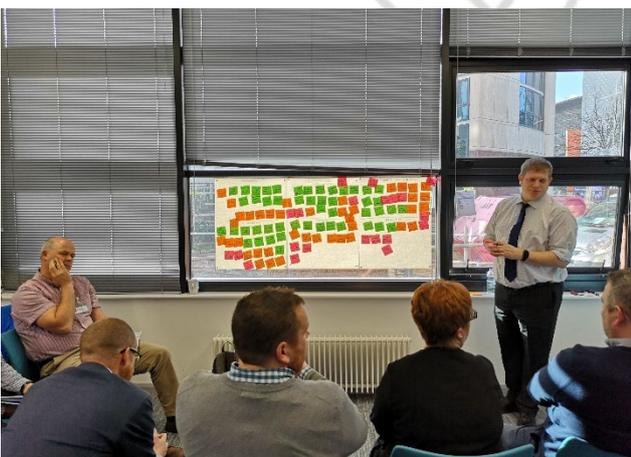


5. Regional Workshop Report – South East Wales

Cardiff, 7 December 2018

January 2019



Llywodraeth Cymru
Welsh Government

ARUP

Contents

	Page
1 Introduction	1
1.1 Study Context	1
1.2 Stakeholder Involvement	2
1.3 Purpose	2
1.4 Structure	3
2 Arrangements and Attendees	4
2.1 Details	4
2.2 Welsh Language	4
2.3 Agenda	4
2.4 Presentation	5
2.5 Activities	5
2.6 Participants	6
3 Results of Activity 1 – ‘sticky-dot’ exercise	8
3.1 Defining policy areas at different spatial scales	8
3.2 Prioritising cross border issues	10
3.3 Defining major employment sites	11
3.4 Defining major centres of retail and commercial activity	11
3.5 Summary	12
4 Results of Activity 2 – SWOT	13
4.1 Social and Cultural	13
4.2 Economic	15
4.3 Environmental	18
4.4 Summary	21

Figures

Figure 1 NDF Regions

Appendices

Appendix A

South East Wales Region - Workshop Presentation

Appendix B

Sticky Dot Activity Outputs

Appendix C

SWOT Activity Photos

Appendix D

South East Wales Event Register

1 Introduction

1.1 Study Context

Following the consultation on the National Development Framework (NDF) Preferred Option in the summer of 2018, the Welsh Government are now in the process of developing the Draft NDF with consultation planned for July 2019.

As set out in the Preferred Option, it is proposed the NDF will include both national and regional policies across the defined regions. The three regions will cover North, Mid and South West and South East Wales as shown in Figure 1.

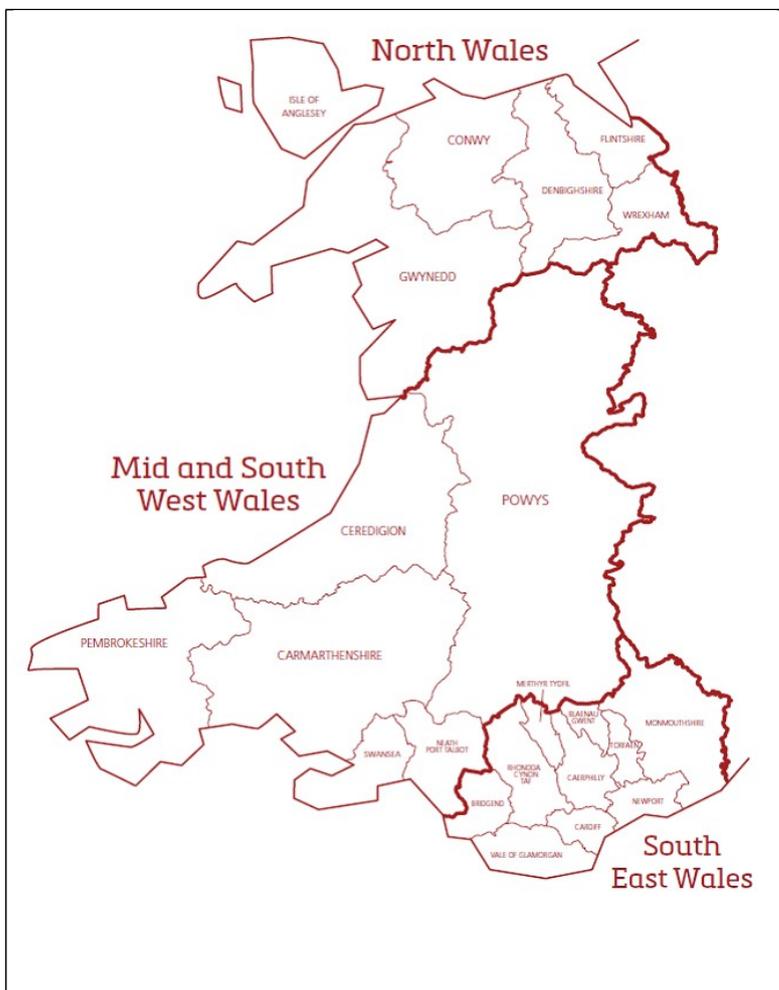


Figure 1 NDF Regions

This reflects the regions identified by the Welsh Government's Economic Action Plan. Chief Regional Officers have been appointed for each region and have commenced work to develop the Welsh Government's approach to improving regional working and delivery. The Planning (Wales) Act 2015 facilitates this approach and provides a legal framework for the preparation of Strategic Development Plans (SDPs) on a regional basis.

From a regional perspective the NDF's role includes supporting the delivery of the Welsh Government's regional policies and better strategic planning / collaboration between Wales' Local Planning Authorities (LPAs).

To assist in the development of the NDF and provide an evidence base for the policy development (both national and regional), Arup have recently been appointed to undertake research in this area.

The research will establish an evidence base of the strengths, weaknesses, opportunities and threats (SWOT) within each region and explore the role of the NDF in responding to these, suggesting the most appropriate policy intervention (e.g. national, regional, local or community planning). The research will draw together a range of data and information for each of the three regions, presenting this in both tabular form and spatially. Importantly, as well as supporting the development of the Draft NDF, the outcomes of this research will be used to support the development of SDPs and LDPs.

1.2 Stakeholder Involvement

As part of the study, Arup has led two approaches to stakeholder involvement:

1. As part of the data / information gathering, Local Planning Authorities in Wales have been contacted to request quantitative information they hold to inform the research. This includes, for example local employment, housing and environmental data where it has not been possible to gather this data from published sources; and
2. As part of the SWOT process and in seeking to identify regional priorities, 148 organisations were invited to attend a series of workshop events, representing those interested in the economy, society, culture and environment in Wales. The workshops focused on exploring a range of policy areas and issues, as well as discussions about the strengths, weaknesses, opportunities and threats (SWOT) within each region. The focus was on asking stakeholder groups what the NDF could do to maximise its contribution to the future successes of the Welsh regions.

1.3 Purpose

The data / information gathered as part of the study will be presented within the Study Report. This Workshop Report provides the results of the Mid and West Wales Regional event and provides a factual account of the event, its discussions and initial findings.

Separate Workshop Reports have been prepared for the North Wales and Mid & South West Wales regional events.

A SWOT analysis is provided within the full Study Report.

1.4 Structure

This Workshop Report is presented in the following sections:

- Section 2 describes the details of the workshops and those involved;
- Section 3 provides the results of the first stakeholder activity, helping consider different policy areas, cross border issues, how they should be defined and at what scale; and
- Section 4 provides the results of the second stakeholder activity, involving focused discussions about the region's social, cultural, economic and environmental strengths, weaknesses, opportunities and threats.

2 Arrangements and Attendees

2.1 Details

A range of locations, venues, dates and times were explored and those decided upon best reflect the limitations and requirements of the study, considering capacity, accessibility and programme. The South East Wales event was arranged as follows:

Location	Cardiff
Venue	Arup
Date	7 th December 2018
Time	10.00 – 12.30

2.2 Welsh Language

All event materials were supplied in both Welsh and English languages and attendees were invited to participate in the language of their choice.

To facilitate this, Arup were supported by Trosol who provided written translation services.

During group activities at the workshops, any person that wished to communicate in Welsh was able to thanks to a simultaneous translation service, also provided by Trosol.

