh Government is providing a framework for co-ordinated policies, infrastructure delivery and spending by Government, local authorities and stakeholders.



Regional growth policies identify places that perform important functional roles within their region. They are key centres for employment, services, tourism, retail and culture. The Welsh Government will work with local authorities to support these places, and to promote regeneration and growth. Strategic Development Plans should consider their role in their region both as places in their own right and as part of the wider regional hierarchy.

Managing growth policies support the identification of the location and scale of development within regions. It will be for Strategic Development Plans to establish the requirements of policy 19. These Future Wales policies provide an important regional framework in the absence of Strategic Development Plans, identifying key strategic spatial issues that require a larger than local policy response. The Welsh Government will ensure decisions taken by the planning system support the delivery of these policies.

Supporting growth policies focus on specific places and infrastructure, and ensure decisions taken by the Welsh Government and others support the delivery of Future Wales' spatial strategy. Strategic Development Plans should support the delivery of these policies and maximise the opportunities they provide for their regions.

Future Wales policies provide a framework for decisions with a regional dimension – both taken by the Welsh Government and by planning authorities. In the absence of Strategic Development Plans, Local Development Plans and the development management process will need to demonstrate how Future Wales' regional policies have been taken into account and demonstrate how they conform with Future Wales and Planning Policy Wales.



# NORTH

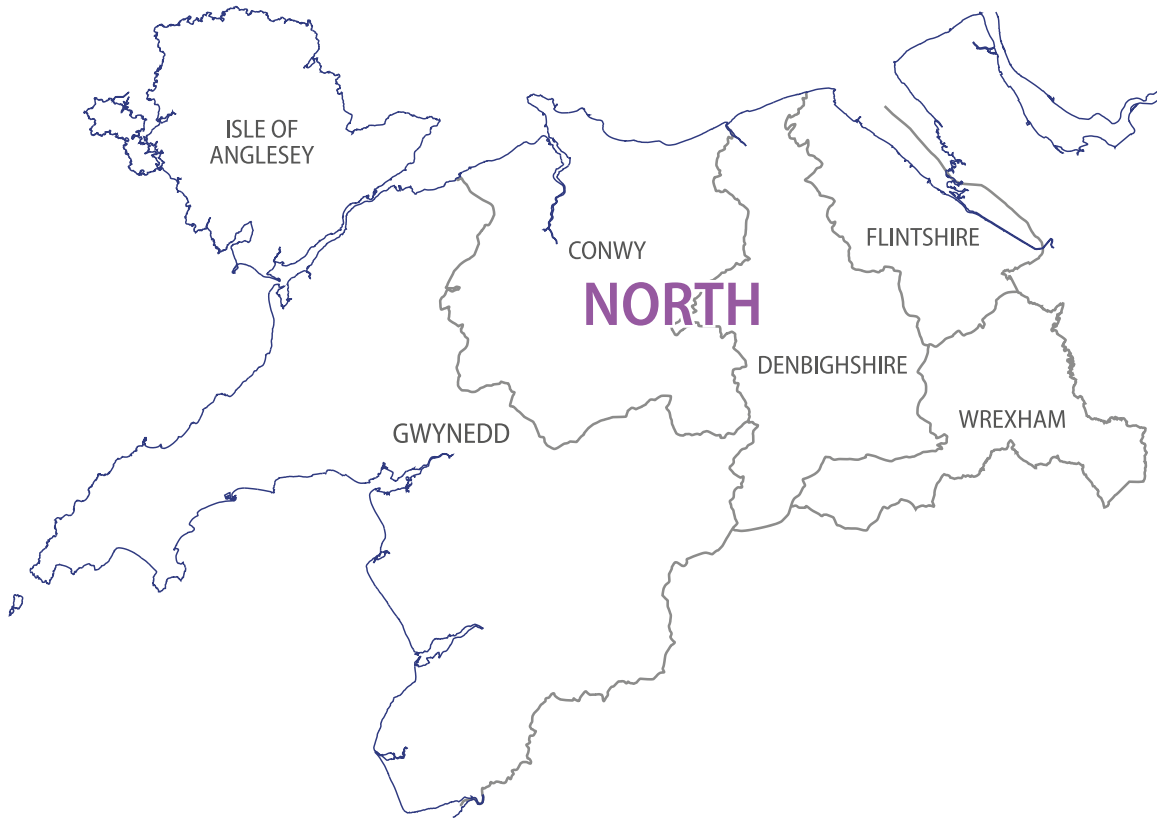
## Overview

The North 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 areas and former coal fields.

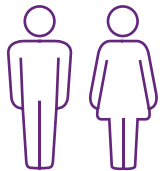
The regional issues that local planning authorities should work together to plan for are set out alongside the spatial policy areas that the Welsh Government will focus on from a national perspective to support the North region.

With **204,406 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. Development plans should contain settlement hierarchies and strategies to distribute growth in such a way that creates the conditions for Welsh to thrive and to be preserved as the community language in the many places where everyday life takes place through the medium of Welsh.





Population



Almost

**700,000**

Largest  
Flintshire  
**155,000**

Smallest:  
Isle of Anglesey  
**70,000**

Population  
change



**6.3%**

increase from 1998–2018

Largest: Conwy **8%**

Lowest: Anglesey **3.4%**

Health



**75%**

of people aged 16 and over  
reporting good or very good  
general health 2017–18 and  
2018–19 (age standardised)

Welsh  
language



**41.9%**

of people speak Welsh

A **2.4%** increase  
since 2009

Age



**23%**

of people 65 and over

an increase from  
**18.5%** in 1998

Transport



**18.5Km**

Average distance people  
travel to work



# Strategic Development Plan: A regional approach

**Across the North region there are a range of strategic issues. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.**

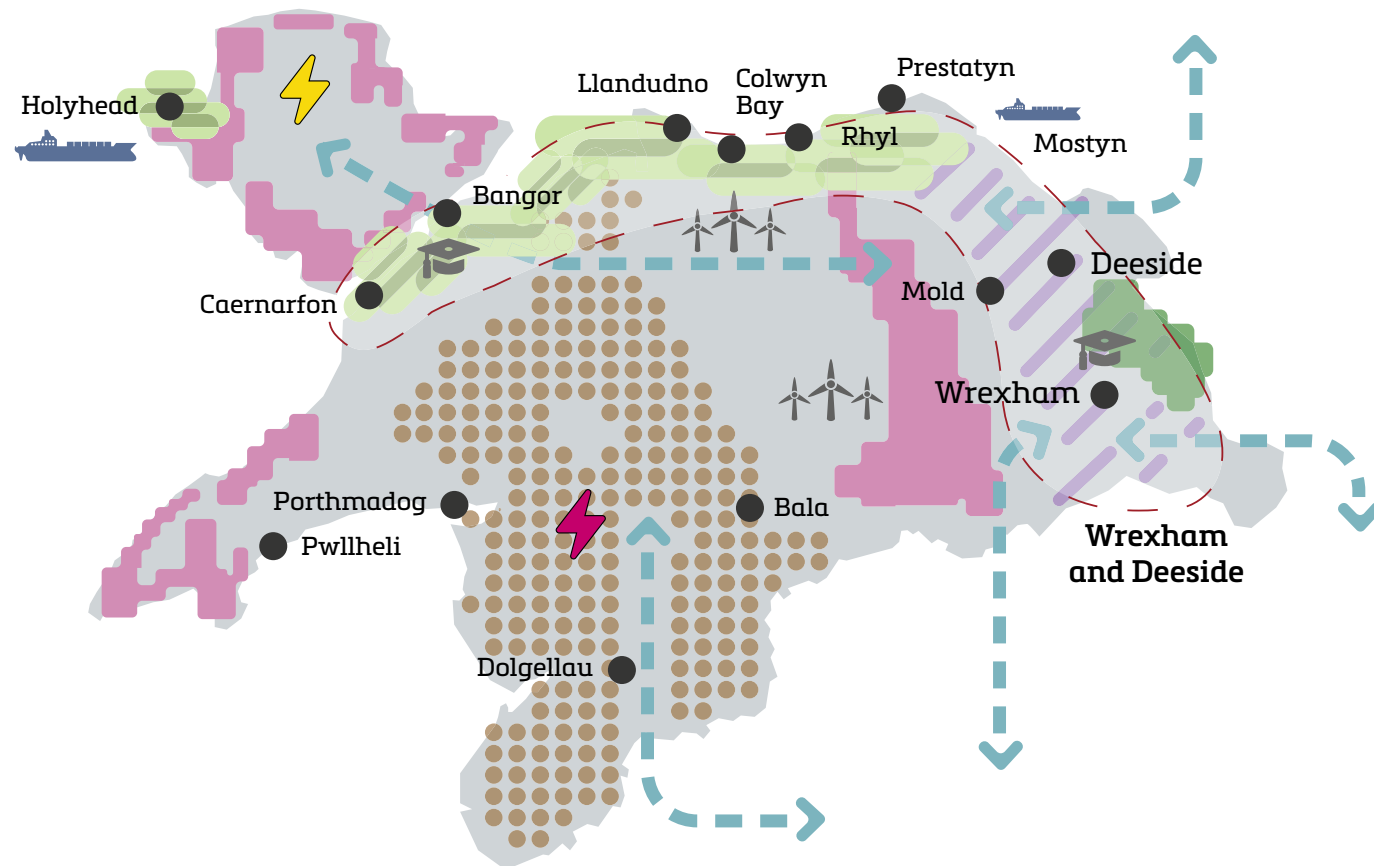
Housing, economic growth, digital and transport connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources, flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonisation and responding to the threats of the climate emergency 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, address congestion, reduce car based commuting and improve air quality.

The region should work together to consider the connections with Mid Wales, Ireland, Cheshire West and Chester and the North West of 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.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan

## Regional strategic diagram



National Growth Area



Regional Growth Area



Ports



National Connectivity



Green Belt – Areas for Consideration

Areas of Outstanding  
Natural Beauty

National Parks

Anglesey Energy Island,  
including Wylfa Newydd

Trawsfynydd



North Wales Metro

Pre-assessed Areas for  
Wind Energy

Universities



## National Growth



### Policy 20 – National Growth Area – Wrexham and Deeside

Wrexham and Deeside will be the main focus for growth and investment in the North region.

Strategic and Local Development Plans across the region must recognise the National Growth Area as the focus for strategic economic and housing growth; essential services and facilities; advanced manufacturing and transport infrastructure.

The Welsh Government will work with regional bodies and local authorities in the region and in neighbouring regions of England to promote and enhance Wrexham and Deeside's strategic role and ensure key investment decisions support places in the National Growth Area and the wider region.

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Policy 1 is the overarching framework for where development and growth will be focused in each region. In accordance with Future Wales' spatial strategy, growth in the North region should be focused on the main existing built-up areas of Wrexham and Deeside. The National Growth Area includes Wrexham and the Wrexham Industrial Estate, Broughton, Buckley, Deeside and the Deeside Industrial Park.

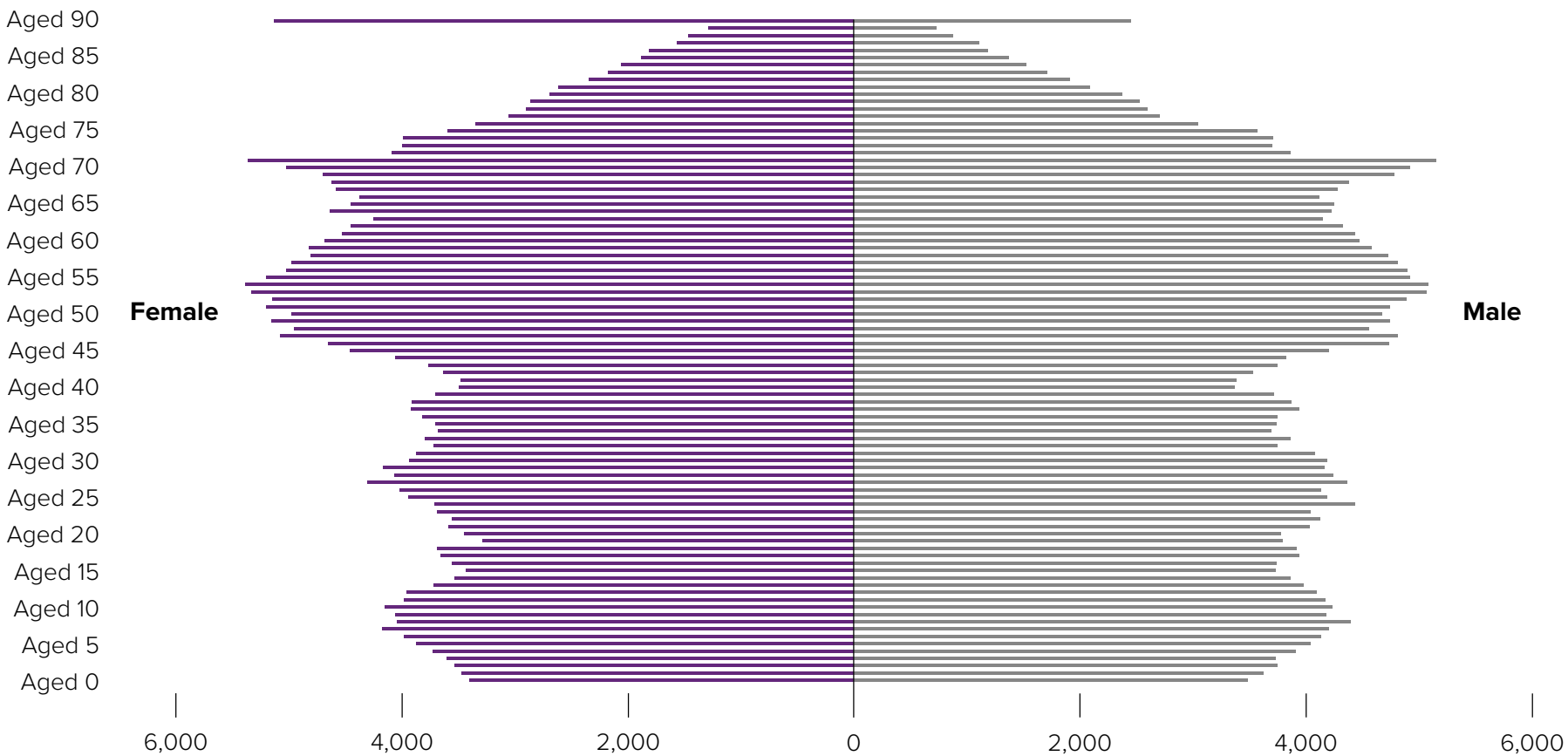
The Wrexham and Deeside area is the region's main centre of population, employment and services and is served by the main connectivity infrastructure. In accordance with policy 19, a Strategic Development Plan must ensure the region manages growth in a planned and co-ordinated way to support the needs of the National and Regional Growth Areas and the wider region. Strategic decisions on the location of key services and infrastructure should support existing settlements and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations, support actions to address inequality and deprivation, and improve links to adjoining regions.

Policy 7 sets out the national strategic approach to delivering affordable housing and ensures the focus of funding and housing policies is on driving increased provision. Planning and co-ordinating the delivery of new housing to meet identified needs is an important task for the regional planning process. Under the Welsh Government central estimates 16,200 additional homes are needed in the region until 2039 and over the initial five years (2019-20 to 2023-24) 53% 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. Understanding and managing different development pressures across the region will be a key issue for Strategic Development Plans. Strategic housing issues must be considered at the regional level and not on the basis of the aspirations of individual local planning authorities.





Population distribution in North Wales by age and gender, 2018



## Regional Growth



### Policy 21 – Regional Growth Area – North Wales Coastal Settlements



The Welsh Government supports sustainable growth and regeneration in regionally important towns along the northern Coast. Holyhead, Caernarfon, Bangor, Llandudno, Colwyn Bay, Rhyl and Prestatyn will be a focus for managed growth and they have an important sub-regional role complementing the National Growth Area of Wrexham and Deeside.

Strategic and Local Development Plans should recognise the roles of these places as a focus for housing, employment, tourism, public transport and key services within their wider areas and support their continued function as focal points for sub-regional growth.