2.3 Agenda

The structure of the workshop was focused around the following items:

Item	Description
Introductions	The project team was introduced, and stakeholders were asked to identify their name and organisation in turn, to help the participants appreciate the diversity and range on interests involved. Housekeeping was also outlined.
The Study	The Welsh Government set the context for the study, providing the background to the NDF, its consultation, the scope of the Arup research, approach to the NDF Regions and programme.
Data and trends	Arup explained the types of economic, social and cultural and environmental information, characteristics and spatial maps that have been sought and inform the study. Useful trends to show comparisons across the Welsh regions set the context of the study area in advance of the stakeholder activities.

Item	Description
Data definitions and issues	Activity 1 – ‘Sticky-dot’ exercise – helped stakeholders share their views of the relevant scales and definitions of policy areas, as important considerations for the development of the NDF.
SWOT	Activity 2 – Strengths, Weaknesses, Opportunities and Threats exercise – facilitated discussions around economic, social, cultural and environmental issues pertinent to the region.
Next steps	Arup and the Welsh Government closed the event by thanking participants for their involvement, explaining how they could stay involved and the next steps for the study and NDF. This included that there would be a shared factual Workshop Report, future focused stakeholder meetings about projects and plans, data collection for publication via the Lle Portal, a Study Report and timeline for the publication of the NDF.

2.4 Presentation

A PowerPoint presentation complemented the above agenda items, providing prompts and helpful text and images. A copy is included at Appendix A.

2.5 Activities

Stakeholders were asked to participate in two activities as part of the workshop, which are described in turn below.

2.5.1 Activity 1 – ‘Sticky-dot exercise’

In order to establish the policy areas and issues of most interest within the region and whether or not the NDF is the appropriate mechanism to help address these, an interactive session involved stakeholders being asked to help:

- Define the appropriate scale of policy intervention (e.g. National, Regional, Local or Community) across a range of themes;
- Prioritise cross border issues;
- Define major employment sites; and
- Define major centres of retail and commercial activity.

These activities involved participants being provided with an exact number of sticky dots to place on a series of activity sheets, to record their choices and preferences accordingly.

A copy of the completed activities is provided at Appendix B.

Further explanation alongside a summary of the results is provided in Chapter 3 of this report.

2.5.2 Activity 2 – SWOT

Attendees formed three groups who in turn discussed the region in relation to all of the following broad themes, which reflect the four pillars of sustainable development in Wales:

1. Social and Cultural;
2. Economic; and
3. Environmental.

The sessions were facilitated and scribed to help encourage discussion and record the issues as they were raised.

Each group spent between 20 and 30 minutes discussing each of the themes.

Photographs of the exercise and records of the outputs are provided at Appendix C, with a summary of the discussions provided in Chapter 4 of this report.

2.6 Participants

2.6.1 Attendees

27 participants attended the workshop, representing the following organisations:

- Age Cymru
- Associated British Ports
- Bridgend County Borough Council
- Caerphilly County Borough Council
- Cardiff City Council
- Cardiff University
- Community Housing Cymru
- Home Builders Federation
- Institute of Civil Engineers
- Linc Cymru
- Merthyr Tydfil County Borough Council
- Monmouthshire Housing
- Natural Resources Wales
- Newport City Council
- Rhondda Cynon Taff County Borough Council
- Renewables UK Cymru
- Swansea Council
- Sustrans
- Torfaen County Borough Council
- Transport for Wales
- Vale of Glamorgan Council
- Wales & West Housing
- Welsh Water
- Western Power Distribution
- Wildlife Trust

A copy of the event register is included at Appendix D.

Those invited but unable to attend included:

- Blaenau Gwent County Borough Council
- BT Cymru
- Cardiff Capital Region
- Cardiff Metropolitan University
- Confederation of Passenger Transport
- Cardiff PSB
- Cardiff & Vale University Health Board
- Confederation of British Industry
- National Grid
- Royal Institute of Chartered Surveyors
- South Wales Fire & Rescue Service
- South Wales Trunk Road Agency
- University of South Wales
- Visit Wales
- Welsh Local Government Association.

3 Results of Activity 1 – ‘sticky-dot’ exercise

All outputs of this activity can be found in Appendix B, whilst a summary is provided below.

3.1 Defining policy areas at different spatial scales

Participants were asked to place their sticky dot within a column or on a dividing line to best represent their choice as to which spatial scales (level) different policy areas should be defined.

The results, as shown in full at Appendix B, show variation across the different spatial scales but with clusters helping to illustrate some consensus in places. For the purposes of this report, a green marker has been overlaid by Arup on a blank copy of the activity sheet to best represent and illustrate the clusters. This seeks to help inform the Welsh Government at which scale the attendees generally considered each policy area should be defined. This is shown below:

Policy area	National	Regional	Local Authority	Community	None (non-planning issue or best handled elsewhere)
A settlement hierarchy			■		
Population growth (forecasts)		■			
Strategic health and well-being issues		■			
Strategic Welsh language issues		■			■
Affordable Housing need			■		
Housing allocations (units)			■		
Strategic natural resources / environmental assets		■			
Strategic marine planning issues	■				
Key economic sectors			■		
Strategic employment sites		■			
Strategic transport objectives or targets		■			

Policy area	National	Regional	Local Authority	Community	None (non-planning issue or best handled elsewhere)
Strategic active transport objectives or targets		■			
Strategic placemaking principles		■			
Strategic design advice/requirements		■			
Strategic built heritage assets			■		
Strategic flooding issues		■			
Strategic minerals issues		■			
Strategic waste issues			■		
Strategic energy project		■			
Strategic digital connectivity issues		■			

In summary, the majority of participants felt that the policy areas identified should predominantly be dealt with at a regional or national level.

The results indicate that in South East Wales there is a general consensus that policy areas that should be considered at a **national level** include:

- a) Strategic marine planning issues
- b) Strategic digital connectivity issues
- c) Strategic energy projects

At the **national to regional** level:

- a) Population growth (forecasts)
- b) Strategic health and well-being issues
- c) Strategic Welsh language issues
- d) Strategic natural resources / environmental assets
- e) Strategic transport objectives or targets
- f) Strategic flooding issues
- g) Strategic minerals issues
- h) Strategic design/advice requirements

At the **regional** level:

- a) Key economic sectors
- b) Strategic employment sites
- c) Strategic built heritage assets
- d) Strategic waste sites

And at the **local to regional** level:

- a) A settlement hierarchy
- b) Affordable housing need
- c) Housing allocations

3.2 Prioritising cross border issues

Participants were asked to place their sticky dot within a row to best represent their choice as to which different economic, social, cultural and environmental issues are of most importance as a cross-border issue for their region. Participants were able to choose their preferred three from seven options.

The results, as shown in full at Appendix B, show all the different options were selected at least once but with evident consensus that some types of cross border issues are considered to be more important than others for the participants.

For the purposes of this report, a total count has been provided to illustrate the choices. This seeks to help inform the Welsh Government which cross-border policy issues are of most importance in the region. This is shown below:

Linkage	Number of times selected
Energy infrastructure	17
Employment / place of work	13
Housing and communities	6
Labour / employees / skills	15
Retail / commercial and leisure	4
Services and facilities	2
Transport and travel	26

3.3 Defining major employment sites

Participants were asked to place their sticky dot on an area of a worksheet to best represent their choice as to which size/scale employment sites are considered to be ‘major’ in their region.

The results, as shown in full at Appendix B, show all the participants considered a ‘major’ employment site in South East Wales to be greater than 20 hectares.

For the purposes of this report, a total count has been provided to illustrate the choices. This seeks to help inform the Welsh Government how the NDF could best help shape major (or strategic) employment sites across the regions. This is shown below:

Scale of Employment Site	Number of times selected
50+ hectares	15
Between 20 and 50 hectares	2
20 hectares	8
Between 10 and 20 hectares	2
10 hectares	0
Less than 10 hectares	0

We recognise that scale is only one way in which to define major sites and other factors could be considered. This definition is discussed in more broadly in the Study Report.

3.4 Defining major centres of retail and commercial activity

Participants were asked to place their sticky dot beneath an area of a worksheet to best represent their choice as to which scale centres of retail and commercial activity are considered to be ‘major’ in their region. This was complemented by three maps:

1. Map A: showing centres where there are 3,000 or more employed in the retail / commercial sector;
2. Map B: 2,000 or more; and
3. Map C: 1,000 or more.

The maps and the results, as shown in full at Appendix B, show the participants selected all of the options, but with variations focused on maps A and B.

For the purposes of this report, a total count has been provided to illustrate the choices as selected. This seeks to help inform the Welsh Government how the NDF could best help shape major (or strategic) centres of retail and commercial activity across the regions.

It should also be noted that 6 no. participants did not select any of the options, instead electing to place their sticky dot outside of the area. These responses are also indicated in the table below against 'none of the above'.

	Number of times selected
Over 3,000 Employees	13
Over 2,000 Employees	9
Over 1,000 Employees	1
None of the above	6

3.5 Summary

The results show a general consensus in South East Wales that:

1. The majority of strategic policy areas should be defined at the national to regional level apart from a settlement hierarchy, housing allocations and affordable housing need which should be defined at the local to regional level.
2. The key cross border issue is transport and travel with energy infrastructure and labour/employees/skills also being considered as issues of high importance.
3. A major employment site in South East Wales is greater than 20 hectares with the majority of participants stating that they should be over 50+ hectares.
4. A major centre of retail and commercial activity in South East Wales is one that accommodates more than 3,000 jobs.

4 Results of Activity 2 – SWOT

Participants were encouraged to consider Strengths/Weaknesses as ‘Current’ and Opportunities/Threats as ‘Future’.

SWOT discussions were facilitated, and notes were taken to help capture all of the points raised and shared. These are presented in the sections below.

The analysis of the SWOT is provided in the separate Study Report.

Photographs of the outputs and discussions are provided in Appendix C.

Section 4.4 provides a summary and regional overview.

4.1 Social and Cultural

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Community spirit/identity • Ethnic diversity in urban areas • Cultural heritage • The environment • Transport planning • Cultural identity nationally and regionally 	<ul style="list-style-type: none"> • Transport problems impacting on poorest members of society • Housing delivery • Ability to be able to deliver on housing obligations • Areas of deprivation/inequality • Rural isolation and service delivery • Sectoral approach to planning • Development driven by market forces – particularly for main services. • Lack of joined up working between housing and health • Uneven distribution of digital connectivity • Difficulty changing behaviours in regard to sustainable travel • Education facilities: depopulation in certain areas due to lack of good education provision • Welsh language – sometimes a source of regional and local tensions • Outward commuting impact local communities • Lack of joined up transport planning

STRENGTHS	WEAKNESSES
	<ul style="list-style-type: none"> ● Lack of innovation and variation in design of development, particularly housing ● Large housing developments being built without sustainable transport ● Lack of holistic approach to placemaking ● Uncertainty regarding the future of employment ● Higher unemployment levels

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ● Home working ● Strong national level placemaking policy. 	<ul style="list-style-type: none"> ● Uncertainty regarding the future of work ● Higher unemployment levels ● Climate change ● Flooding ● Future skills requirements not being met ● Housing aging communities ● Social care ● Welsh Government funding models

Planning Levers and Barriers were also discussed, with the following issues raised:

Levers:

- Public transport being put in place prior to development
- Economies of scale in terms of affordable housing delivery
- Active involvement of communities in the planning process
- Further consideration of the Well-being of Future Generations Act in planning decision making
- More awareness of planning for the elderly particularly in terms of access to services and overreliance on private car journeys.

Barriers:

- The inherent limits to the planning system in being able to solve every issue
- More clarity needed on how development is being delivered and how planning obligations are going to be met

Priorities for the NDF were discussed and the following key points emerged:

- Planning for an aging population particularly housing
- More support for Local Planning Authorities
- Attracting business into rural areas
- A new cross-sectoral approach to planning and development
- Engagement with the Well-being of Future Generations Act
- Planning for sustainable transport
- Embedded community identity and feeling
- Alignment between planning policy, decision-making and the City Deal vision
- Joined up working between Planning Authorities and Local Health Boards
- NDF shaping growth within the region
- The NDF should address the cultural aspects of placemaking
- Moving beyond the status-quo and having the courage to do things differently
- The need for appropriate funding the NDF
- Addressing housing deprivation in the Heads of the Valleys
- A strategic overview of Traveller transit sites
- A more holistic approach to development
- Targets and numbers not impacting the quality of development.

4.2 Economic

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • The environment • The number of viable sites along the M4 corridor • Economic diversity • Strategic industrial land • Ports- Cardiff and Newport • Transport network • South Wales Metro plans • Retail • Biosciences • Professional services • Aerospace • Cardiff Airport 	<ul style="list-style-type: none"> • Limited large industrial sites – most are fragmented or small scale • The proximity of industrial sites to existing port infrastructure and surface connectivity • Grid distribution and capacity • Cost and time of transporting goods • Energy investment being solely market driven • Brain drain and shortage of technical skills in key industries • Parochialism within communities • Congestion on the M4 – at Cardiff and Bristol

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Cross Border links – housing and employment • Education facilities – Universities and Colleges • Semi-conductors • Sports and Entertainment • Agriculture 	<ul style="list-style-type: none"> • Train Connectivity • Digital connectivity on trains e.g. wifi • Severn Rail Tunnel – limited size and engineering problems • Land holding by LPAs • Interplay between politics and regeneration, particularly in the Valleys • Online retail • Lack of investment in deprived areas • Not creating sustainable communities • Low wage employment

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Attracting young people to the area • Lower land values than across the border (West of England) • Removing of the Severn Bridge tolls • Brexit – opportunity to approach things differently • Targeting investment to deprived areas • City Deal • Port Expansion • Smaller scale live/work development • More residential development – could be an opportunity to reinvent town centres • Digital clusters • Renewable energy • M4 second crossing • Foundational economy – creating opportunities to encourage local spending • Aging population – larger working age population • Tourism – can do more to capture the full scale of the opportunity • Distribution and service transition 	<ul style="list-style-type: none"> • Metro • Congestion on the M4 if the relief road is not constructed • Decarbonisation impact on grid infrastructure • Perpetuating car use • Reliance on public sector employment • Energy/Ofgem long term investment programme • Skills agenda • Flood risk • Brexit • Retail – viability and vibrancy of High Streets • Air Quality • Propping-up industry – reliance on public subsidies • Shrinking working age population • Retaining students in the local area after graduation • Dependency ratio

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Future technologies and new employment opportunities • Use of public land to facilitate affordable housing • National and Local Government support/focus on apprenticeships, particularly in digital technology • Demand for SME office space • Start-ups and entrepreneurialism • Metro 	

Planning Levers and Barriers were also discussed, with the following issues raised:

Levers:

- Cardiff Central Enterprise Zone
- Permitted Development Rights for Ports
- Linkage between the Planning System and the Well-being of Future Generations Act
- City Deal and access to funding
- Further use of CPOs – land assembly
- Market intervention
- More agile planning/flexible provision
- Taking stock post-Brexit
- Joined up planning between LDPs, SDPs and the NDF
- Funding for SMEs
- Review of Government land holdings
- Policies catered to SMEs
- Redress focus to allow for more bottom-up approaches to creating sustainable communities
- Well-being of Future Generations Act - a social and cultural commitment

Barriers:

- Poor access to Cardiff Airport
- TAN 8 (renewables) is not delivering what it set out to
- No national level economic debate
- Limited incomes

Priorities for the NDF were discussed and the following key points emerged:

- The need to expand grid capacity
- Considering and planning for future skills needs and opportunities
- Creating better connectivity – both physical and digital
- Supporting international connectivity – e.g. Cardiff Airport expansion
- New approaches to address the future of the Valleys
- Supporting a regional level of planning
- Planning for both growth and decline in light of regional disparities
- Consideration of security in the planning system – particularly for housing and employment development
- Taking into account the need for and approaches to funding e.g. pump priming vs. borrowing
- Support for middle tier developers

4.3 Environmental

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Diversity of resources • Health benefits associated with the environment • Number of designated sites in the region • Minerals policy – focused away from fossil fuels • Environmental resources attract people to the region • Proximity of natural resources to the population • Diversity of resources • Demand centres closer to generation 	<ul style="list-style-type: none"> • Restriction on bat storage • Air Quality • Disconnect between where waste arises and where it is dealt with • Planning for development not for the environment/life in general • Plans focused on new buildings/infrastructure but do not focus on improving existing • Delivery of nature-based solutions to problems • Lack of EV infrastructure • Energy efficiency of housing stock • Minerals – coal extraction vs. new policy • Waste policy is currently focused at an LPA level but should be more strategically planned • Energy storage • Linkage between built environment and social inclusion • Impact of M4 on Air Quality