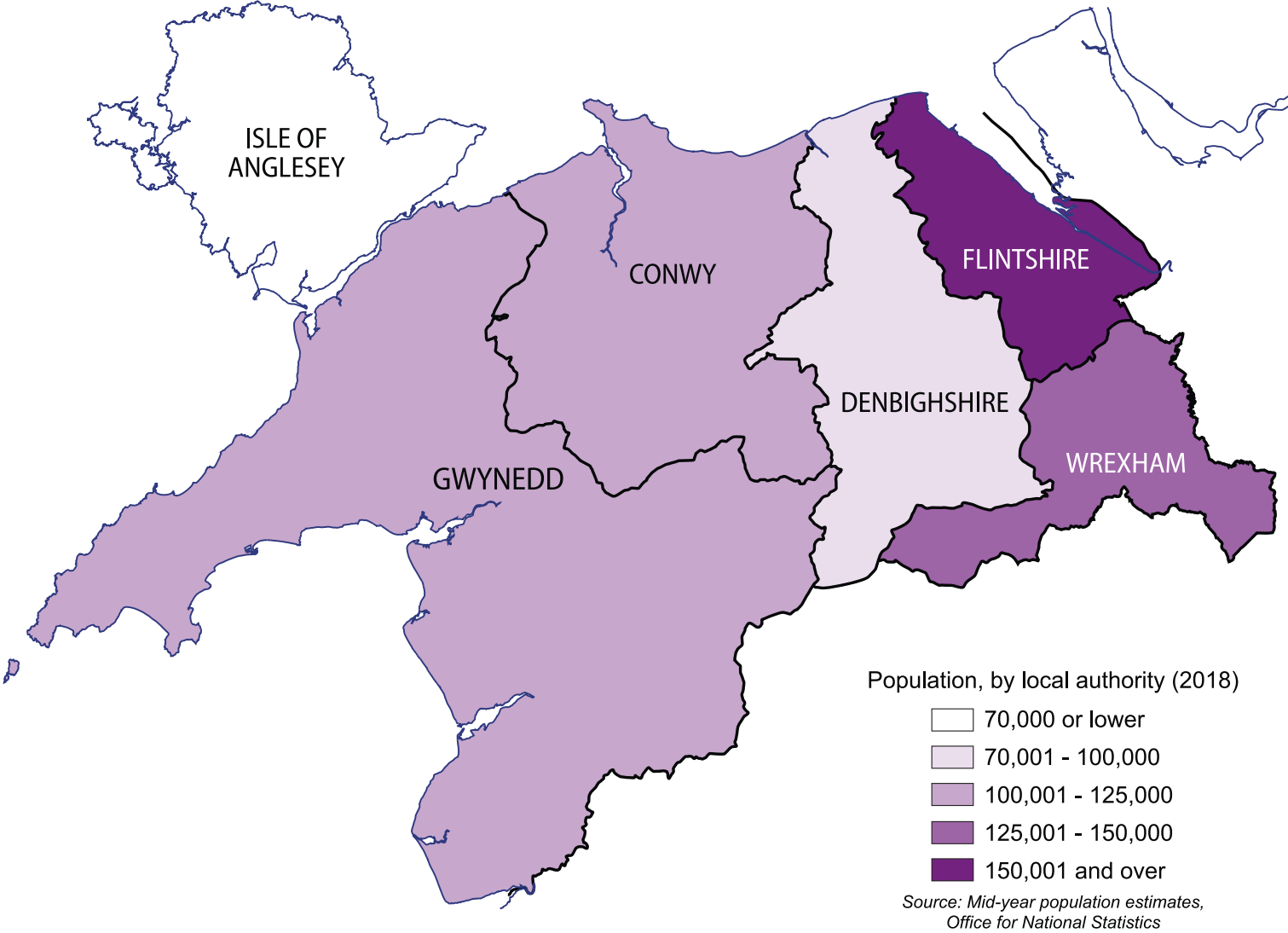
The majority of the North region's population live near the coast. The arc of large towns – and a city – from Holyhead in the west to Deeside in the east includes Caernarfon, Bangor, Llandudno, Colwyn Bay, Rhyl and Prestatyn. The Welsh Government expects the built-up areas in this arc to continue to play a central role within the region. Development in these towns will ensure they continue to provide jobs; leisure, retail and cultural opportunities; and education, health and other public services. It is important this corridor maintains its regional functions and adopts a managed growth approach that allows these multiple roles to be enhanced. Regeneration opportunities in this corridor are strongly supported.

Policies 2, 3, 6 and 8 will ensure development in the region's towns and cities is sustainably located in areas with good access to public transport where reliance on the car can be reduced. Opportunities for publicly-owned land to be used to demonstrate leadership through placemaking are strongly supported.

Policies 4 and 5 will help to ensure that the region's rural areas grow in an appropriate way, supporting rural economies and services. In accordance with policy 4, the Welsh Government believes that the future for rural areas is best planned at the regional and local level. Strategic and Local Development Plans will plan positively for the rural communities in the region and consider the balance to be struck between focusing development in the main built-up, urban areas and the rural areas. Gaps in digital or mobile connectivity will be addressed through policies 13 and 14 to ensure that services are improved.

The Regional Economic Framework, prepared in partnership with local authorities, communities, businesses 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, has 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 facilitate the delivery of the North Wales Growth Deal and ensure support for a smart, resilient and connected region. 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. The Strategic Development Plan should also consider the importance of key economic sectors across the region. It should also recognise opportunities for the development of economic clusters, where businesses choose to locate in close proximity for mutual benefit, and whether there is a need for further infrastructure investment to support this.

The Welsh Government strongly supports the development of the foundational economy in the region. The foundational economy represents those parts of the economy which are integral to the well-being of places, communities and people and which deliver people's everyday needs. The Welsh Government will continue to support greater resilience for local and regional economies and support business growth and new employment opportunities. Strategic and Local Development Plans should identify the role of the foundational economy, consider how the land-use planning system can support it and develop appropriate policies. Areas of the foundational economy which the planning system can support include regeneration initiatives, health and social care, social housing, tourism and steps to encourage greater community benefits from new development.

Tourism is an important sector to the economy across the North. Opportunities to support coastal resorts and attractions and new outdoor and active facilities should be supported. The re-development of former industrial sites across the North for adrenaline activities, including zip-wires, trampolining and surfing, demonstrate the potential to build on the region's rich

heritage and develop new attractions. Strategic and Local Development Plans should consider existing and potential new tourism areas, the type of visitors they attract and the infrastructure required to support growth.

The universities in Bangor and Wrexham are an important presence in the region, providing further education, undertaking research and supporting innovation, providing employment, attracting students, and supporting the local businesses and communities around them. Strategic and Local Development Plans should consider their role in the region and how they can play a bigger role in supporting the regional economy, innovation and their communities.

The Strategic Development Plan should seek to maximise opportunities arising from investment in high value manufacturing sectors. The Welsh Government supports developments such as the Advanced Manufacturing Research Institute at Broughton, a collaboration between the University of Sheffield's Advanced Manufacturing Research Centre, Deeside Enterprise Zone Advisory Board, Swansea University and Coleg Cambria. This supports Airbus and other leading-edge companies and focuses on R&D in advanced manufacturing techniques and skills development for high value manufacturing, aerospace, automotive, nuclear and food sectors.

The Welsh Government wishes to see biodiversity enhanced and ecosystems become more resilient across the region. Policies 9 and 15 set out the national strategic approach and will ensure action to address the climate emergency, reverse biodiversity decline and ensure the well-being of communities takes place. These policies require consideration be given to the type of action necessary at regional and local levels and how this can be facilitated through Strategic and Local Development Plans.

Investment in creating resilient ecological networks and green infrastructure brings multiple benefits for communities and businesses as well as nature itself. Action to improve resilience is required in all areas of the region and specific approaches will vary depending on the nature of the location and the opportunities to create greater resilience. Where there are conflicting priorities these will need to be considered and resolved regionally and locally. Policies 2, 3, 4 and 5 must work in a complementary way with policies 9 and 15.

In urban areas, including the National Growth Area of Wrexham and Deeside and in the Regional Growth Area, the enhancement (net-benefit) of biodiversity and the provision of green infrastructure must both shape growth strategies and be fully integrated as part of location and design solutions for proposed development. Policies 11 and 12 may provide opportunities to create corridors of green infrastructure and in coastal locations, including Deeside, nature-based solutions must be considered as part of proposed schemes to manage flood risk and coastal erosion.

Based on the indicative map that supports policy 9, upland areas in the north and north-west, including the Snowdonia National Park, and south-east of the region contain the most resilient ecological networks, but this does not mean they are as resilient as they ought to be. Lowland areas are less resilient and tend to be subject to different forms of agricultural and development pressures which are often coupled with coastal flooding and erosion risk along the north coast and in lower lying river valleys.

Policy 9 requires that existing networks be improved and expanded. Equally, opportunities must be identified to safeguard and create resilient networks, and the ecosystem services on which they depend, and the multiple benefits derived from green infrastructure where currently this is not the case. This includes considering the role of protected landscapes and nature

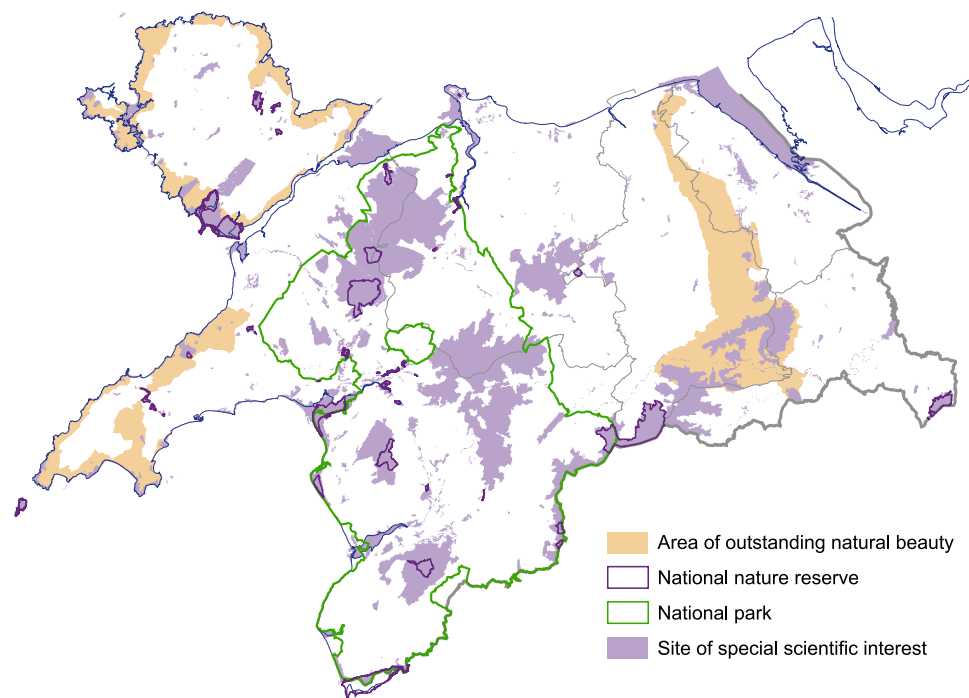
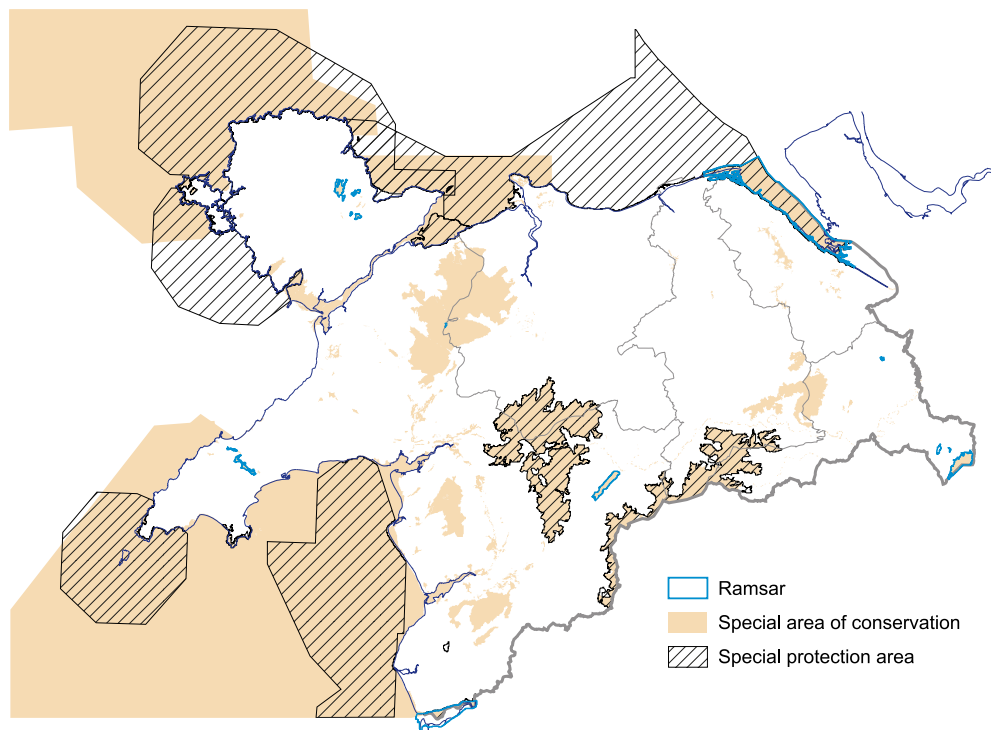
conservation designations. Policies 9 and 15 work alongside policies 4 and 5 to require the relationships between all forms of land use and management be considered more fully if we are to address the climate emergency, reverse biodiversity decline and enable communities to benefit from more sustainable forms of managing natural resources. This is especially the case in large parts of the region's rural areas.

Flooding from rivers and the sea is a major issue across the region. The Growth Areas are mainly coastal, therefore they face increasing risk of flooding as a result of rising sea levels. Critical transport infrastructure providing connectivity within the region, to the North West of England and Ireland are vulnerable to flooding from the sea in some places. There is extensive flood risk management infrastructure already in place in the region to protect homes and services, but many areas remain vulnerable, including places near the Dee, Clwyd and Conwy rivers. The potential for flooding around Wrexham, Deeside, and along the north coast will have implications for the delivery of growth in the region. Policy 8 sets out the national strategic approach to flood risk management and will ensure growth aspirations in National and Regional Growth Areas are co-ordinated with strategic decisions on managing flood risk.

It is vital the region plays its role in decarbonising society and supports the realisation of renewable energy. Policies 17 and 18 set out Future Wales' approach to renewable energy generation across Wales. There is strong potential for wind, marine and solar energy generation and Strategic and Local Development Plans should provide a framework for generation and associated infrastructure. The Welsh Government wishes to see energy generation, storage and management play a role in supporting the regional economy in the North. Local ownership and distribution is important for ensuring communities in proximity to renewable energy development benefit from it and that our future energy system better serves Wales.



## Designated Natural Environment in the North



## Managing Growth



### Policy 22 – Green Belts in the North



The Welsh Government requires the Strategic Development Plan to identify a green belt around Wrexham and Deeside to manage urban form and growth. The Strategic Development Plan must consider the relationship of the green belts with the green belt in Cheshire West and Chester. Local Development Plans and development management decisions should not permit major development in the areas shown for consideration for green belts, except in very exceptional circumstances, until the need for green belts and their boundaries has been established by an adopted Strategic Development Plan.

The close relationship between the North East and Cheshire West and Chester and the large green belt immediately adjoining the administrative borders of Wrexham and Flintshire, mean that long-term development pressures will in part be directed from England to the North region. The proximity to a large populous English region provides opportunities that can support the North, but these opportunities must be managed strategically and on a regional basis.

Strategic decisions on the location of development, 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, support actions to address inequality and deprivation and improve links to neighbouring areas of England. Planning Policy Wales sets out the policy context for establishing green belts. In advance of a Strategic Development Plan, the areas shown for consideration for green belts should be treated as if they have been designated as green belts by a Strategic Development Plan. Planning Policy Wales sets out the circumstances and limited forms of development that may be appropriate in green belts and this should be applied to the areas identified for consideration for green belts.

The North has extensive rural areas and well established rural communities. The Strategic Development Plan for the region should consider the balance to be struck between focusing development in the main built-up, urban areas and the rural areas. Decisions on the delivery of key services can have a profound effect on people's daily lives, particularly the less mobile, and it is essential these decisions are taken on the basis of a clear understanding of their impacts. As well as schools and health facilities, access to services like banks, post offices, libraries and shops can have a real impact on people's daily lives in rural areas.

Strategic and Local Development Plans should consider the impacts of population change and ageing on their rural communities. The societal issues that drive these changes are wider than the planning system and are not easy challenges to address. The Welsh Government wishes to see Local Development Plans in the region play a central role in shaping how rural communities can sustain themselves. Local Development Plans should seek to support growth and appropriate development in rural towns and villages. This includes market and affordable housing, employment and the provision of services. Local Development Plans should support and co-ordinate their decisions with those of economic policy-makers, health, education and other essential service providers.

They should consider the needs of all residents, including older people and people with disabilities, and ensure that specialist housing provision is considered and planned for.

Managing the North's outstanding historic and natural resources is a priority for the region. Outstanding places include the coast and the Llŷn peninsula, Snowdonia National Park, and the Clwydian Range and Dee Valley Area of Outstanding Natural Beauty; and the Pontcysyllte Aqueduct and Canal and the Castles and Town Walls of King Edward World Heritage Site. They should be protected for the enjoyment of future generations and help to provide economic benefits for the region's communities. The region's distinctive heritage should be preserved and enhanced by high quality development.

The region's concentration of population, its historic and future growth and proximity to markets in the North West of 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 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.









## Supporting Growth



### Policy 23 – North Wales Metro



The Welsh Government supports the development of the North Wales Metro and will work with Transport for Wales, local authorities and other partners to enable its delivery and maximise associated opportunities.

The Welsh Government will work with local and regional authorities in North Wales and the North West of England to ensure the Metro and wider transport investments strengthen cross-border transport connections with improved transport links between the North, Chester, Liverpool and Manchester.

Strategic and Local Development Plans must support the North Wales Metro. Planning authorities should plan growth and regeneration to maximise the opportunities arising from better regional and cross border connectivity, including identifying opportunities for higher density, mixed-use and car-free development around new and improved metro stations.

Across Wales and the regions, the Welsh Government wishes to see development built in sustainable locations supported by active travel and public transport infrastructure and services to enable people to live active and healthy lives. This includes ensuring levels of air and noise pollution are reduced or at least minimised. The aim is to reduce the need to travel, particularly by private vehicles, and support a modal shift to walking, cycling and public transport. Policies 11 and 12 set out the strategic approach to national and regional connectivity and how the Welsh Government will support and invest in improvements to active travel and public transport.

In the North region, rail infrastructure and services are fundamental to an effective and efficient transport network and are central to improving regional and national connectivity. The North Wales Metro provides an opportunity to improve accessibility across the region and is supported by the Welsh Government. There are strong functional relationships between

settlements in the North and the North West of England, with people travelling daily in both directions to access jobs, services and facilities.