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Benefits of centralisation e.g. proximity to port infrastructure, carbon intensity • Nature based solutions to issues • Strategic plans for water management/flood defences • Sustainable transport – localised travel • Green infrastructure policy linked to Well-being of Future Generation Act/Well-being goals • Technology • Enhancement through Development • Well-being of Future Generations Act • Looking beyond present in forms of green infrastructure • Creating resilience through investment in green infrastructure • SUDS • Contaminated land • Eco-system services • Carbon and development • Hybrid renewables projects • Renewables – solar vs. wind • EV • Intelligent grid • District heating • Tidal energy • Not imposing minimum standards for development e.g. roads, green space • Further consideration of the environmental benefit of transport schemes 	<ul style="list-style-type: none"> • Waste generation • Air quality impact of the M4 • Pressure on green spaces for development in urban areas • Maintenance of green infrastructure • Grid capacity/subsidy • Amount of planned development/development pressure • Getting the balance wrong • Cost/benefit of transport schemes being driven by economics not environment • Green space in new development and management • Grid management

Planning Levers and Barriers were also discussed, with the following issues raised (all levers):

- Planning linked to the Well-being of Future Generations Act and the Environment Act
- Planning should be a facilitator
- Importance of the Well-being of Future Generations Act and focusing across sectors
- Environmental and social resilience
- Viewing the environment as an asset
- Looking at the environment beyond just designations
- Finding the balance between the environment and development
- Need for a strong message around infrastructure
- Energy infrastructure – delivery at what scale?

Priorities for the NDF were discussed and the following key points emerged:

- The need for regional planning for the protection and enhancement of the strategic environment assets
- Identifying strategic heat (energy) sites across Wales
- The strategic management of waste
- Holistic thinking around development, not just relying on traditional approach
- Creating a Valleys regional park, utilising existing environmental assets.

4.4 Summary

4.4.1 Key points

Ten key points raised by stakeholders in the South East Wales region were:

1. Although there are positive plans in place to improve transport around the region (e.g. Metro/City Deal), connectivity in both the physical and digital sense remains a priority area.
2. Cross border links with England are important to the success of the region but this is threatened by road congestion (particularly along the M4) and current rail infrastructure.
3. There is need to both appreciate and plan wisely to reflect the economic diversity of the area and to address poverty and inequality.
4. Support for de-carbonisation particularly in terms of transport however this needs to be planned carefully due to the limitations of current grid infrastructure.
5. Strong education sector, but skills need to be retained in the area to prevent 'brain drain'.
6. Protecting the natural environment as a regional asset, whilst fully maximising its potential in terms of tourism and regeneration.
7. Concerns related to waste management and the current localised approach.
8. Concern regarding local retail and the loss of the traditional High Street which may lead to the need to diversify town centre uses.
9. International connectivity: a need to provide better access and opportunities around Ports and Cardiff Airport.
10. Strong support for entrepreneurialism and SMEs.

4.4.2 How the NDF could or should help the region

Stakeholders suggested that the NDF could or should help the region in the following ten ways:

1. Recognise the important of cross border linkages and connectivity.
2. Provide strategic regional environmental policies particularly in certain areas e.g. waste management, water management.
3. Support the decarbonisation agenda and strategic planning for grid infrastructure.
4. Facilitate opportunities to improve tourism in the area particularly in the Heads of the Valleys.
5. Address regional disparities and inequalities.
6. Encourage further investment to Ports and Cardiff Airport to improve international connectivity.
7. Support development which promotes environmental and social resilience and aligns with the Well-being of Future Generations Act.
8. Allow flexibility in terms of re-use of existing buildings, diversifying town centres and providing employment space catered to SMEs/live-work units.
9. Promote green infrastructure in development.
10. Encourage sustainable development which reflects employment and skills needs, helping to retain young people in the region.

These priorities and suggestions in relation to what the NDF could / should do will be explored in greater detail through the wider SWOT Reports which are to be prepared alongside this Workshop Summary Report.

Appendix A

South East Wales Region -
Workshop Presentation

NDF Regions Workshop

South East Wales / 7 December 2018



Llywodraeth Cymru
Welsh Government

ARUP

Agenda

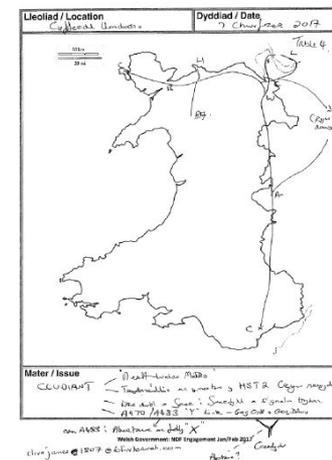
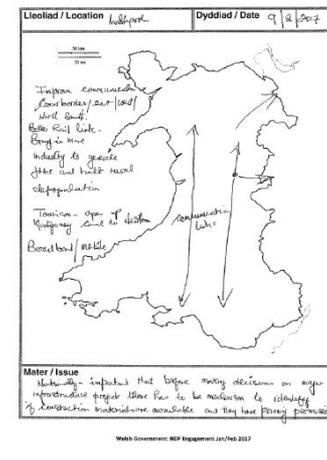
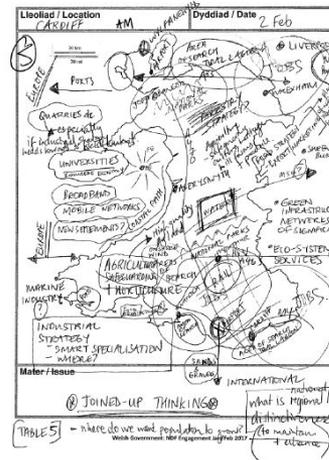


1. Introductions
2. The Study
3. Data and trends
4. Data definitions and issues

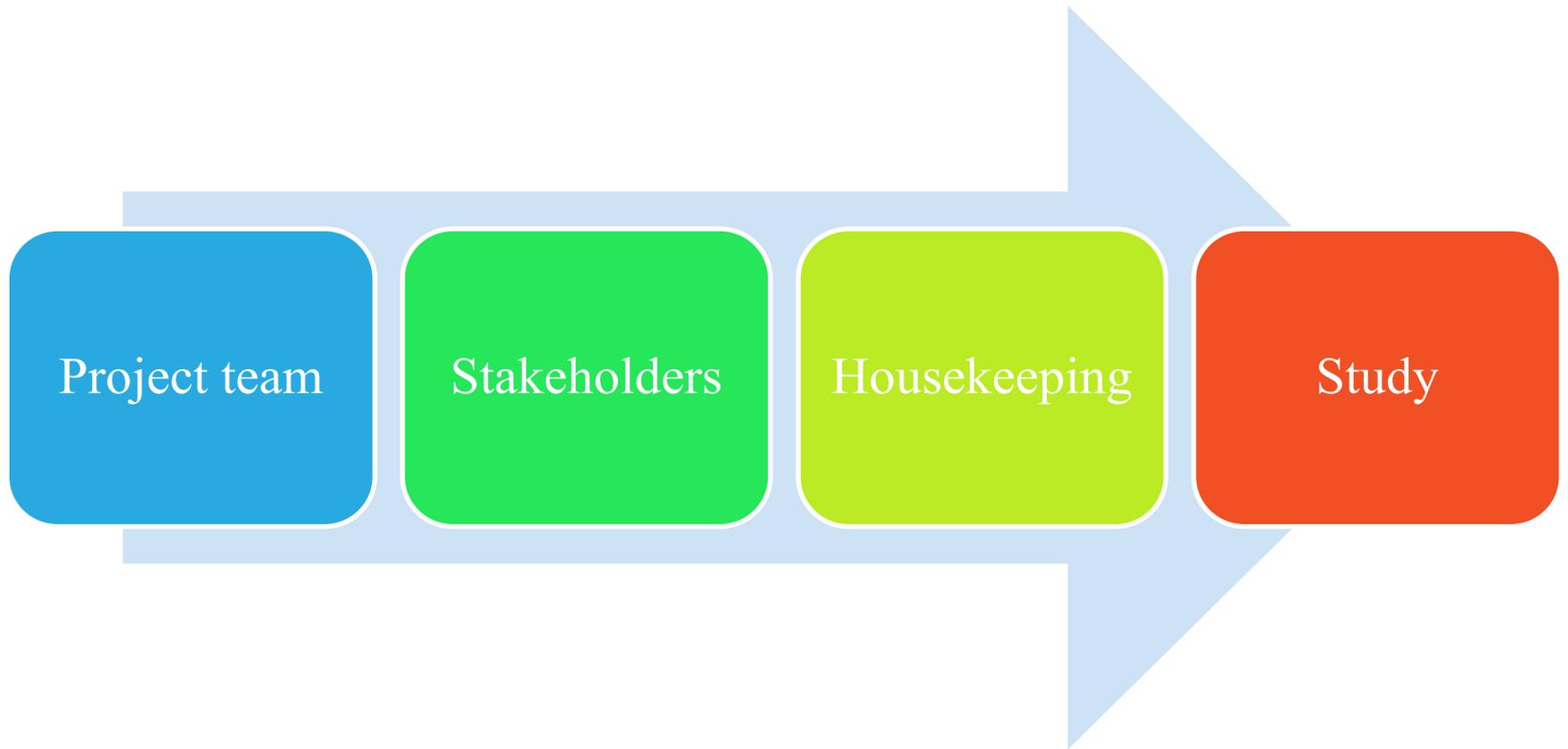


Break

5. SWOT
6. Next steps
7. Close



Introductions



The Study

- National Development Framework (NDF)
- NDF Consultation
- Scope of Research
- NDF Regions
- Study to be completed in February 2019



Polisi Cynllunio Cymru
Fframwaith Datblygu Cenedlaethol
Planning Policy Wales and the
National Development Framework

Planning in Wales

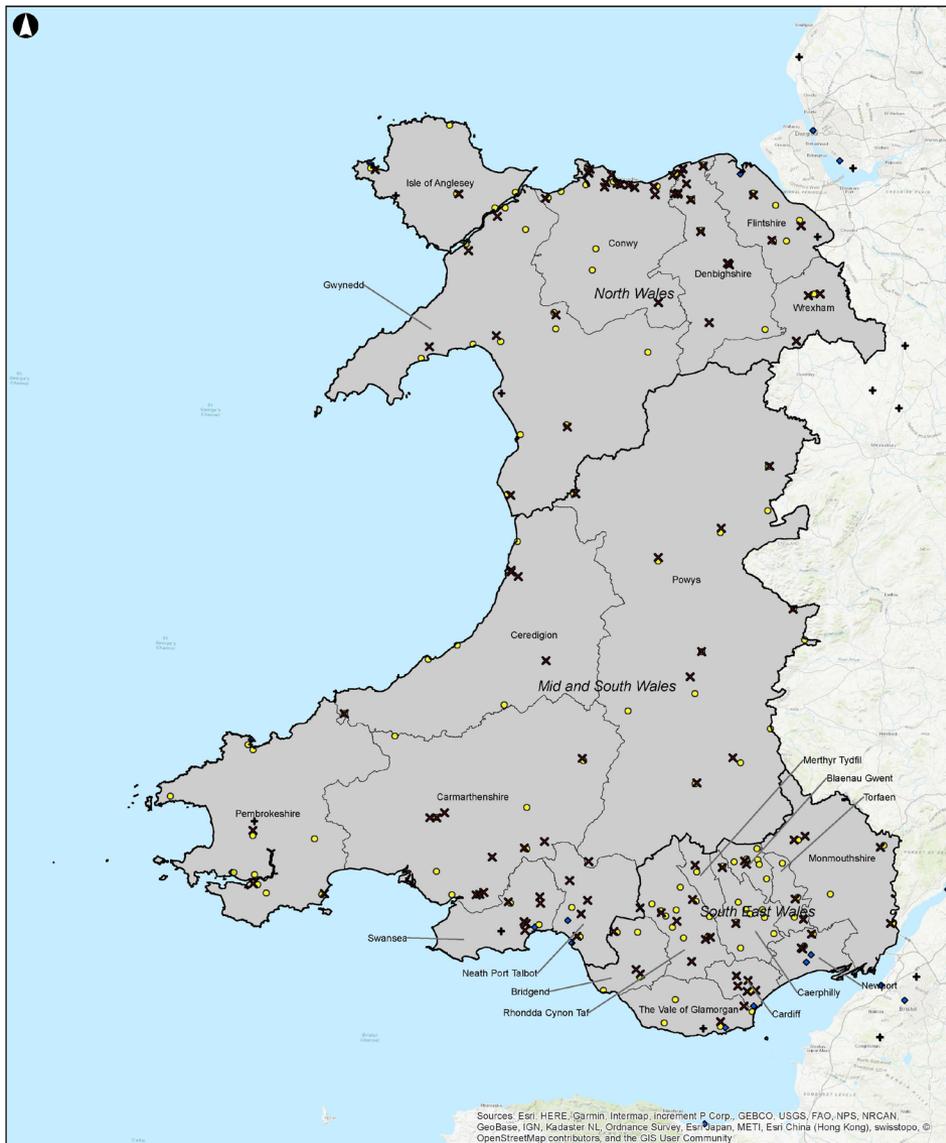


Llywodraeth Cymru
Welsh Government

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Data and Spatial Maps

Economic	Social and Cultural	Environmental
Employment	Population	National Parks
Unemployment	Key settlements	Designations
GVA	WIMD	AQMAs
GDP	Welsh language	Listed Buildings
Work in primary sector	Method of travel to work	Flood risk areas
Work in secondary sector	Educational attainment	Renewables
Work in tertiary sector	Road and rail	



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community



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Legend

- + Airports
- ✕ Hospital
- Key Settlements
- ◆ Ports

Client
Welsh Government

Job Title
NDF Research

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P1	20110218	CW	FG	DB
Issue	Date	By	Check	Appd



Welsh Hospitals, Key Settlements and Main Transport Links

Scale at A3
1:850,000

Client
Welsh Government

Job No
264350-02

Drawing Status
Issue

Drawing No
001

Issue
P1

Legend

- Railway Station
- Trunk Road
- Railway
- Welsh Regions
- Welsh County

Client
Welsh Government

Job Title
NDF Research

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P1	20110218	CW	FG	DB
Issue	Date	By	Check	Appd