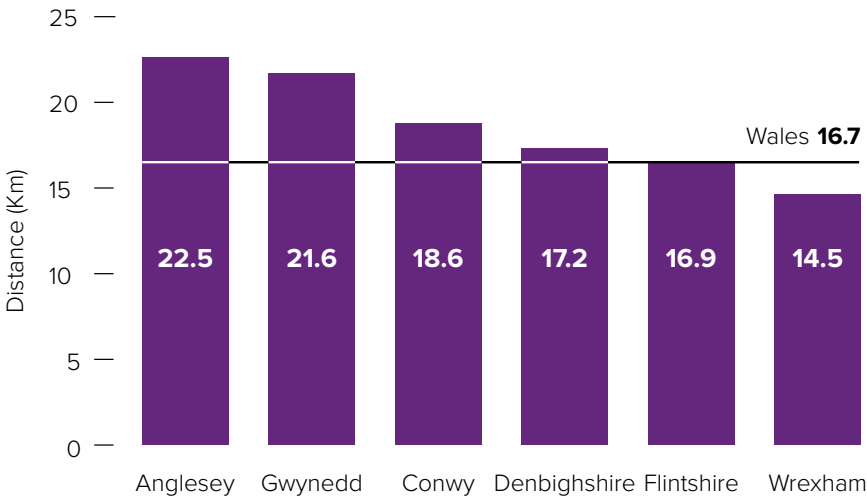
The Metro will make it easier and faster to travel between the north coast, Wrexham, Deeside and the North West of England. It will open up opportunities across the region and is a vital part of the Welsh Government's vision to develop the region's economy and links with the Northern Powerhouse.

Facilitating access to the Metro by active travel will make an important contribution to modal shift from car to public transport journeys at a regional level. Achieving this will require high quality active travel routes linking neighbourhoods and trip destinations with metro stations. The provision of high quality, secure cycle parking at interchanges will also be essential.

In accordance with policy 19, 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. 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 focused on improving the links between Welsh communities and economic opportunities in England. Where connectivity corridors between the region and England are identified, the potential for these corridors to incorporate green infrastructure must be explored.

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Average distance travelled to work (Km) by workers aged 16–74 in 2011, by local authority of residence







## Policy 24 – North West Wales and Energy



The Welsh Government supports North West Wales as a location for new energy development and investment. Proposed developments associated with the Isle of Anglesey Energy Island Programme, Wylfa Newydd and Trawsfynydd will be supported in principle as a means to create significant economic benefits for the area as well as generating renewable or low carbon energy.

New energy-related development in the region should support local and regional communities; provide jobs and investment in training and skills; and work with universities and businesses across the region and the North West of 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 low carbon energy generation, their contribution towards the UK's energy mix and security, the economic benefits they would bring to the region and their impacts on the natural and historic environment.

On-shore developments associated with off-shore renewable energy projects will be supported in principle.

### A unique region

The planning system has an important role in supporting renewable and low carbon energy and ensuring the North plays its part in decarbonising society. The region has strong potential for generating wind, solar and marine energy and has the potential to play a continuing role for energy generation from nuclear power. There is also the opportunity across the region for the generation of hydrogen to deliver energy storage capacity and a transport fuel source for the A55 corridor, Holyhead Port and rural communities. There are a number of opportunities for off-shore renewable energy developments in this area and the role of development plans is to enable appropriate on-shore development, including cable landfall sites.

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 in investment, skills and training. The Anglesey 'Energy Island' Programme also seeks to co-ordinate action in relation to 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 or Advanced Modular (nuclear) Reactors could also potentially provide low carbon energy generation in the region.

Trawsfynydd is a potential site for a Small Modular Reactor, building on the existing sector-specific technical capacity and expertise available locally and creating a new nuclear industry growth zone. The site is in a unique position, having previously been a former nuclear power station with the necessary infrastructure and local skills in place. The site lies within the Snowdonia National Park and major development here should be subject to the principles in Planning Policy Wales. At the detailed planning stage, it would be necessary to consider design and impact upon the environment and landscape of the National Park including potential mitigation.

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



## Overview

The Mid Wales region comprises **Ceredigion, Powys and the majority of the Brecon Beacons National Park**, and is home to **205,000 people**. It is Wales' most rural region and includes extensive upland areas, the Cambrian mountains, Black Mountains, Brecon Beacons and an attractive coastline. Population is spread in towns, villages and rural areas across the region.

The regional issues that planning authorities should work together to plan for are set out alongside the spatial policy areas that the Welsh Government will focus on to support the Mid Wales region.

With **58,954 Welsh speakers** across the region and with concentrations of settlements where Welsh is the first language for many people, it is important that Strategic and Local Development Plans consider the relationship between strategic housing, transport and economic growth and the Welsh language. Strategic and Local Development Plans should contain settlement hierarchies and growth distribution policies that create the conditions for Welsh to thrive and remain as the community language in the many places where everyday life takes place in Welsh.





### Population



Approx

**205,000**

Largest:  
Powys  
**132,500**

Smallest:  
Ceredigion  
**73,000**

### Population change



**3.8%**

increase from 1998-2018

Largest: Powys **5.6%**  
Lowest: Ceredigion **0.7%**

### Health



**74%**

of people aged 16 and over reporting good or very good general health 2017-18 and 2018-19 (age standardised)

### Welsh language



**40.1%**

of people can speak Welsh

A **6%** increase since 2009

### Age



**26.3%**

of people 65 and over

An increase from **19.3%** in 1998

### Transport



**21.7Km**

Average distance people travel to work



# Strategic Development Plan: A regional approach

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

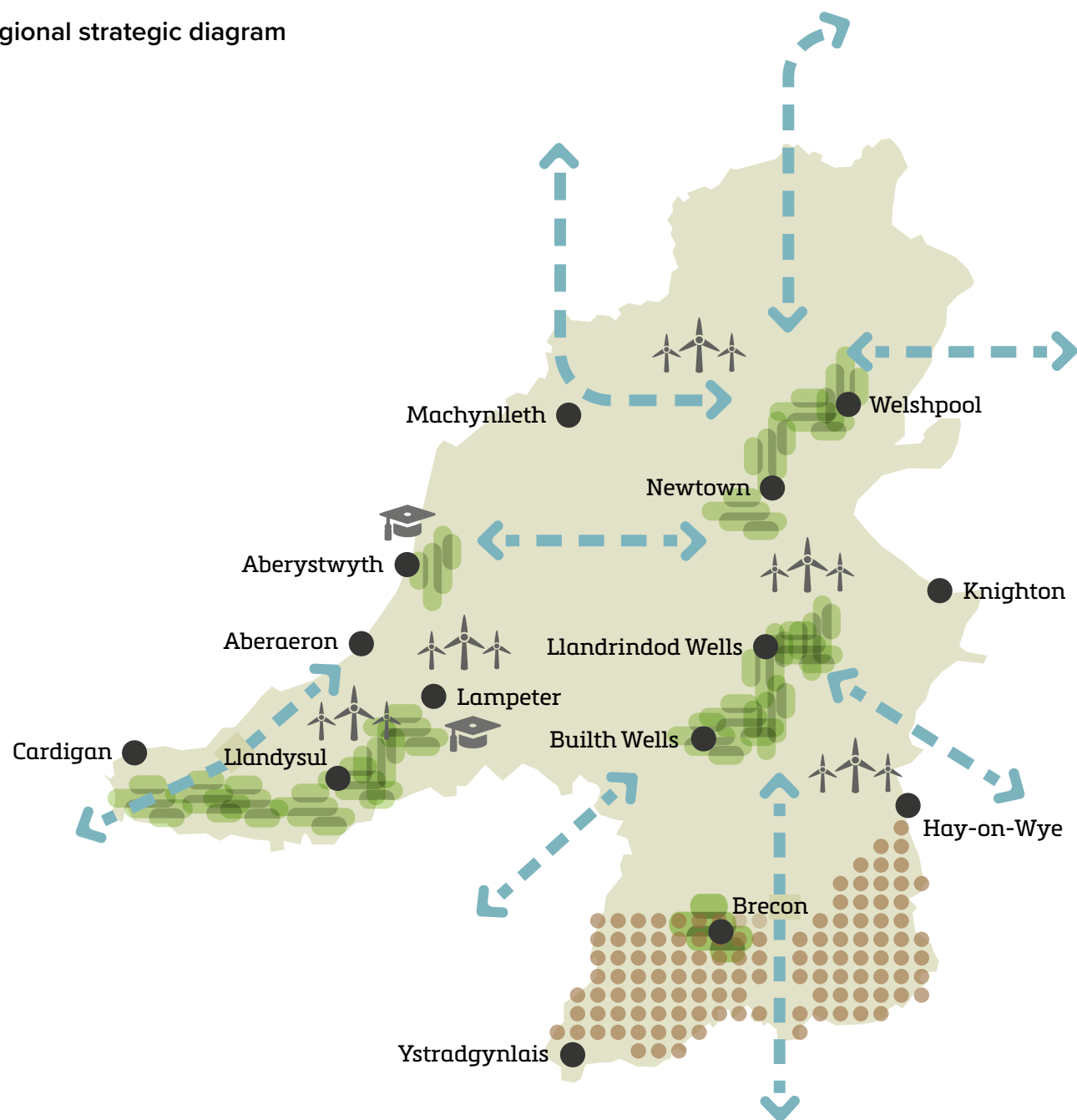
Housing, economic growth, digital and transport connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources and flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonisation and responding to the threats of the climate emergency 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 encourage greater active travel and public transport use.

The region should work together to consider the connections with the North, South West and South East regions and the English Midlands. 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.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan

## Regional strategic diagram



Regional Growth Area



National Connectivity



National Park



Pre-assessed Areas for  
Wind Energy



Universities



## Regional Growth



### Policy 25 – Regional Growth Areas – Mid Wales



The Welsh Government supports sustainable growth and development in a series of inter-connected towns across the region. Development in these Regional Growth Areas should meet the regional housing, employment and social needs of Mid Wales. The Regional Growth Areas are:

- The Teifi Valley, including Cardigan, Newcastle Emlyn, Llandysul and Lampeter
- Brecon and the Border
- The Heart of Wales, including Llandrindod Wells and Builth Wells
- Bro Hafren, including Welshpool and Newtown
- Aberystwyth

The Welsh Government supports development in all parts of the region in meeting local needs. Strategic and Local Development Plans will determine the most appropriate locations for growth in Mid Wales and should demonstrate how a regional approach has informed decisions on future growth.

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Mid Wales is a large and predominantly rural area comprising 39% of the land mass of Wales but only around 7% of the population. Mid Wales has a strong cultural heritage, a high proportion of Welsh speakers and is characterised by market towns and small settlements. Mid Wales has a wealth of outstanding natural assets from harbours and waterways to mountains and designated landscapes, all of which contribute to an outstanding tourism offer. The geography of the Mid Wales economy is a critical component in driving and supporting intra-regional growth across Wales, where natural and academic assets support cutting-edge research and opportunities to create new industrial clusters.

There is a high degree of mobility between places, where people travel to access services, facilities and jobs outside of the place they live. Trips are typically longer than those made in more built-up and urbanised areas and reliant on road based travel given the absence of frequent bus and rail services.

There is a need for a careful balance to be struck between what individual settlements in the region can provide and what people may have to access in neighbouring places. Decisions on the delivery of key services can have a profound effect on people's daily lives, particularly the less mobile, and it is essential these decisions are taken on the basis of a clear understanding of their impacts. As well as schools and health facilities, access to services like banks, post offices, libraries and shops has a real impact on people's daily lives in rural areas.

Population change and ageing populations can impact on the balance of a community. The societal issues that drive these changes are wider than the planning system and are not easy challenges to address. The Welsh Government wishes to see Strategic and Local Development Plans in Mid Wales play a central role in shaping how rural communities can sustain themselves. Local Development Plans should seek to support growth and appropriate development in rural towns and villages.

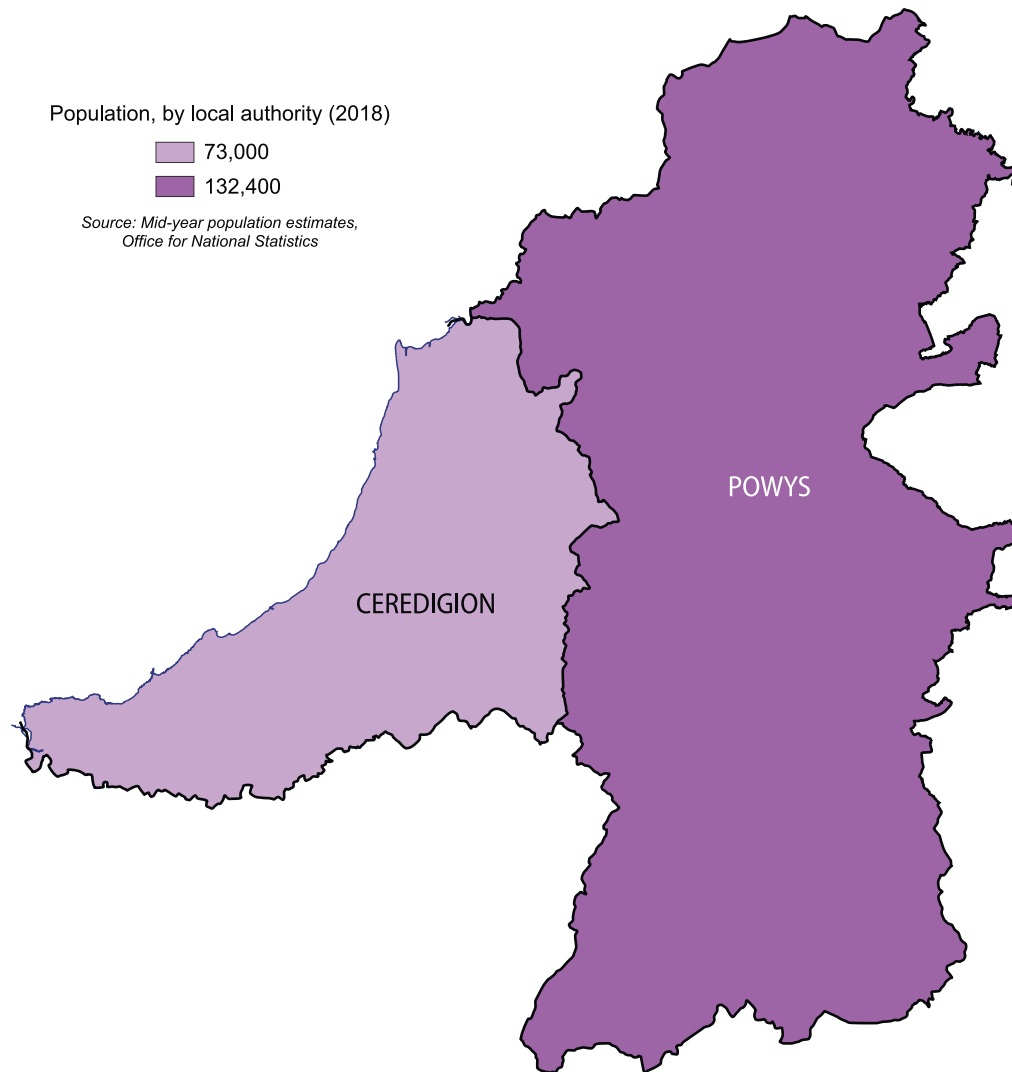


### Population distribution in Mid Wales by age and gender, 2018



This includes market and affordable housing, employment and the provision of services. Local Development Plans should support and co-ordinate their decisions with those of economic policy-makers, health, education and other essential service

providers. They should consider the needs of all residents, including older people and people with disabilities, and ensure that specialist housing provision is considered and planned for.



Policy 1 is the overarching framework for where development and growth will be focused in each region. In accordance with Future Wales' spatial strategy, growth should be focused in five main areas across the region. They are focal points for the region's social and economic activities, with a significant foundational economy. Development in these areas will ensure they continue to provide jobs; leisure, retail and cultural opportunities; and education and health services. It is important that Strategic and Local Development Plans adopt a managed growth approach for housing, employment and key services that allows these regional roles to be enhanced.

Bro Hafren is the area in the upper reaches of the River Severn, where towns including Welshpool, Newtown and Llanidloes are important and vibrant centres. The area supports an existing industrial cluster within the advanced manufacturing sector, including niche areas of expertise such as automation and motion engineering which offer high value employment and productivity growth potential.

The Teifi Valley in the south-western part of the region overlaps the South West region and includes the attractive market towns of Tregaron, Lampeter, Llandysul, and Cardigan. It provides connecting infrastructure that is used and relied on by the resident population and the communities around them. While Cardigan and Llandysul serve rural hinterlands beyond the region, places outside the region like Newcastle Emlyn similarly serve communities in Mid Wales. It is important that the respective adjoining development plans are aligned and recognise how services and community facilities are used and are beneficial to people in each region.



The Heart of Wales towns include Llandrindod Wells, Builth Wells and Rhayader and are historically significant places, forming part of a network of spa towns in Mid Wales. Llandrindod Wells in particular continues to attract visitors and retains the architecture and charm that made it a popular destination in the Victorian era. Builth Wells and Llanellwedd are the epicentre of the Welsh agricultural sector, with the Royal Welsh Show held every July remaining a hugely popular and economically important event. Builth Wells is a strategically important location as the point at which two arterial north-south roads meet.

The border towns of Knighton and Presteigne provide important roles as local centres of employment and services with strong links to the English marches. Brecon and Ystradgynlais have strong links to the south. Brecon is linked by the A470 to Merthyr Tydfil and the wider South East region and also has strong local links with Hay-on Wye, Talgarth and Crickhowell to the east. Ystradgynlais is the link between Mid Wales and the industrial Swansea and Neath Valleys. Tourism is central to the area's economy with visitors from around the world drawn to the stunning natural landscape which includes the Black Mountains and Brecon Beacons.