Trunk Roads and Railways

Scale at A3
1:850,000

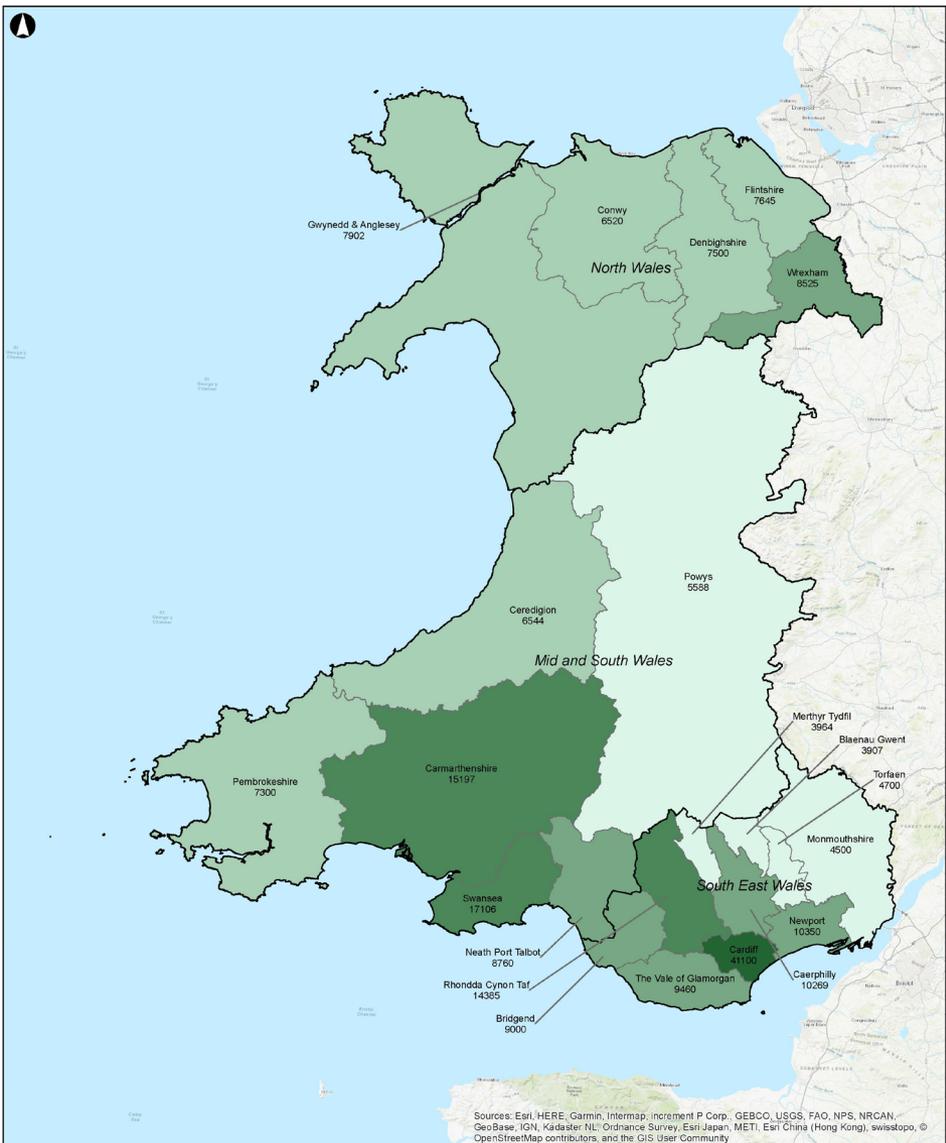
Client
Welsh Government

Job No
264350-02

Drawing Status
Issue

Drawing No
001

Issue
P1



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

Total Housing Provision (No. of Units)

- 3000 - 5750
- 5751 - 7950
- 7951 - 10500
- 10501 - 17500
- 17500+

Wales Region Boundaries

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P1	20/11/2018	CW	FG	DB
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Client
Welsh Government

Job Title
NDF Research

Scale 1:1850,000

Total Housing Provision

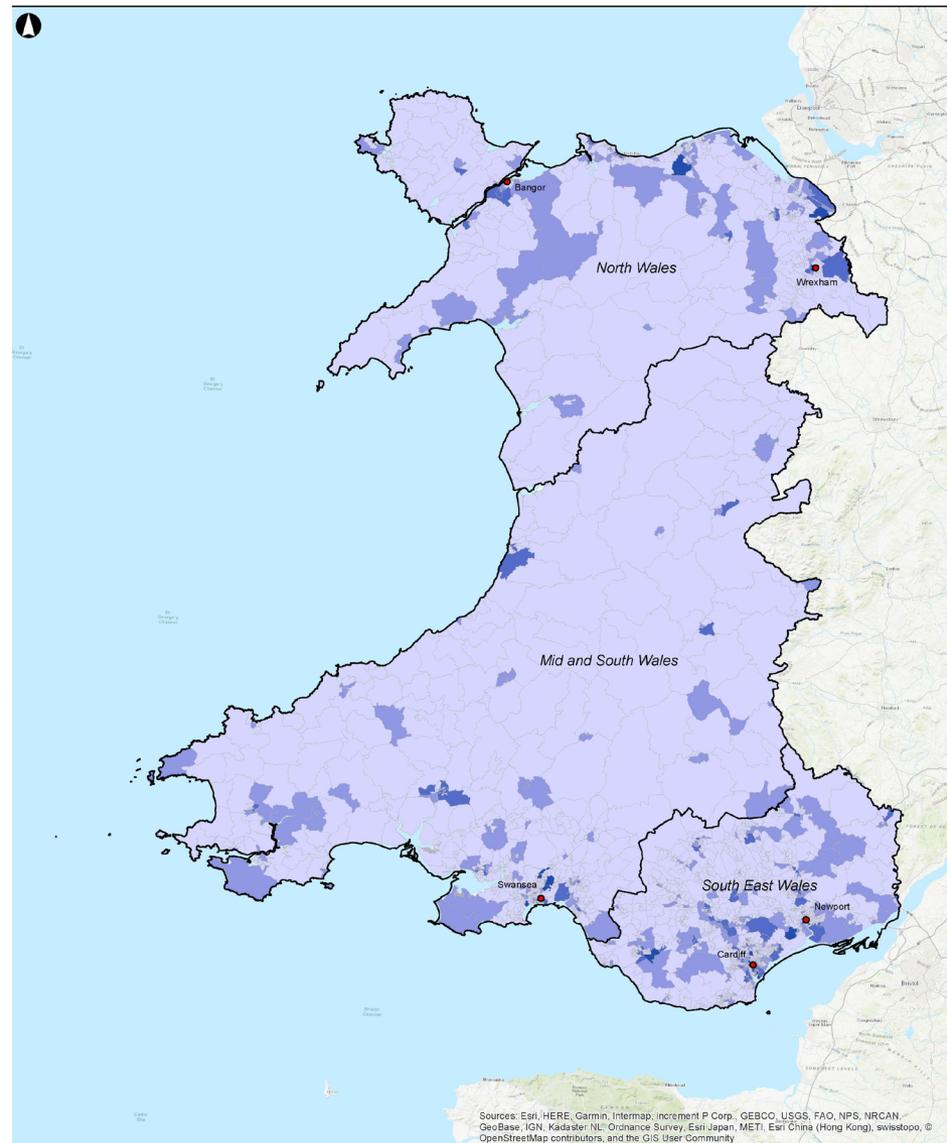
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Job No
284350-02

Drawing Status
Issue

Drawing No
001

Issue
P1



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

Total Retail Commercial (LSOA)

- 0 - 500
- 501 - 1800
- 1800 - 4800
- 4800 - 10800
- 10800 - 32000

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P1	19/11/2018	CW	FG	DB
Issue	Date	By	Check	App'd



Client
Welsh Government

Job Title
NDF Research

Scale 1:1850,000

Total Retail: LSOAs (Lower Layer/Super Output Area)

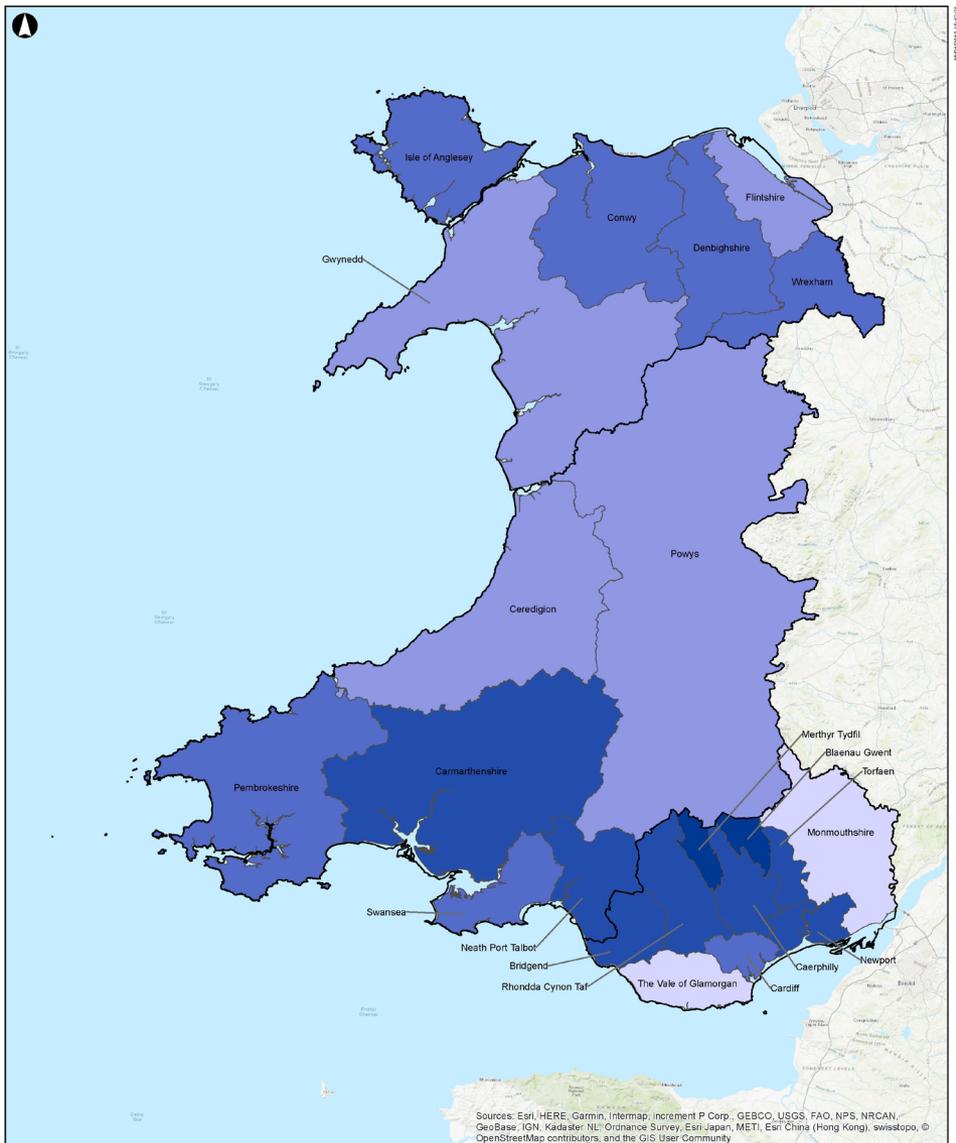
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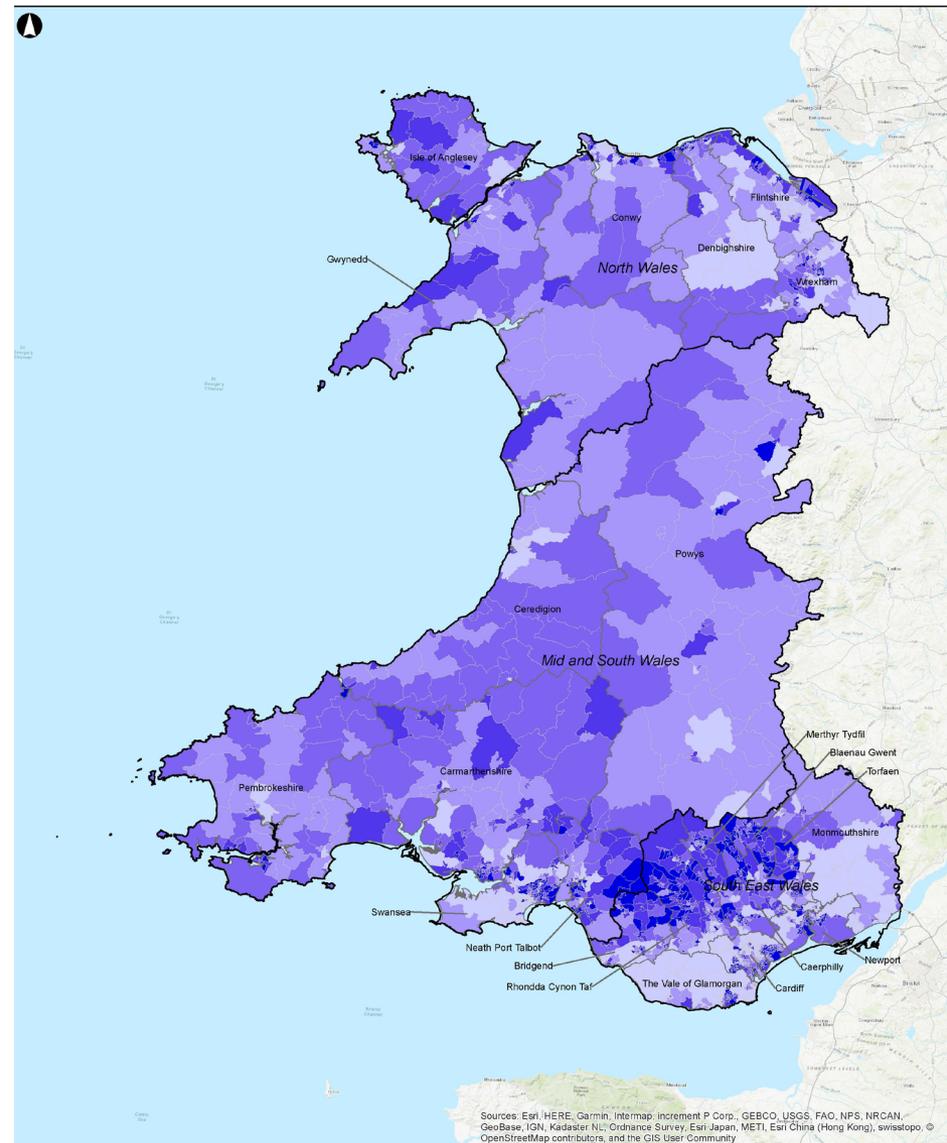
Drawing Status
Issue

Drawing No
001

Issue
P1



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community



Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

Welsh Index of Multiple Deprivation

- Most Deprived
-
-
-
- Least Deprived

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P1	20/11/2016	CW	FG	DB
Issue	Date	By	Chkd	Appd

ARUP

Llywodraeth Cymru
Welsh Government

Client
Welsh Government

Job Title
NDF Research

Scale at A3
1:850,000

Job No
264350-02

Drawing No
001

Drawing Status
Issue

Issue
P1

Legend

Welsh Index of Multiple Deprivation

- Most Deprived
-
-
-
- Least Deprived

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P1	20/11/2016	CW	FG	DB
Issue	Date	By	Chkd	Appd

ARUP

Llywodraeth Cymru
Welsh Government

Client
Welsh Government

Job Title
NDF Research

Scale at A3
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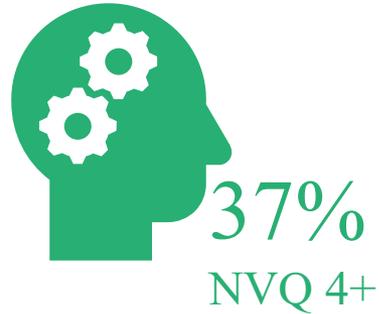
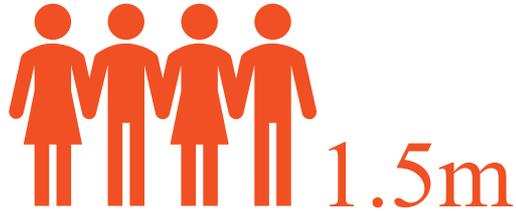
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Drawing No
001

Drawing Status
Issue

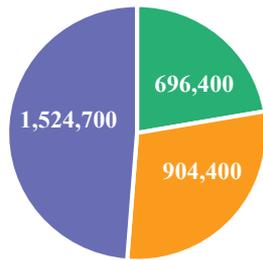
Issue
P1

Characteristics – South East Wales



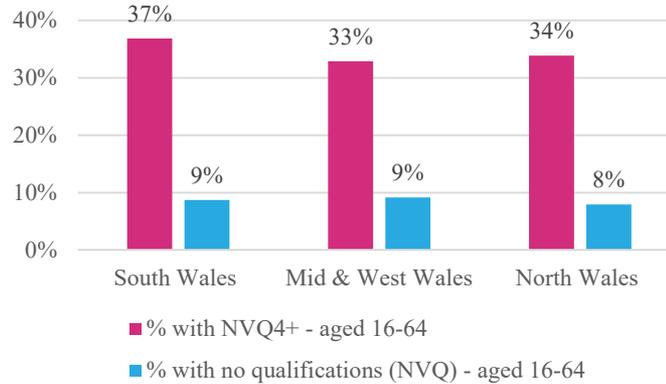
Trends – Comparison across Welsh Regions