Aberystwyth is the largest town in the region and has a range of important services, including the University and Bronglais General Hospital. It remains a strategic location and centre for national institutions, including the National Library of Wales. It is the main hub for public transport in the region and a key employment and administrative centre. Aberystwyth provides an important tourism, recreation and leisure location and facilities such as the Aberystwyth Innovation and Enterprise Campus provide opportunities to enhance the economic opportunities available in the region. To the north of Aberystwyth, Machynlleth is a vital link to the North region and an important centre where smaller settlements along the Cardigan Bay coast access key services. Aberaeron to the south plays a similar role and is a key administrative and tourist hub.



Policy 7 sets out the national strategic approach to delivering affordable homes and ensures the focus of funding and housing policies is on driving increased provision. Planning and co-ordinating the delivery of new housing to meet identified needs is an important task for the regional planning process. Under the Welsh Government central estimates 1,800 additional homes are needed in the region until 2039 and over the initial five years (2019-20 to 2023-24) 61% 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. Understanding and managing different development pressures across the region will be a key issue for Strategic Development Plans. Strategic housing issues must be considered at the regional level and not on the basis of the aspirations of individual local planning authorities.

In considering future housing needs, it is clear that all aspects of a Strategic Development Plan and individual Local Development Plans will need to reflect on the low estimated need for housing in the region and what this means for how places will change, where jobs and services will be located and the relationship between settlements.

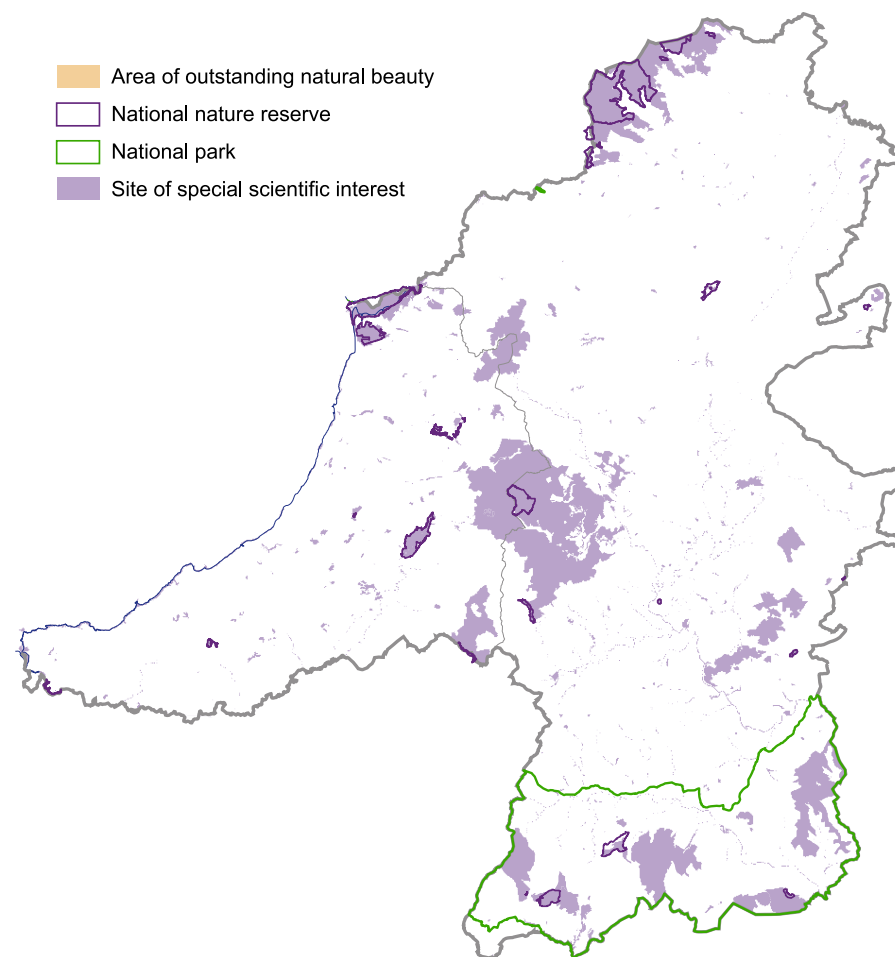
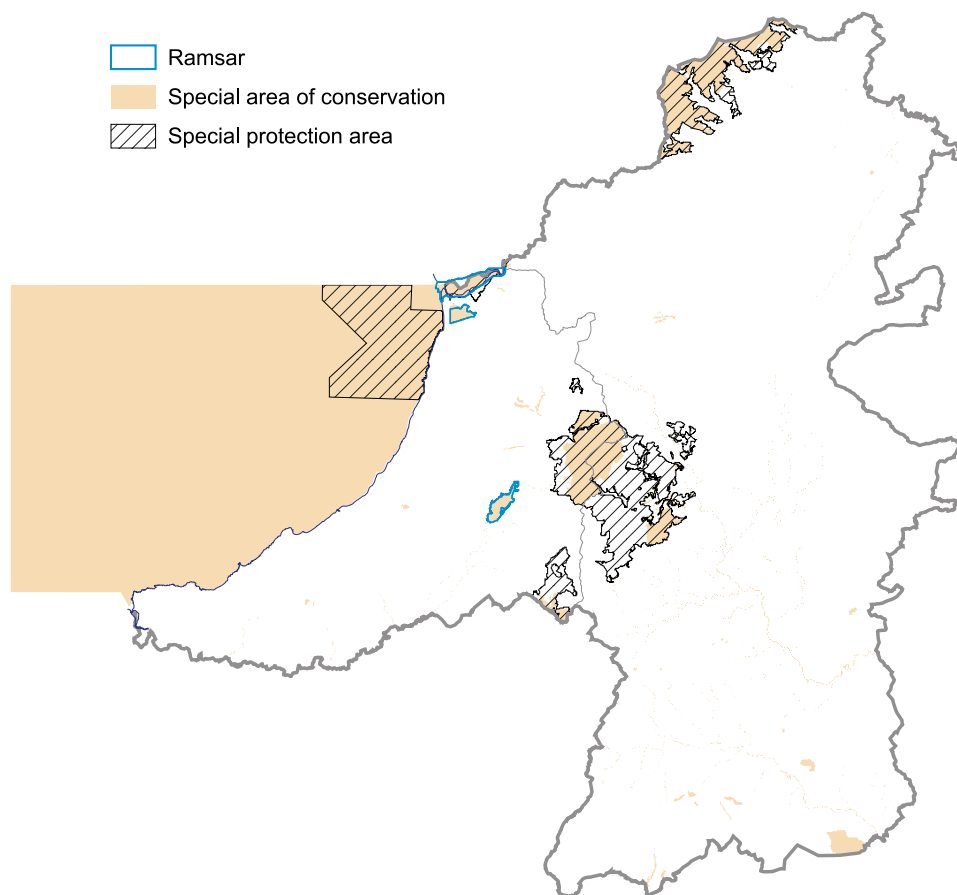
Policies 2, 3, 6 and 8 will ensure development in the region's towns is sustainably located in areas with good access to public transport where reliance on the car can be reduced. Opportunities for publicly-owned land to be used to demonstrate leadership through placemaking are strongly supported. Strategic decisions on the location of key services and infrastructure should support existing settlements and be

taken on a regional basis, ensuring they are located in the most accessible and sustainable locations, support actions to address inequality and deprivation and improve links to neighbouring areas of Wales and England.

The region's rural areas are supported by policies 4 and 5 which will ensure rural communities thrive, supported by a rural economy which recognises the diverse range of activity that contribute to rural society and life. The Welsh Government wishes to see extensive and fast broadband connectivity across Mid Wales. Policies 13 and 14 set out the national strategic approach and will ensure existing areas of poor coverage are the main focus for improvement. With homeworking increasing as a proportion of economic activity, improved broadband will be key to enabling Mid Wales to broaden its economic base and benefit socially and economically. In accordance with policy 4, the Welsh Government believes the future for rural areas is best planned at the regional and local level. Strategic and Local Development Plans will plan positively for the rural communities in the region and consider the balance to be struck between focusing development in the main built-up, urban areas and the rural areas.

The Welsh Government wishes to see biodiversity enhanced and ecosystems become more resilient across Mid Wales. Policies 9 and 15 set out the national strategic approach and will ensure action to address the climate emergency, to reverse biodiversity decline and to ensure the well-being of communities takes place. These policies require consideration be given to the type of action necessary at regional and local levels and how this can be facilitated through Strategic and Local Development Plans.

## Designated Natural Environment in Mid Wales



Investment in creating resilient ecological networks and green infrastructure will bring multiple benefits for communities and businesses as well as nature itself. Action to improve resilience is required in all areas of the region and specific approaches will vary depending on the nature of the location and the opportunities to create greater resilience. Where there are conflicting priorities these will need to be considered and resolved regionally and locally. Policies 2, 3, 4 and 5 must work in a complementary way with policies 9 and 15.

In urban areas, including Regional Growth Areas, the enhancement (net-benefit) of biodiversity and the provision of green infrastructure must both shape growth strategies and be fully integrated as part of location and design solutions for proposed development.

Based on the indicative map that supports policy 9, the most resilient ecological networks are in the most southerly and northerly parts of the region and in the south west of the region, but this does not mean they are as resilient as they ought to be. Whilst there are biodiversity hotspots, carbon stores, woodland and forestry in the heart of the Mid Wales region, improvement in the overall resilience of the region is needed. The role of the Brecon Beacons National Park as a node for improving resilience and deriving multiple benefits from green infrastructure should be maximised along with designated nature conservation sites. Area Statements indicate widespread potential for improvements in ecosystem services and the creation of ecological networks across the region.

It will be of crucial importance that habitats protection, restoration and creation and improved linkages between them are facilitated through Strategic and Local Development Plans. Policy 9 requires that networks be improved and expanded upon and that opportunities must be identified to safeguard and create resilient networks, and the ecosystem services on which they depend, and the multiple benefits derived from green infrastructure where currently this is not the case. Policies 9 and 15 work alongside policy 4 and 5 to require relationships between all forms of land use and management be considered more fully. This is especially the case in Mid Wales if we are to address the climate emergency, reverse biodiversity decline and enable communities to benefit from more sustainable forms of managing natural resources.

Flooding is a potential risk for coastal and inland places in the region. Major rivers including the Teifi, Usk, Wye and Severn flow through Regional Growth Areas. They have the potential to break their banks in periods of heavy rainfall and be the source of flooding elsewhere. Coastal locations, including Aberystwyth, have experience of storms causing coastal defences to be overtopped. The potential for flooding in the Regional Growth Areas has implications for the delivery of growth in the region. Policy 8 sets out the national strategic approach to flood risk management and will ensure growth aspirations in Regional Growth Areas are co-ordinated with strategic decisions on managing flood risk.



## Managing Growth



### Policy 26 – Growing the Mid Wales Economy



The Welsh Government supports the growth and development of existing and new economic opportunities across Mid Wales.

The Welsh Government will work with local authorities, communities, stakeholders and businesses to ensure that its investments and policies support a strong regional economy.

Strategic and Local Development Plans must develop policies that support agricultural and land based traditional rural enterprises; and provide a flexible framework to support the development of new, innovative and emerging technologies and sectors.

The Welsh Government wishes to see a strong and resilient economy and sustainable, rural communities across Mid Wales. Policy 5 sets out the national strategic approach to supporting rural economies. The economy of Mid Wales will be based on both traditional rural enterprises and modern, forward looking, innovative businesses. The region's wealth of outstanding natural assets, existing research capability and the growth potential of existing industrial clusters within the advanced manufacturing sector can support growth. With its strong communities, outstanding landscapes, high quality of life and diverse range of places, Mid Wales is an attractive region and can be the location of choice for dynamic and technologically advanced businesses while continuing to support its traditional rural sectors.

The Regional Economic Framework, prepared in partnership with local authorities, communities, businesses 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, has a major role to play in shaping the places that support and strengthen the regional economy.

A strengthened regional approach to planning should be informed by and seek to facilitate the delivery of the Mid Wales Growth Deal. A Strategic Development Plan should 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. It should also consider how traditional and new economic sectors can be supported across Mid Wales and be open to exploring the role of both existing and new types of employment areas. It should also recognise opportunities for the development of economic clusters, where businesses choose to locate in close proximity for mutual benefit, and whether there is a need for further infrastructure investment to support this. A Strategic Development Plan should consider the potential for the expansion and growth of key regional sectors, including defence and security, animal health and veterinary science, bio-technology and agri-tech. An understanding of the types of sites and infrastructure these sectors will require in the future is important and should harness the potential of key regional assets such as the Aberystwyth Innovation and Enterprise Campus.

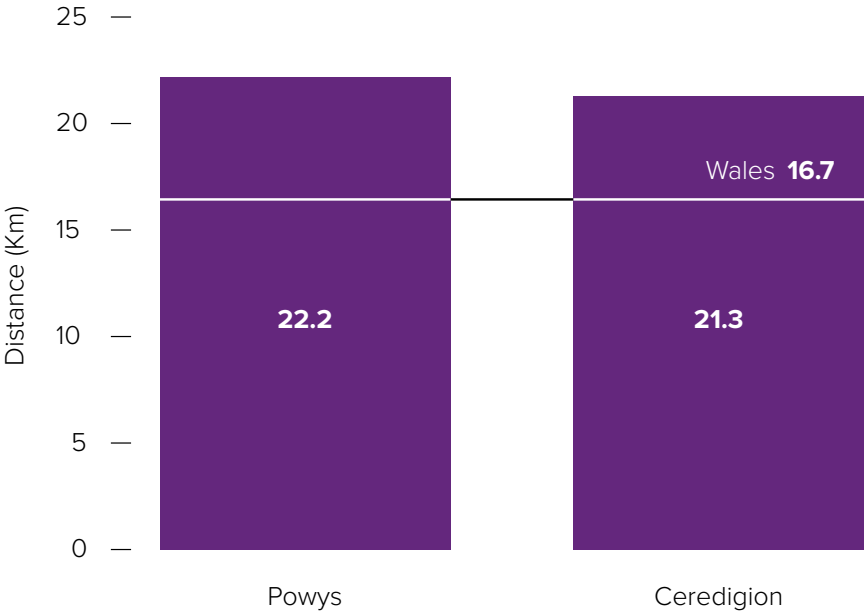
The Welsh Government strongly supports the development of the foundational economy in the region. The foundational economy represents those parts of the economy which are integral to the well-being of places, communities and people and which deliver people's everyday needs. The Welsh Government will continue to support greater resilience for local and regional economies and support business growth and new employment opportunities. Strategic and Local Development Plans should identify the role of the foundational economy, consider how the land-use planning system can support it and develop appropriate policies. Areas of the foundational economy which the planning system can support include regeneration initiatives, health and social care, social housing, tourism and steps to encourage greater community benefits from new development.

Tourism is an important sector to the Mid Wales economy. Opportunities for active, green and cultural tourism should be explored. The rich landscape, cultural heritage and marine fauna, the Coastal Way along the length of Cardigan Bay, the inland Cambrian Way and the Wales Coast Path provide the potential to develop tourism facilities inland and at the coast. Strategic and Local Development Plans should consider the main existing and potential new tourism areas, the type of visitors they attract and the infrastructure required to support growth.



The universities in Aberystwyth and Lampeter are an important presence in Mid Wales, providing further education, undertaking research and supporting innovation, providing employment, attracting students and supporting the local businesses and communities around them. Strategic and Local Development Plans should consider their role in the region and how they can play a bigger role in supporting the regional economy, innovation and their communities.

**Average distance travelled to work (Km) by workers aged 16–74 in 2011, by local authority of residence**



It is vital the region plays its role in the decarbonisation of society and supports the realisation of renewable energy. Policies 17 and 18 set out Future Wales’ approach to renewable energy generation across Wales. There is significant potential for wind, marine and solar energy generation in Mid Wales and Strategic and Local Development Plans should provide a framework for generation and associated infrastructure. All renewable energy generation proposals should seek to maximise the economic, environmental and social benefits to the communities of Mid Wales. The Welsh Government wishes to see energy generation, storage and management play a role in supporting the Mid Wales economy in particular, including local employment opportunities. Local ownership and distribution is important to ensuring communities in proximity to renewable energy development benefit from it and that our future energy system better serves Wales.

Ceredigion and Powys form part of the South Wales area for minerals planning. In Powys a number of sandstone and igneous rock quarries supply High Specification Aggregate material to England, particularly to adjoining parts of the West Midlands. The availability of marine aggregates and the infrastructure to support the extraction and movement of these aggregates is important and the region will continue to play a key role in meeting national and regional needs.



## Supporting Growth



### Policy 27 – Movement in Mid Wales



The Welsh Government will work with local and regional authorities to ensure transport investments improve accessibility across Mid Wales and strengthen cross-border transport links.

Strategic and Local Development Plans should support improved transport links within the region and with other regions and England. Planning authorities should plan growth and regeneration to maximise the potential opportunities arising from better regional connectivity.

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Across Wales and the regions, the Welsh Government wishes to see development built in sustainable locations that are supported by the active travel and public transport infrastructure and services needed to enable people to live active and healthy lives. This includes ensuring average levels of air and noise pollution are reduced or at least minimised. The overall aim is to reduce the need to travel, particularly by private vehicles, and support a modal shift to walking, cycling and public transport. Policies 11 and 12 set out the strategic approach to national and regional connectivity and how the Welsh Government will support and invest in improvements to active travel and public transport. In rural areas, such as Mid Wales, our priorities are also aimed at supporting the uptake of ultra-low emission vehicles and diversifying and sustaining local bus services.

Mid Wales is the largest region and adjoins the three other Welsh regions. It shares a long border with England and is accessible to a wider English region that includes Hereford, Shrewsbury, Telford and Birmingham. The Welsh Government recognises that travel by road and car is central to regional

movement across Mid Wales. Alongside its investment to support increased use of public transport (including rail) and active travel, we will continue to invest in the region's road network and, in accordance with policy 12, support the uptake of ultra-low emission vehicles. Where new transport corridors are created by improvements to the road network, the potential for these corridors to incorporate green infrastructure must be explored.

West-east connections are important. Cross-border working is supported, such as the joint freight strategy and route improvements to the A483 and A458. In addition to maximising the growth of the Mid Wales economy, 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 in other regions and England. Focusing investment and action on improving the links between Welsh communities and economic opportunities outside the region can help support the region's communities and the development of a stronger economy.







# SOUTH WEST



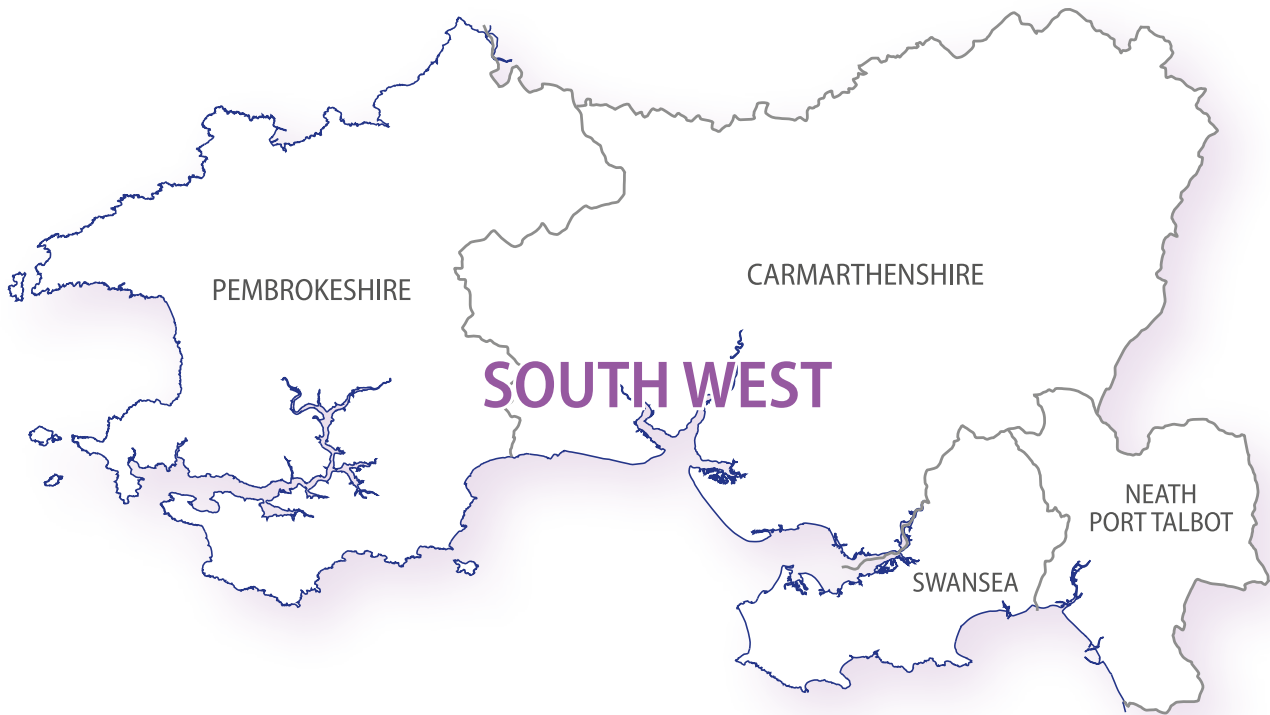
## Overview

The South West region comprises **Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea and Pembrokeshire Coast National Park** and has a population of over **700,000 people**. This large and diverse region includes extensive rural areas and urbanised, industrialised built-up areas around Wales' second city, Swansea.

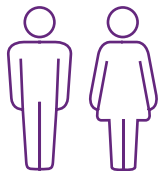
The regional issues that planning authorities should work together to plan for are set out alongside the spatial policy areas the Welsh Government will focus on to support the South West region.

With **147,864 Welsh speakers** across the region and with concentrations of settlements where Welsh is the first language for many people, it is important that Strategic and Local Development Plans consider the relationship between strategic housing, transport and economic growth and the Welsh language. Strategic and Local Development Plans should contain settlement hierarchies and growth distribution policies that create the conditions for Welsh to thrive and remain as the community language in the many places where everyday life takes place in Welsh.





Population



Approx

**702,000**

Largest:  
Swansea  
**246,500**

Smallest:  
Pembrokeshire  
**125,000**

Population  
change



**8.7%**

increase from 1998–2018

Largest: Pembrokeshire **11.8%**  
Lowest: Neath Port Talbot **5%**

Health



**69%**

of people aged 16 and over  
reporting good or very good  
general health 2017–18 and  
2018–19 (age standardised)

Welsh  
language



**31.8%**

of people speak Welsh

A **5.4%** increase  
since 2009

Age



**21.9%**

of people 65 and over

An increase from  
**18.7%** in 1998

Transport



**17.95Km**

Average distance people  
travel to work

# Strategic Development Plan: A regional approach

**Across the South West region there are a range of strategic issues. Many of these issues have national, regional and local dimensions and will be delivered through co-ordinated action at all levels.**

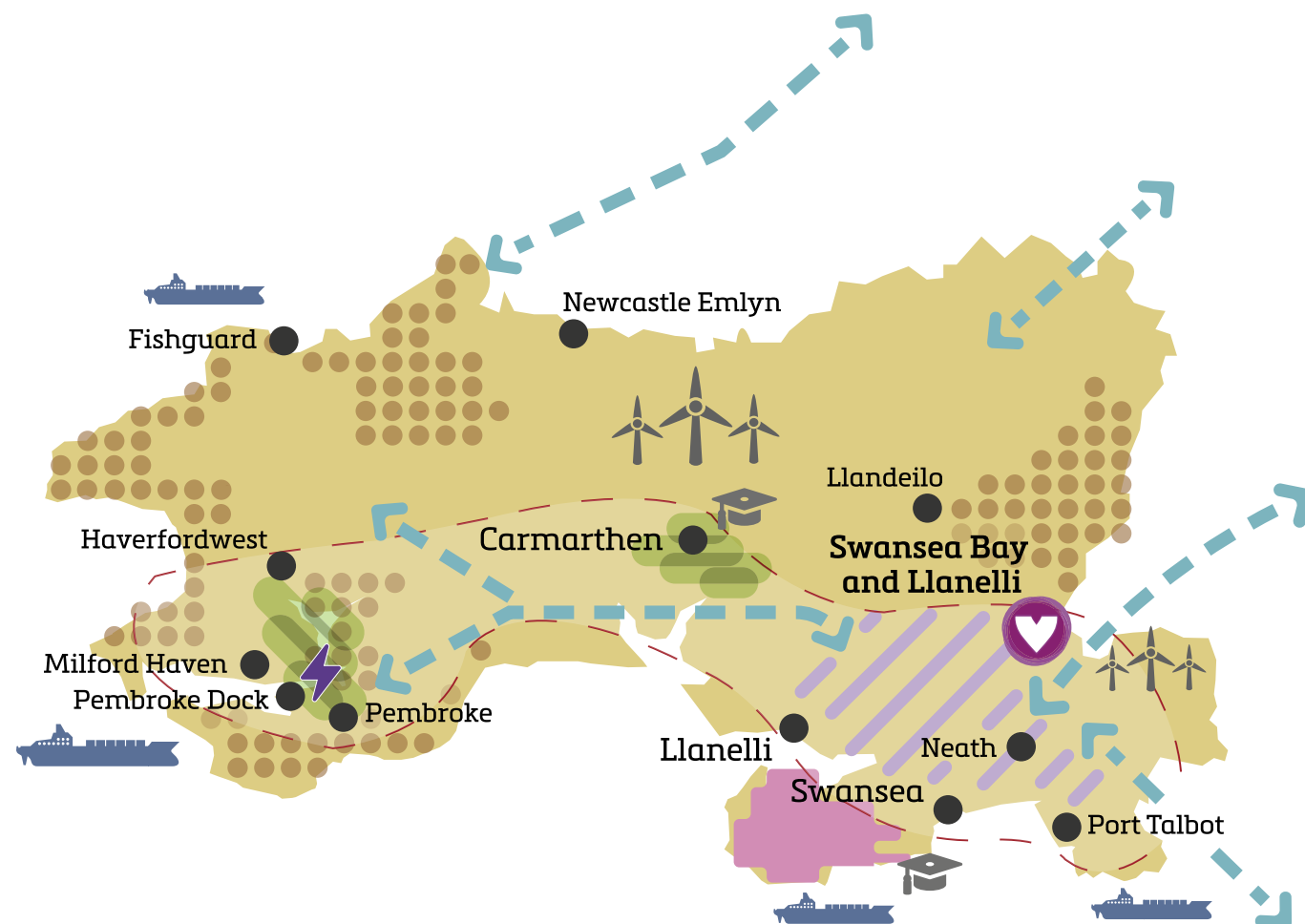
Housing, economic growth, digital and transport connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources, flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonising society and responding to the threats of the climate emergency 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, address congestion, reduce car-based commuting and improve air quality.

The region should consider its connections with the Mid Wales and South East regions and Ireland. Promoting accessibility and inter-linkages between Welsh regions, 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.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan

### Regional strategic diagram



National Growth Area	
Regional Growth Area	
National Connectivity	
Ports	
South West Metro	
Areas of Outstanding Natural Beauty	
Energy at the Haven Waterway	
National Parks	
Valleys Regional Park	
Pre-assessed Areas for Wind Energy	
Universities	



## National Growth



### Policy 28 – National Growth Area – Swansea Bay and Llanelli



Swansea Bay and Llanelli will be the main focus for growth and investment in the South West region.

Strategic and Local Development Plans should recognise the National Growth Area as the focus for strategic economic and housing growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure.

The Welsh Government will work with regional bodies and local authorities to promote and enhance Swansea Bay and Llanelli's strategic role and ensure key investment decisions support places in the National Growth Area and the wider region.

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Policy 1 is the overarching framework for where development and growth will be focused in each region. Future Wales' spatial strategy identifies that growth in the South West region should be focused in the Swansea Bay and Llanelli area. The area comprising Neath, Port Talbot, the City of Swansea and Llanelli will be 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.

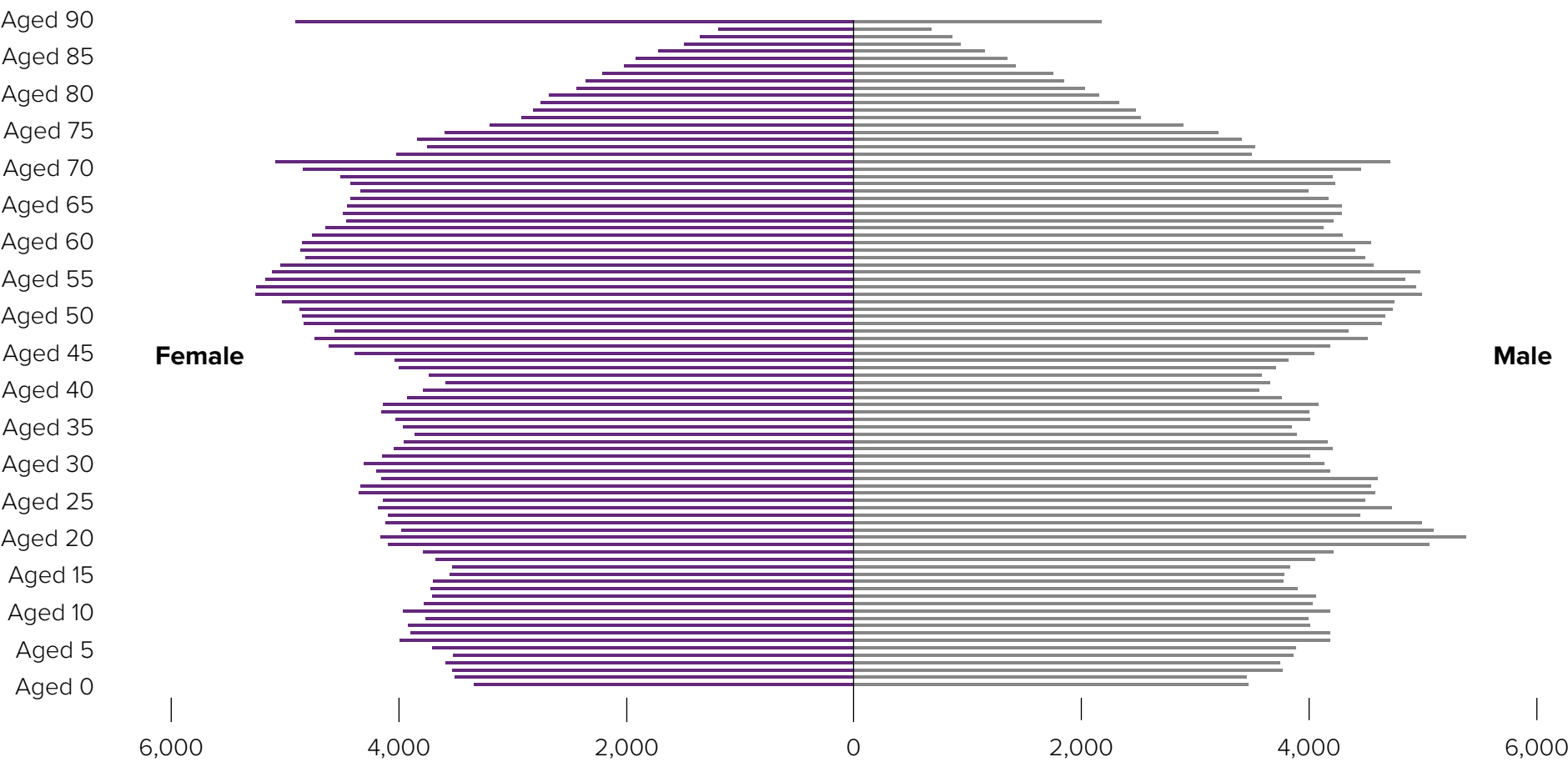
In accordance with policy 19, the preparation of a Strategic Development Plan must ensure the region manages growth in a planned and co-ordinated way, to support the needs of the National and Regional Growth Areas and the wider region. Strategic decisions on the location of key services and infrastructure should support existing settlements and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations, support actions to address inequality and deprivation and improve links to adjoining regions.

Policy 7 sets out the national strategic approach to delivering affordable housing and ensures the focus of funding and housing policies is on driving increased provision. Planning and co-ordinating the delivery of new housing to meet identified needs is an important task for the regional planning process. Under the Welsh Government central estimates 25,600 additional homes are needed in the region until 2039 and over the initial five years (2019-20 to 2023-24) 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. Understanding and managing different development pressures across the region will be a key issue for Strategic Development Plans. Strategic housing issues must be considered at the regional level and not on the basis of the individual local planning authorities.





Population distribution in South West Wales by age and gender, 2018





## Regional Growth



### Policy 29 – Regional Growth Areas – Carmarthen and the Haven Towns

The Welsh Government supports sustainable growth and regeneration in Carmarthen and the Pembrokeshire Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock). These areas will be a focus for managed growth, reflecting their important sub-regional functions and strong links to the National Growth Area of Swansea Bay and Llanelli.

Strategic and Local Development Plans should recognise the roles of these places as a focus for housing, employment, tourism, public transport and key services within their wider areas and support their continued function as focal points for sub-regional growth.

Carmarthen and the four Pembrokeshire Haven Towns (Milford Haven, Haverfordwest, Pembroke and Pembroke Dock) have important sub-regional roles. Development in these towns will ensure they continue to provide jobs, leisure, retail and cultural opportunities, 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 Strategic and Local Development Plans adopt a managed growth approach that allows their roles to be enhanced.

Development in Swansea Bay and Llanelli will support our national growth strategy and this will be complemented by additional growth in the Carmarthen and the Pembrokeshire Haven towns by policy 1. The sustainable growth of these places will be supported by policies 2, 3, 6 and 8 which will ensure development is located in a sustainable, accessible way which ensures good places are created to support communities where public land will be used to demonstrate best practice.

Policies 4 and 5 will help to ensure that rural areas in the South West grow in an appropriate way, supporting rural economies and services. In accordance with policy 4, the Welsh Government believes the future for rural areas is best planned at the regional and local level. Strategic and Local Development Plans will plan positively for the rural communities in the region and consider the balance to be struck between focusing development in the main built-up, urban areas and the rural areas. Gaps in digital or mobile connectivity will be addressed through policies 13 and 14 to ensure that services are improved.

The South West supports a large and diverse tourism industry and the sector is important to the region's economy. Opportunities to develop the visitor economy, to promote the world-class coastal areas and beaches and major leisure attractions should be explored. The national parks are a major asset for the region, attracting visitors from around the world. Strategic and Local Development Plans should consider the main existing and potential new tourism areas, the type of visitors they attract and the infrastructure required to support growth.

They should provide a positive framework to enable 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.

The universities in Swansea and Carmarthen are an important presence in the region, providing further education, undertaking research and supporting innovation, creating employment, attracting students and supporting the local businesses and communities around them. Strategic and Local Development Plans should consider their role in the region and how they can play a bigger role in supporting the regional economy, innovation and their communities.

The Regional Economic Framework, prepared in partnership with local authorities, communities, businesses 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, has 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 Deal and Economic Regeneration Strategy and 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. The Strategic Development Plan should also consider how traditional and new economic sectors can be supported and be open to exploring the role of both existing and new types of employment areas.

It should also recognise opportunities for the development of economic clusters, where businesses choose to locate in close proximity for mutual benefit, and whether there is a need for further infrastructure investment to support this.

The Welsh Government strongly supports the development of the foundational economy in the region. The foundational economy represents those parts of the economy which are integral to the well-being of places, communities and people and which deliver people's everyday needs. The Welsh Government will continue to support greater resilience for local and regional economies and support business growth and new employment opportunities. Strategic and Local Development Plans should identify the role of the foundational economy, consider how the land-use planning system can support it and develop appropriate policies. Areas of the foundational economy which the planning system can support include regeneration initiatives, health and social care, social housing, tourism and steps to encourage greater community benefits from new development.

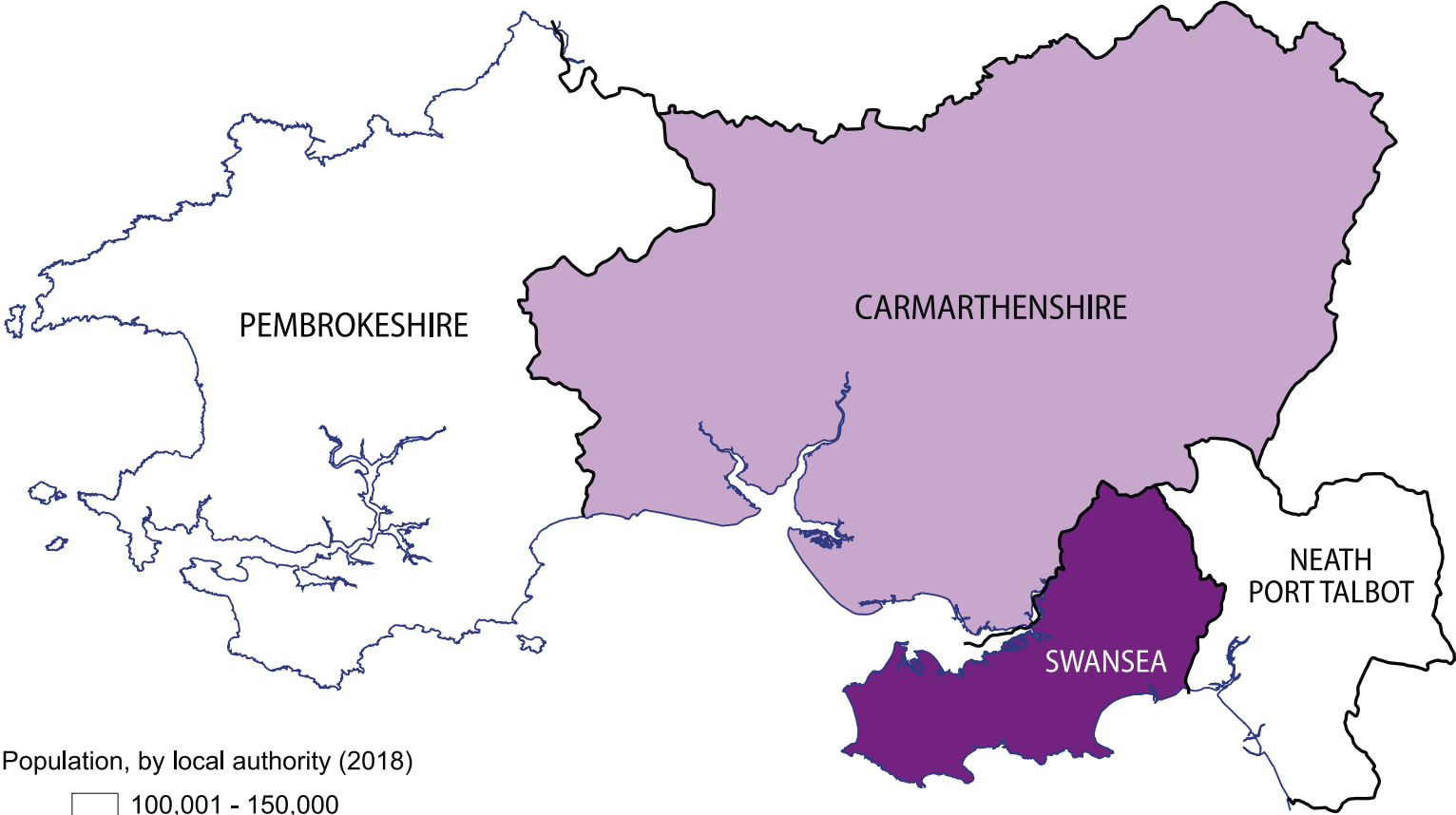
The Welsh Government wishes to see biodiversity enhanced and ecosystems become more resilient across the South West. Policies 9 and 15 set out the national strategic approach and will ensure that action to address the climate emergency, to reverse biodiversity decline and to ensure the well-being of communities takes place. These policies require consideration be given to the type of action necessary at regional and local levels and how this can be facilitated through Strategic and Local Development Plans.

Investment in creating resilient ecological networks and green infrastructure will bring multiple benefits for communities and businesses as well as nature itself. Action to improve resilience is required in all areas of the region and specific approaches will vary depending on the nature of the location and the opportunities to create greater resilience. Where there are conflicting priorities these will need to be considered and resolved regionally and locally. Policies 2, 3, 4 and 5 must work in a complementary way with policies 9 and 15.

In urban areas, including the National Growth Area of Swansea Bay and Llanelli and in Regional Growth Areas, the enhancement (net-benefit) of biodiversity and the provision of green infrastructure must both shape growth strategies and be fully integrated as part of location and design solutions for proposed development. Policies 11 and 12 provide opportunities to create corridors of green infrastructure and in the Llanelli area potential opportunities for woodland habitat improvement and creation should be explored.







Population, by local authority (2018)

- 100,001 - 150,000
- 150,001 - 200,000
- 200,001 and over

Source: Mid-year population estimates,  
Office for National Statistics

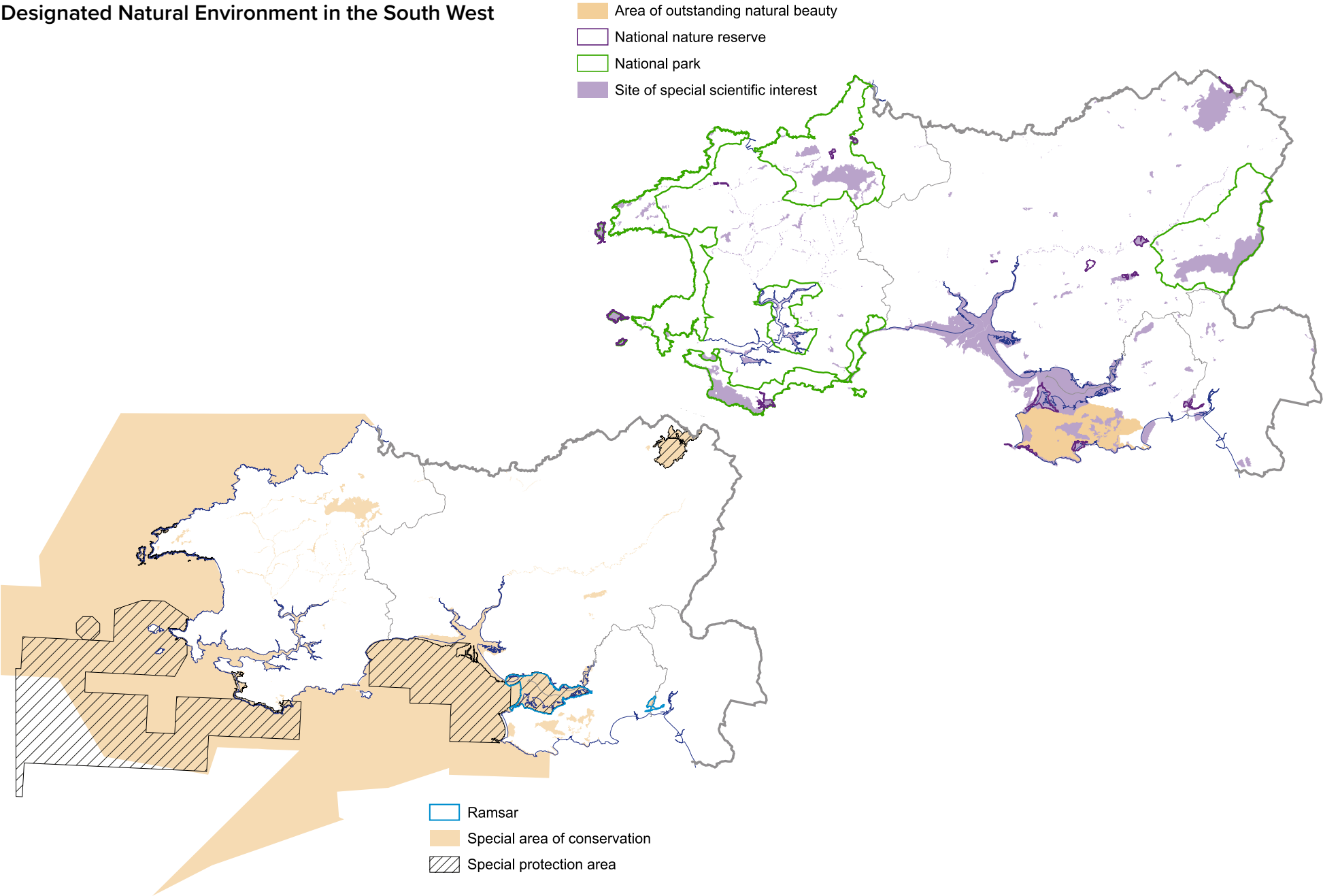
Based on the indicative map that supports policy 9, the most resilient ecological networks are in the eastern part of the region and in the south west of the region, but this does not mean they are as resilient as they ought to be. There are large areas which appear as resilience ‘gaps’ in the indicative map across Carmarthenshire and Pembrokeshire, including the coastline; however Area Statements indicate widespread potential for improvements of ecosystems services and the creation of ecological networks across the whole region.

It will be of crucial importance that linkages between east and west, north and south and along the coast are strengthened in the region through Strategic and Local Development Plans. Policy 9 requires that existing networks be improved and expanded upon and that opportunities must be identified to safeguard and create resilient networks, and the ecosystem services on which they depend, and the multiple benefits derived from green infrastructure where currently this is not the case. This includes considering the role of protected landscapes and nature conservation designations. Policies 9 and 15 work alongside policy 4 and 5 to require that the relationships between all forms of land use and management should be considered more fully, and this is especially the case in the large rural parts of the South West, if we are to address the climate emergency, reverse biodiversity decline and enable communities to benefit from more sustainable forms of managing natural resources.

The region experiences flooding from rivers and the sea, although places in the National and Regional Growth Areas are generally resilient, due to their strategic location and the effectiveness of existing flood risk management infrastructure. Large rivers across the region, including the Cleddau, Tywi, Tawe and Neath have extensive functional flood plains that ensure the risk to centres of population is well managed. The Swansea Bay and Llanelli National Growth Area is a coastal area and though there are coastal defences in place, many areas remain vulnerable to overtopping and coastal flooding. The potential for flooding in the National and Regional Growth Areas has implications for the delivery of growth in the region. Policy 8 sets out the national strategic approach to flood risk management and will ensure growth aspirations in the National and Regional Growth Areas are co-ordinated with strategic decisions on managing flood risk.

It is vital the region plays its role in decarbonisation and supports the realisation of renewable energy. Policies 17 and 18 set out Future Wales’ approach to renewable energy generation across Wales. There is strong potential for wind, marine and solar energy generation and Strategic and Local Development Plans should provide a framework for generation and associated infrastructure. The Welsh Government wishes to see energy generation, storage and management play a role in supporting the South West economy. Local ownership and distribution is important to ensuring communities in proximity to renewable energy development benefit from it and that our future energy system better serves Wales.

Designated Natural Environment in the South West





## Managing Growth



### Policy 30 – Green Belts in the South West



The Welsh Government supports the use of Strategic Development Plans to identify and establish green belts to manage urban form and growth in the South West, particularly around Swansea Bay and Llanelli.

Strategic decisions on the location of development, key services and infrastructure should support the region and be taken on a regional basis, ensuring they are located in the most accessible and sustainable locations.

The Welsh Government is supportive of the region should the Strategic Development Plan determine that a green belt is required to manage growth, particularly the national growth required by Future Wales' spatial strategy around Swansea Bay and Llanelli. Planning Policy Wales sets the context for establishing green belts.

The South West has extensive rural areas and well established rural communities. The Strategic Development Plan for the region should consider the balance to be struck between focusing development in the main urban areas and the rural areas. Decisions on the delivery of key services can have a profound effect on people's daily lives, particularly the less mobile, and it is essential these decisions are taken on the basis of a clear understanding of their impacts. As well as schools and health facilities access to services like banks, post offices, libraries and shops can have a real impact on people's daily lives in rural areas.

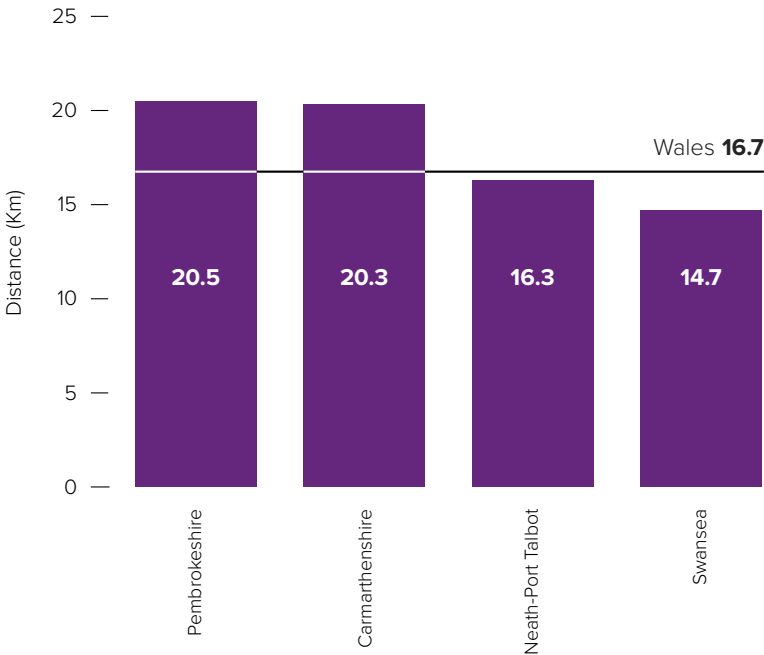
Strategic and Local Development Plans should consider the impacts of population change on their rural communities. The societal issues that drive these changes are wider than the planning system and are not easy challenges to address. The Welsh Government wishes to see Local Development Plans in the South West play a central role in shaping how rural communities sustain themselves. Local Development Plans should seek to support growth and appropriate development in rural towns and villages. This includes affordable and market housing, employment and the provision of services. Local Development Plans should support and co-ordinate their decisions with those of economic policy-makers, health, education and other essential service providers. They should consider the needs of all residents, including older people and people with disabilities, and ensure that specialist housing provision is considered and planned for.

Managing the South West's outstanding natural resources, which include the coast, Pembrokeshire Coast National Park, the Gower Area of Outstanding Natural Beauty, minerals, agricultural land, water and a high quality landscape, 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.

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, supplying sand and gravel mainly for local markets.

Average distance travelled to work (Km) by workers aged 16–74 in 2011, by local authority of residence



## Supporting Growth



### Policy 31 – South West Metro



The Welsh Government supports the development of the South West Metro and will work with Transport for Wales, local authorities and other partners to enable its delivery and maximise associated opportunities.

Strategic and Local Development Plans should support the South West Metro. Planning authorities should plan growth and regeneration to maximise the potential opportunities arising from better regional connectivity, including identifying opportunities for higher density, mixed-use and car-free development around new and improved metro stations.

Across Wales and the regions, the Welsh Government wishes to see development built in sustainable locations supported by active travel and public transport infrastructure and services to enable people to live active and healthy lives. This includes ensuring levels of air and noise pollution are reduced or at least minimised. The overall aim is to reduce the need to travel, particularly by private vehicles, and support a modal shift to walking, cycling and public transport. Policies 11 and 12 set out the strategic approach to national and regional connectivity and how the Welsh Government will support and invest in improvements to active travel and public transport.

In the South West region, the rail infrastructure and services are fundamental to an effective and efficient transport network and central to improving regional and national connectivity. The South West Metro provides an opportunity to improve accessibility across the region and is supported by the Welsh Government. There are strong functional relationships between settlements within the region and with neighbouring regions, with people travelling daily to access jobs, services and facilities. The South West Metro will provide better connectivity

within the South West and look to improve connections across South Wales into England.

Facilitating access to the Metro by active travel will make an important contribution to modal shift from car to public transport journeys at a regional level. Achieving this will require high quality active travel routes linking neighbourhoods and trip destinations with metro stations. The provision of high quality, secure cycle parking at interchanges will also be essential.

The Strategic Development Plan should seek to improve connectivity across the region and should consider long-term proposals such as the South West Metro scheme which can provide a basis for better integrating land-use and transport planning. In accordance with policy 12, Strategic and Local 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.









## Policy 32 – Haven Waterway and Energy



The Welsh Government supports operations at Haven Waterway, and recognises its location for potential new renewable and low carbon energy-related development, innovation and investment.

New energy-related development should support local and regional communities and provide jobs and investment in training and skills.

In determining any applications for energy proposals, consideration should be given to the contribution it will make to decarbonising energy supplies, the impacts on the landscape, seascapes, natural and historic environment and the economic benefits they would bring to the region.

On-shore developments associated with off-shore renewable energy projects will be supported in principle.

The Haven Waterway has a unique combination of a natural harbour, deep water access, long established industries and the potential for new strategic development, including renewable and low carbon energy. Strategic and Local Development Plans should recognise this and provide a framework for managing future growth.

The Haven Waterway is critically important to the future energy security of the UK. There are a number of long established energy installations in the Haven and there is potential for new strategic energy development, including

innovative decarbonisation and marine energy projects. Some developments will be located in the marine environment, and the role of development plans is to enable appropriate on-shore development to support such schemes, including cable landfall sites.

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. These ports are important national infrastructure and supporting their future role locally, regionally and nationally is a key consideration.



# SOUTHEAST



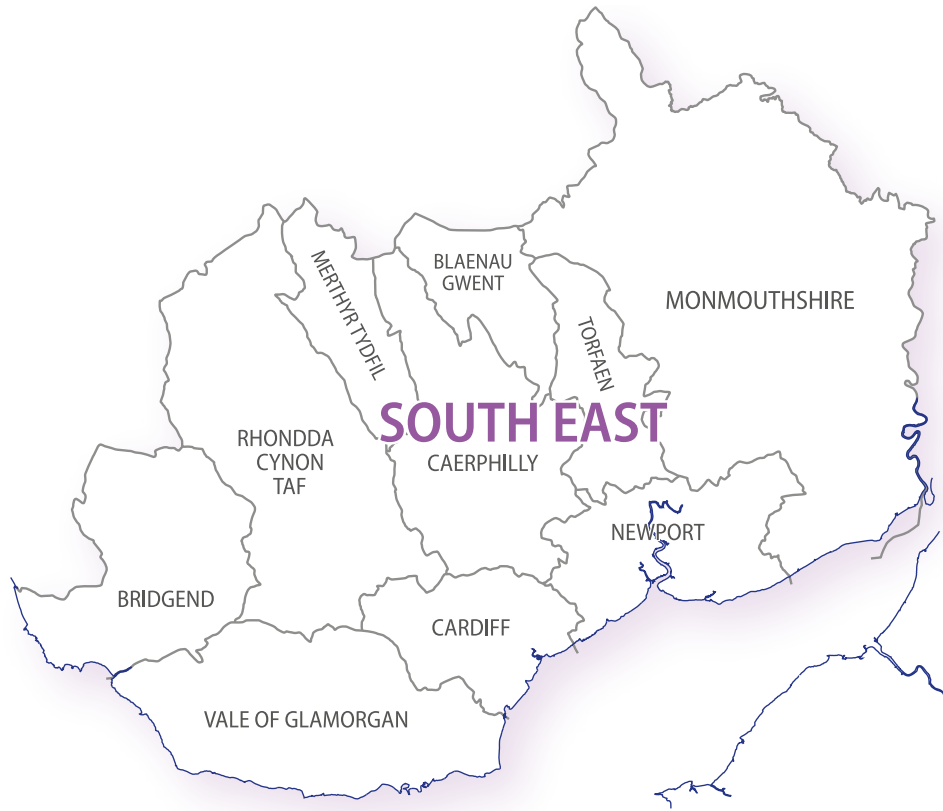
## Overview

The South East 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 large city region on a European and UK scale. The region is the smallest of the four regions by area and includes the coastal cities of Cardiff and Newport and the former industrial heartlands of the south Wales valleys.

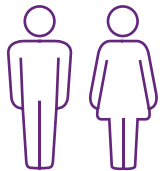
The regional issues that planning authorities should work together to plan for are set out alongside the spatial policy areas that the Welsh Government will focus on to support the South East region.

With **150,792 Welsh speakers** across 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. Strategic and Local Development Plans should contain settlement hierarchies and growth distribution policies that create the conditions for Welsh to thrive across the region and encourage the development of communities where Welsh can be the everyday language.





Population



Approx

**1,530,000**

Largest:

Cardiff

**364,000**

Smallest:

Merthyr Tydfil

**60,000**

Population  
change



**9.6%**

increase since 1998–2018

Largest: Cardiff **18%**

Lowest: Blaenau Gwent **-2.2%**

Health



**70%**

of people aged 16 and over  
reporting good or very good  
general health 2017–18 and  
2018–19 (age standardised)

Welsh  
language



**20.2%**

of people speak Welsh

A **2.7%** increase  
since 2009

Age



**18.5%**

of people 65 and over

an increase from  
**16%** in 1998

Transport



**15.77Km**

Average distance people  
travel to work

# Strategic Development Plan: A regional approach

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

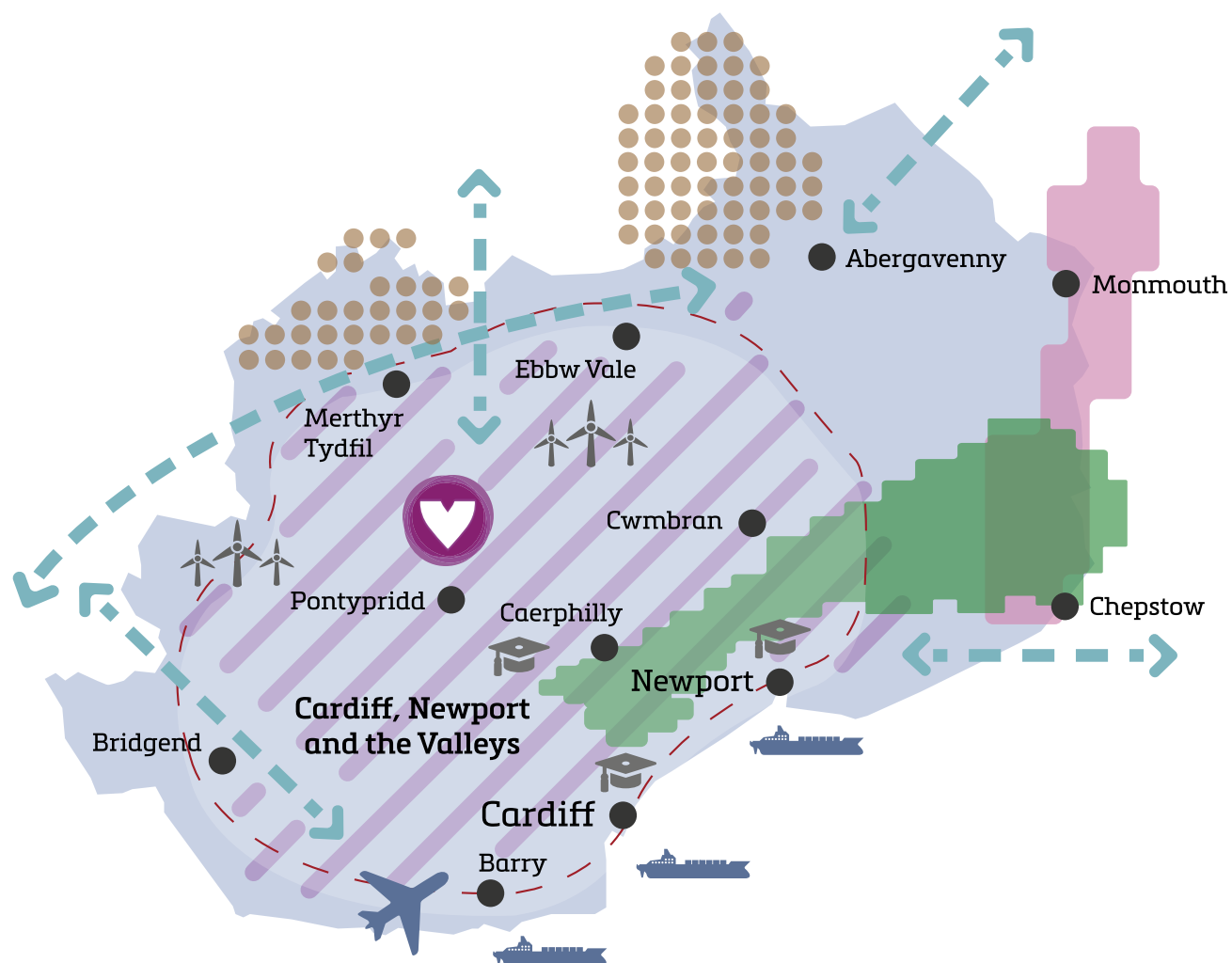
Housing, economic growth, digital and transport connectivity infrastructure should be co-ordinated and planned on the basis of the whole region. The management of natural resources, flooding and the protection and enhancement of areas of environmental and landscape importance should inform strategic decisions on locations for growth and new infrastructure. Decarbonisation and responding to the threats of the climate emergency 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, address congestion, reduce car-based commuting and improve air quality.

The region should consider its connections with the Mid Wales and South West regions and the West of England region. 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.

Clear decisions should be made on the scale and location of growth through the preparation of a Strategic Development Plan

## Regional strategic diagram



National Growth Area



National Connectivity



Ports



Green Belt – Areas for Consideration

Area of Outstanding  
Natural Beauty

National Parks



Valleys Regional Park



South East Metro



Cardiff Airport

Pre-assessed Areas for  
Wind Energy

Universities





## National Growth



### Policy 33 – National Growth Area – Cardiff, Newport and the Valleys

Cardiff, Newport and the Valleys will be the main focus for growth and investment in the South East region.

Strategic and Local Development Plans should recognise the National Growth Area as the focus for strategic economic and housing growth; essential services and facilities; advanced manufacturing; transport and digital infrastructure.

The Welsh Government will work with regional bodies and local authorities in the region and in neighbouring regions of England to promote and enhance Cardiff, Newport and the Valleys' strategic role and ensure key investment decisions support places in the National Growth Area and the wider region.

The Welsh Government supports Cardiff's status as an internationally competitive city and a core city on the UK stage. 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 an increased strategic role for Newport as a focus for sustainable, long-term growth and investment. 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.

The Welsh Government supports co-ordinated regeneration and investment in the Valleys area to improve well-being, increase prosperity and address social inequalities. The Welsh Government will work with regional bodies, 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 socio-economic issues in the Valleys.

The Welsh Government supports development in the wider region which addresses the opportunities and challenges arising from the region's geographic location and its functions as a Capital Region.

In accordance with Future Wales' spatial strategy, growth in the South East region should primarily be focused in Cardiff, Newport and the Valleys. Policy 1 is the overarching framework for where development and growth will be focused in each region.

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 maximise the strength of the region.

Cardiff has experienced a period of growth in population and employment. It is a compact city which is defined by Caerphilly and Garth mountains to the north, the Bristol Channel to the south and the first statutory green belt in Wales to the east. Cardiff must generate and support regional growth throughout the South East while enhancing its status as a vibrant capital city of Wales. 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

### Population distribution in South East Wales by age and gender, 2018



opportunities for development in settlements outside the city. The cultural and economic strength of Cardiff must generate region-wide prosperity and well-being.

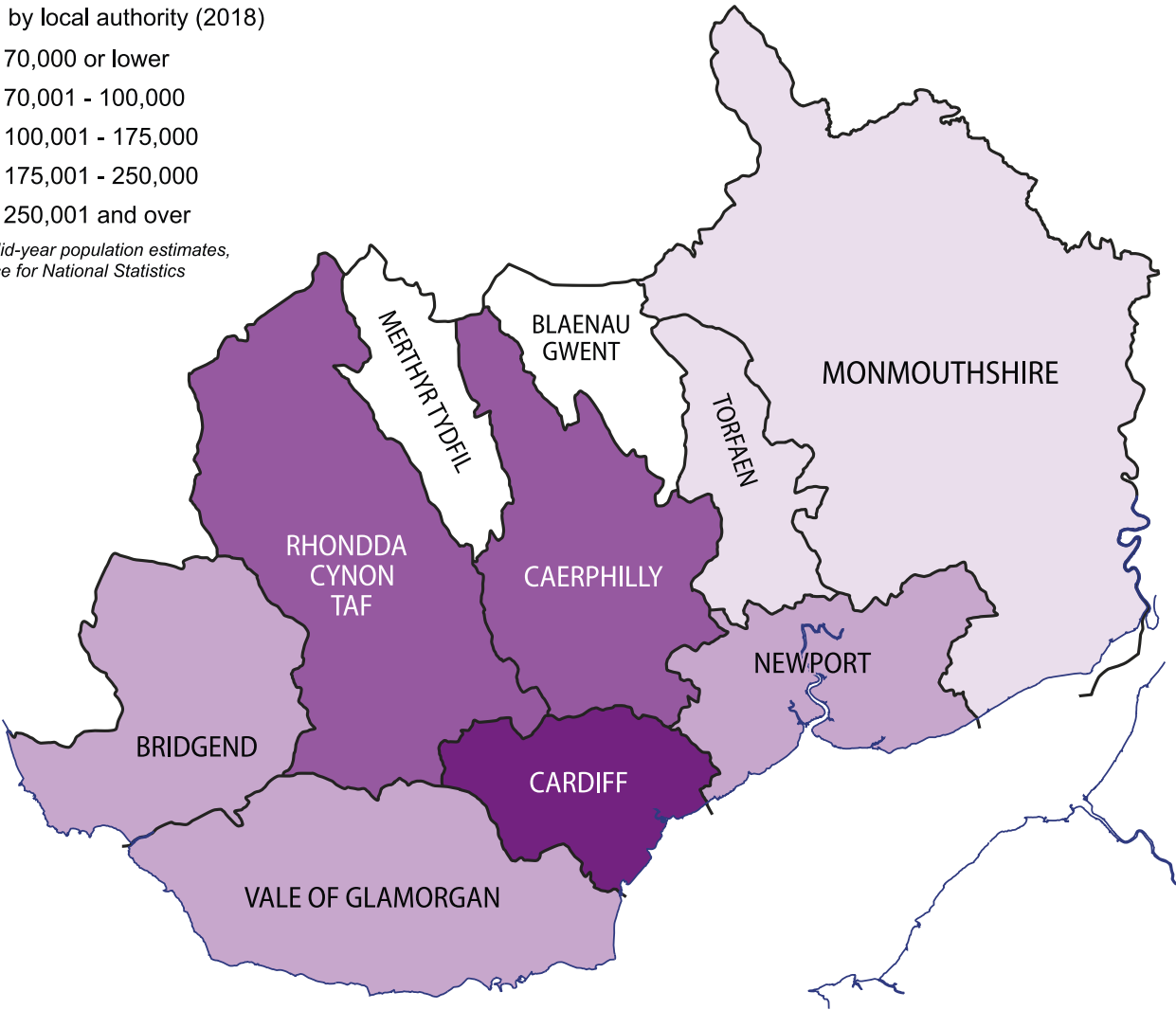
The Welsh Government is determined to see development and growth in Newport, allowing the city to fulfil its potential

as a second focal point for the region. Highly skilled employment opportunities in the transport and digital communications sectors 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.

Population, by local authority (2018)

- 70,000 or lower
- 70,001 - 100,000
- 100,001 - 175,000
- 175,001 - 250,000
- 250,001 and over

Source: Mid-year population estimates,  
Office for National Statistics





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

Flooding from rivers and the sea is a major issue across the region. Cardiff and Newport are estuarine cities while major rivers flow through all the south Wales Valleys, meaning many communities are at risk of flooding. Large parts of the region's key rail and road infrastructure are on valley floors or coastal locations and reliant on effective flood risk management to remain operational at all times. Places in the region benefit from strong coastal defences, including the Cardiff Bay Barrage and the Gwent levels sea wall, but sea levels are expected to rise more on the south coast than any other part of Wales over the next thirty years. The potential for flooding in the National Growth Area has implications for the delivery of growth in the region. Policy 8 sets out the national strategic approach to flood risk management and will ensure growth aspirations in National Growth Areas are co-ordinated with strategic decisions on managing flood risk.

The Valleys area, covering large parts of Bridgend, 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 has one of the most distinctive urban settlement patterns in the UK; it has seen significant investment in the A465, benefitted from EU funding programmes and in the future it will be better connected as a result of 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 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.

Cardiff, Newport and the Valleys are identified in policy 1 as a National Growth Area where development will be directed. This will be supported by policies 2, 3, 6 and 8 which will ensure that development is sustainably located with easy access to public transport and other public services. Towns and cities must grow in a sustainable way and in a way which promotes placemaking. They should consider the needs of all residents, including older people and people with disabilities, and ensure that specialist housing provision is considered and planned for. Public sector land will be used effectively to demonstrate exemplar forms of development and placemaking.

The rural areas of the South East, whilst lying in relatively close proximity to major towns and cities, will be supported by policies 4 and 5 in order for these communities to be sustained for the long term. Digital and mobile connectivity will be crucial to the economic success of the South East and policies 13 and 14 help to ensure that suitable infrastructure is in place to support this.

Policy 7 sets out the national strategic approach to delivering affordable housing and ensures the focus of funding and housing policies is on driving increased provision. Planning and co-ordinating the delivery of new housing to meet identified needs is an important task for the regional planning process. Under the Welsh Government central estimates 66,400 additional homes are needed in the region until 2039 and over the initial five years (2019-20 to 2023-24) 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. Understanding and managing different development pressures across the region will be a key issue for Strategic Development Plans. Strategic housing issues must be considered at the regional level and not on the basis of the aspirations of individual local planning authorities.

The Welsh Government wishes to see biodiversity enhanced and ecosystems become more resilient across the South East. Policies 9 and 15 set out the national strategic approach and will ensure that action to address the climate emergency, to reverse biodiversity decline and to ensure the well-being of communities takes place. These policies require consideration be given to the type of action necessary at regional and local levels and how this can be facilitated through Strategic and Local Development Plans.

Investment in creating resilient ecological networks and green infrastructure will bring multiple benefits for communities and businesses as well as nature itself. Action to improve resilience is required in all areas. The emphasis in this region will be on the relationship between policies 9 and 15 and policies 2 and 6 which will shape urban growth, and policies 11 and 12 which focus on connectivity. The pattern of settlements and the nature of the ecological networks which already exist, the pressures they and land is being subjected to and the opportunities which exist to create greater resilience will be factors in determining specific approaches. Where there are conflicting priorities these will need to be considered and resolved regionally and locally.

The universities in Cardiff, Newport and Pontypridd are an important presence in the region, providing further education, undertaking research and supporting innovation, providing employment, attracting students and supporting the local businesses and communities around them. Strategic and Local Development Plans should consider their role in the region and how they can play a bigger role in supporting the regional economy, innovation and their communities.

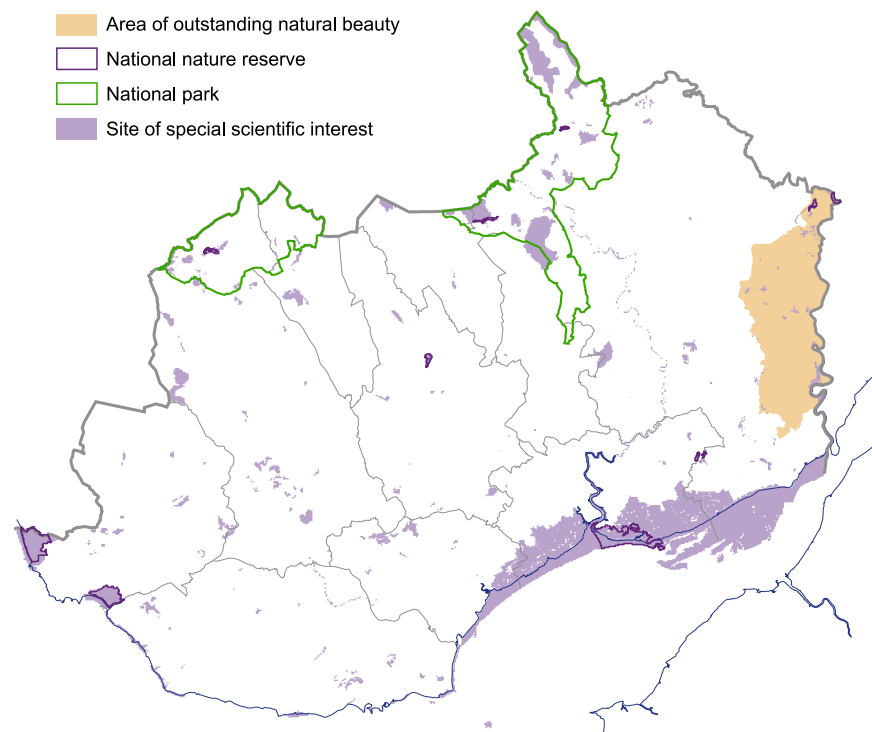
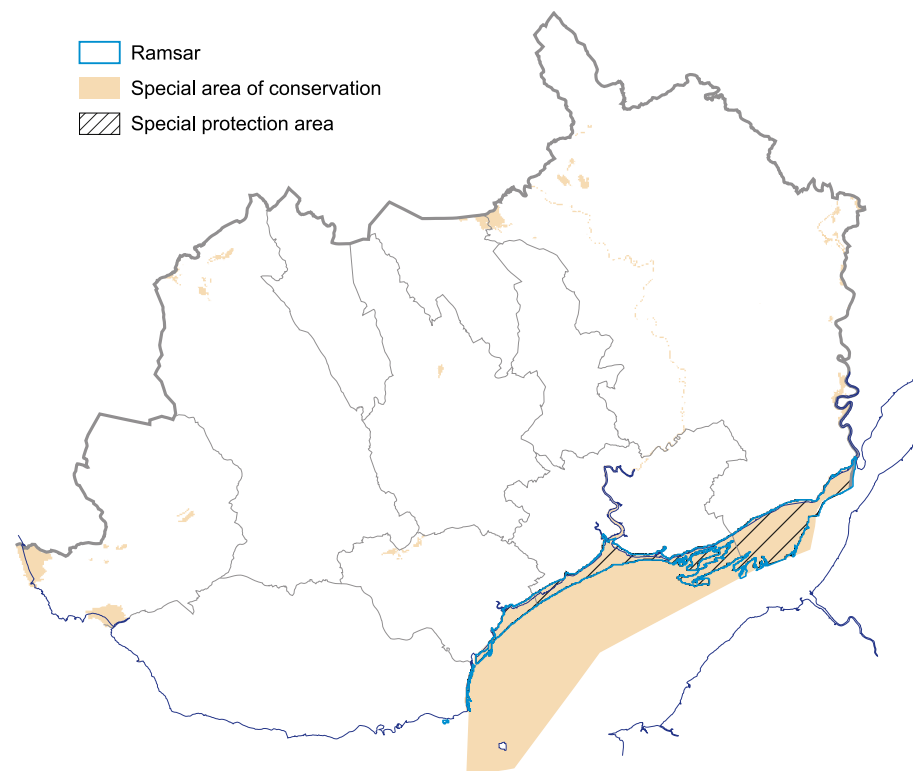
The South East region accounts for 51% of the total economic output of the Welsh economy. The Regional Economic Framework to be prepared by the Welsh Government in partnership with local authorities, communities, business and key stakeholders, will set

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 Cardiff Capital Region City Deal has made progress in developing and strengthening a regional approach. The Strategic Development Plan should be informed by the Cardiff Capital Region City Deal and 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.

The Strategic Development Plan should also consider how traditional and new economic sectors can be supported and be open to exploring the role of both existing and new types of employment areas. It should also recognise opportunities for the development of economic clusters, where businesses choose to locate in close proximity for mutual benefit, and whether there is a need for further infrastructure investment to support this.

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.

## Designated Natural Environment in the South East





Prosperity is not uniform across the region. 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.

The Welsh Government strongly supports the development of the foundational economy in the region. The foundational economy represents those parts of the economy which are integral to the well-being of places, communities and people and which deliver people's everyday needs. The Welsh Government will continue to support greater resilience for local and regional economies and support business growth and new employment opportunities. Strategic and Local Development Plans should identify the role of the foundational economy, consider how the land-use planning system can support it and develop appropriate policies. Areas of the foundational economy which the planning system can support include regeneration initiatives, health and social care, social housing, tourism and steps to encourage greater community benefits from new development.

In urban areas, including the National Growth Area of Cardiff, Newport and the Valleys, the enhancement (net-benefit) of biodiversity and the provision of green infrastructure must both shape growth strategies and be fully integrated as part of location and design solutions for proposed development.

Based on the indicative map that supports policy 9, upland areas in the southern and northern ridges of the valleys appear to broadly contain the most resilient ecological networks, but this does not mean they are as resilient as they ought to be.





The valleys themselves and the areas along the south coast and in the east of the region tend to be less resilient in terms of ecological networks, reflecting the forms of agricultural and development pressures faced. The challenge is to identify ways to achieve integrated and innovative nature-based solutions which will cumulatively improve ecological resilience and green infrastructure across the region.

Policy 9 requires that existing networks be improved and expanded upon. Equally, opportunities must be identified to safeguard and create resilient networks, and the ecosystem services on which they depend, and the multiple benefits derived from green infrastructure where currently this is not the case. This includes considering the role of protected landscapes and nature conservation designations. As well as in the most urban areas and the valleys, policies 9 and 15 work alongside policies 4 and 5 to require that the relationships between all forms of land use and management should be considered more fully in the rural parts of the South East region if we are to address the climate emergency, reverse biodiversity decline and enable communities to benefit from more sustainable forms of managing natural resources.

It is vital the region plays its role in decarbonisation and supports the realisation of renewable energy. Policies 17 and 18 set out Future Wales' approach to renewable energy generation across Wales. There is strong potential for wind, marine and solar energy generation and Strategic and Local Development Plans should provide a framework for generation and associated infrastructure. The Welsh Government wishes to see energy generation, storage and management play a role in supporting the South East economy. Local ownership and distribution is important for ensuring communities in proximity to renewable energy development benefit from it and that our future energy system better serves Wales.



## Managing Growth



### Policy 34 – Green Belts in the South East



The Welsh Government requires the Strategic Development Plan to identify a green belt to the north of Cardiff, Newport and the eastern part of the region to manage urban form and growth.

The Strategic Development Plan must consider the relationship of the green belts with the green belt in the West of England. Local Development Plans and development management decisions should not permit major development in the areas shown for consideration for green belts, except in very exceptional circumstances, until the need for green belts and their boundaries has been established by an adopted Strategic Development Plan.

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The close relationship between the South East and the West of England and the presence of a large green belt around Bristol means that long-term development pressures will in part be directed from England to the South East region. The proximity to a large populous English region provides opportunities that can support the South East, but these opportunities must be managed strategically and on a regional basis.

Strategic decisions on the location of development, 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, support actions to address inequality and deprivation and improve links to neighbouring areas of England. Planning Policy Wales sets the policy context for establishing green belts. In advance of a Strategic Development Plan, the areas shown for consideration for green belts should be treated as if they have been designated as green belts by a Strategic Development Plan. Planning Policy Wales sets out the circumstances and limited forms of development that may be appropriate in green belts and this should be applied to the areas identified for consideration for green belts.



## Supporting Growth



### Policy 35 – Valleys Regional Park



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 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 the planning system supports its delivery.

The South East has many outstanding historic and natural resources which are an important part of the local fabric and help to tell the story of its distinctive and unique communities. Outstanding places include its Blue Flag Award beaches along the southern coast, Blaenavon Industrial Landscape World Heritage Site and Scheduled Monuments such as the Caerleon Roman Fortress and Baths and numerous castles located across the region. They should be protected for the enjoyment of future generations and help to provide economic benefits for the region’s communities. The region’s distinctive heritage should be preserved and enhanced by high quality 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. Strategic and Local Development plans should consider the role of the ports locally, regionally and nationally and establish frameworks to support their operation and potential expansion.

The region’s concentration of population and its historic and future growth 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. The region is heavily dependent upon marine aggregates from the Bristol Channel and the Severn Estuary and minerals from this area serve both Welsh and English markets.



## Policy 36 – South East Metro



The Welsh Government supports the development of the South East Metro and will work with Transport for Wales, local authorities and other partners to enable its delivery and maximise associated opportunities.

Strategic and Local Development Plans must support the South East Metro. Planning authorities should plan growth and regeneration to maximise the opportunities arising from better regional connectivity, including identifying opportunities for higher density, mixed-use and car-free development around new and improved metro stations.

Across Wales and the regions, the Welsh Government wishes to see development built in sustainable locations that are supported by the active travel and public transport infrastructure and services needed to enable people to live active and healthy lives. This includes ensuring average levels of air and noise pollution are reduced or at least minimised. The overall aim is to reduce the need to travel, particularly by private vehicles, and support a modal shift to walking, cycling and public transport. Policies 11 and 12 set out the strategic approach to national and regional connectivity and how the Welsh Government will support and invest in improvements to active travel and public transport.

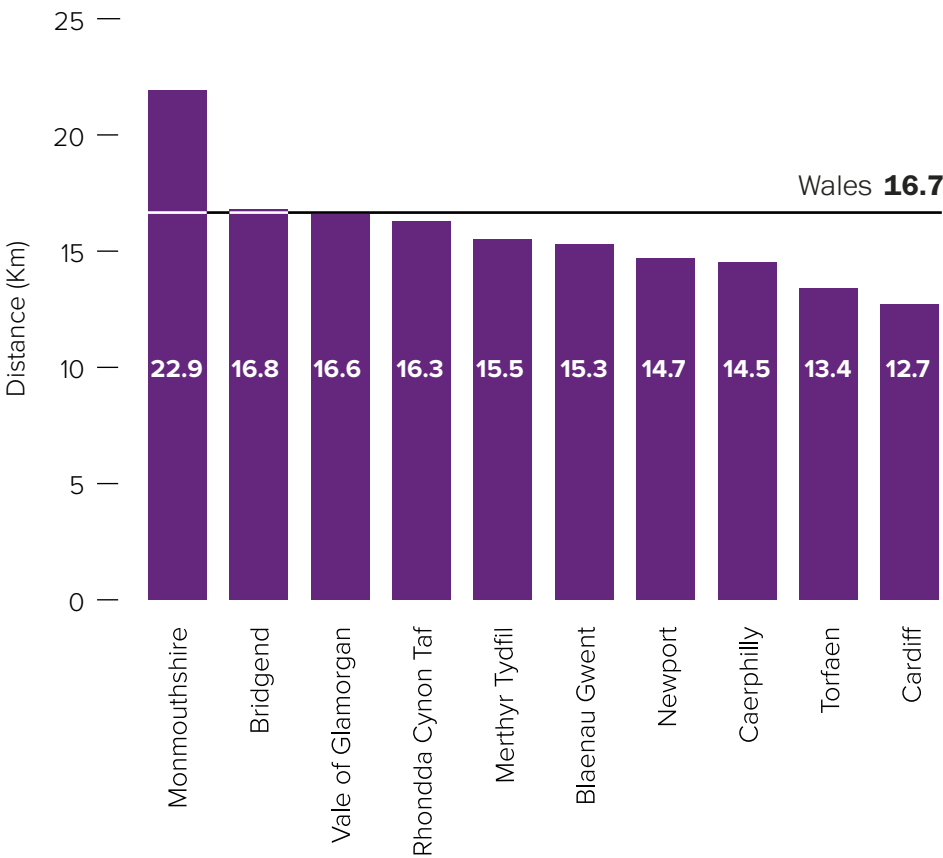
The South East Wales Transport Commission's advice on how to tackle congestion on the M4 supports this policy's focus on planning development around the public transport network, not the motorway.

In the South East region, the rail infrastructure and services are fundamental to an effective and efficient transport network and central to improving regional and national connectivity. The South East 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. The high population concentration combined with a dense rail network in the South East means the region is well-suited to transit orientated development, as promoted by policy 12. The quality, variety and frequency of transport services will vary across the region and should be taken into account by planning authorities in the preparation of the regional spatial strategy. In accordance with policy 19, Strategic and Local 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.

Facilitating access to the Metro by active travel will make an important contribution to modal shift from car to public transport journeys at a regional level. Achieving this will require high quality active travel routes linking neighbourhoods and trip destinations with metro stations. The provision of high quality, secure cycle parking at interchanges will also be essential. Expanding the on-street cycle hire system developed in Cardiff across the wider region could also help grow public transport patronage. Integrating the Metro with the South Wales mainline railway at key locations can also help reduce traffic volumes on the M4, including commuters to and from the South East to places such as Swansea Bay and Bristol.

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 East 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.

Average distance travelled to work (Km) by workers aged 16–74 in 2011, by local authority of residence





## The relationship between the Future Wales' 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 and climate-resilient	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•

## OUTCOMES


















A Wales where people live...












	P20	P21	P22	P23	P24	P25	P26	P27	P28	P29	P30	P31	P32	P33	P34	P35	P36
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 and climate-resilient	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•



















## Connections between Future Wales policies and Planning Policy Wales

Future Wales Policy		Planning Policy Wales Cross-Reference	
1	Where Wales will grow	1.23 – 1.24 3.41 – 3.48	   
2	Shaping Urban Growth and Regeneration – Strategic Placemaking	3.41 – 3.48	   
3	Supporting Urban Growth and Regeneration – Public Sector Leadership	3.41 – 3.48	   
4	Supporting Rural Communities	3.38 – 3.40 5.6	   
5	Supporting the rural economy	5.6	 
6	Town Centre First	4.3	   
7	Delivering Affordable Homes	4.2 4.2.25 – 4.2.34	 
8	Flooding	6.5 6.6	 
9	Resilient Ecological Networks and Green Infrastructure	6.2 6.4	   
10	International Connectivity	4.1 5.3	  

Future Wales Policy		Planning Policy Wales Cross-Reference	
11	National Connectivity	4.1 5.3	
12	Regional Connectivity	4.1 5.3	
13	Supporting Digital Communications	5.2	
14	Planning in Mobile Action Zones	5.2	
15	National Forest	6.4 6.4.24 – 6.4.26	
16	Heat Networks	5.4.18 5.9 5.9.12 – 5.9.13	
17	Renewable and Low Carbon Energy and Associated Infrastructure	5.9 6.3.8	
18	Renewable and Low Carbon Energy Developments of National Significance	5.9 6.3.8	
19	Strategic Policies for Regional Planning	1.25	
20	National Growth Area – Wrexham and Deeside	3.41 – 3.48	
21	Regional Growth Area – North Wales Coastal Settlements	3.41 – 3.48	

Future Wales Policy		Planning Policy Wales Cross-Reference	
22	Green Belts in the North	3.64 – 3.78	
23	North Wales Metro	4.1 5.3	
24	North West Wales and Energy	5.7 6.3.10	
25	Regional Growth Areas – Mid Wales	3.41 – 3.48	
26	Growing the Mid Wales Economy	3.38 – 3.40 5.4 5.5 5.6	
27	Movement in Mid Wales	4.1 5.3	
28	National Growth Area – Swansea Bay and Llanelli	3.41 – 3.48	
29	Regional Growth Areas – Carmarthen and the Haven Towns	3.41 – 3.48	
30	Green Belts in the South West	3.64 – 3.78	
31	South West Metro	4.1 5.3	



Future Wales Policy		Planning Policy Wales Cross-Reference	
32	Haven Waterway and Energy	5.7 6.3.10	
33	National Growth Area – Cardiff, Newport and the Valleys	3.41 – 3.48	
34	Green Belts in the South East	3.64 – 3.78	
35	Valleys Regional Park	3.20 3.46 3.56 5.5.1	
36	South East Metro	4.1 5.3	