Population

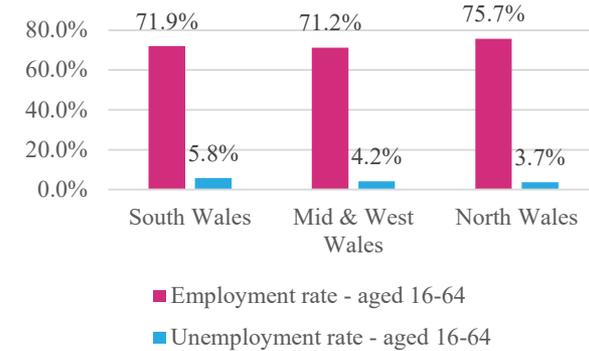


■ North Wales ■ Mid & West Wales ■ South Wales

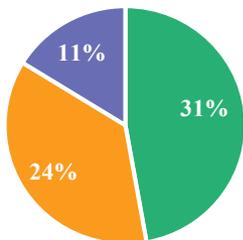
Educational Attainment



Employment and Unemployment

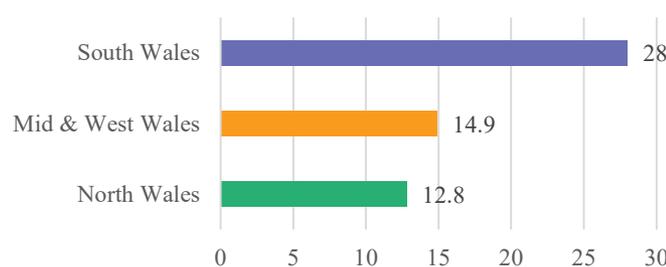


Percentage able to speak Welsh

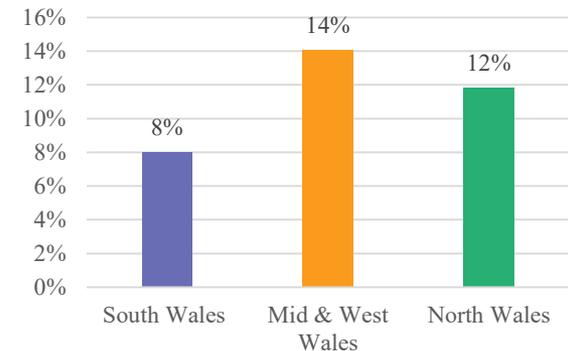


■ North Wales ■ Mid & West Wales ■ South Wales

Gross Value Added (Income Approach) by Local Authority (£bn)



Work mainly at or from home



Definitions and Issues

1. How a wide range of potential policy areas should be defined
2. Scale at which employment sites could be judged to be ‘major’
3. Location of ‘major’ centres of retail and commercial activity
4. The most important cross border linkages for your region

Please place a sticker in the area that best represents your choices.

Anything else please tell us....



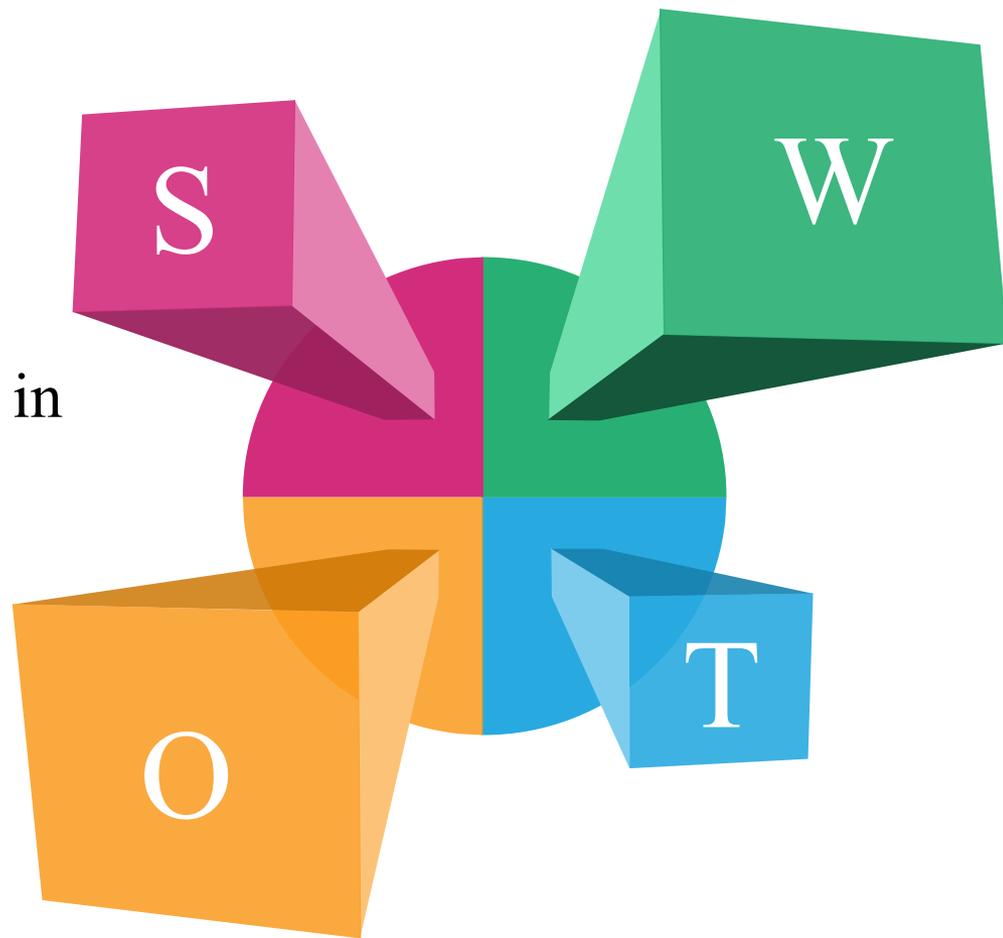
SWOT

Facilitated stakeholder activity in three groups:

1. Economic
2. Environmental
3. Social and cultural

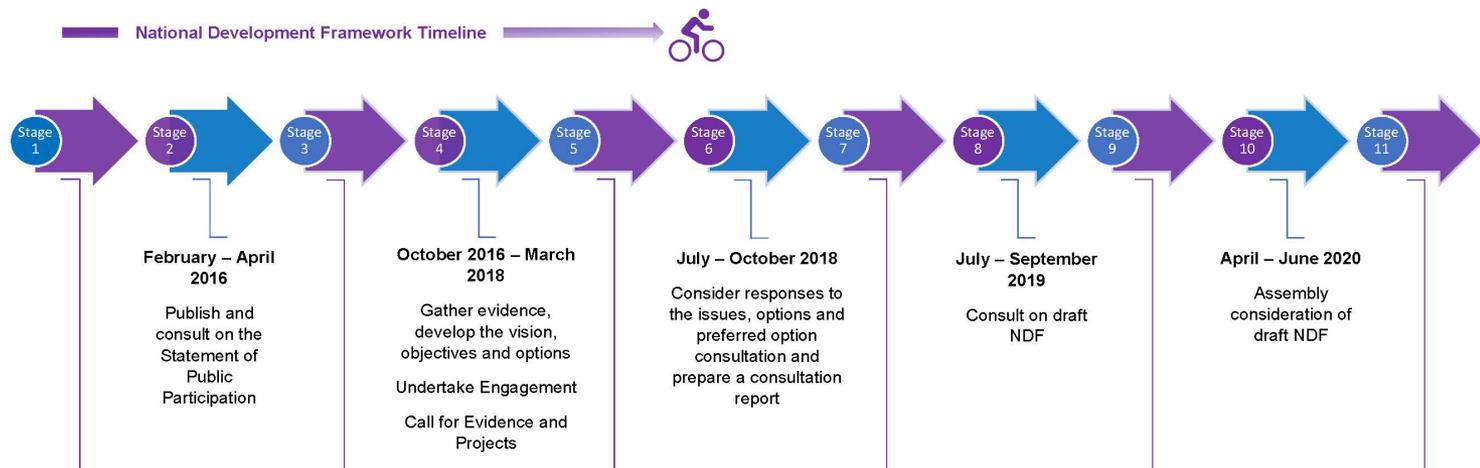
Structured around

- a) SWOT for the NDF
- b) Planning levers and barriers**
- c) Priorities for the region –
focusing on the **national scale**



Next Steps

- Factual Workshop Report
- Focused stakeholder meetings about projects and plans
- Data collection for publication via Lle Portal
- Study Report
 - SWOT to support the development of national planning policy
 - Provide direction for regional planning
- Publication of the NDF



Thank you

For further information contact:
Russell.Dobbins@gov.wales



Llywodraeth Cymru
Welsh Government

ARUP

Appendix B

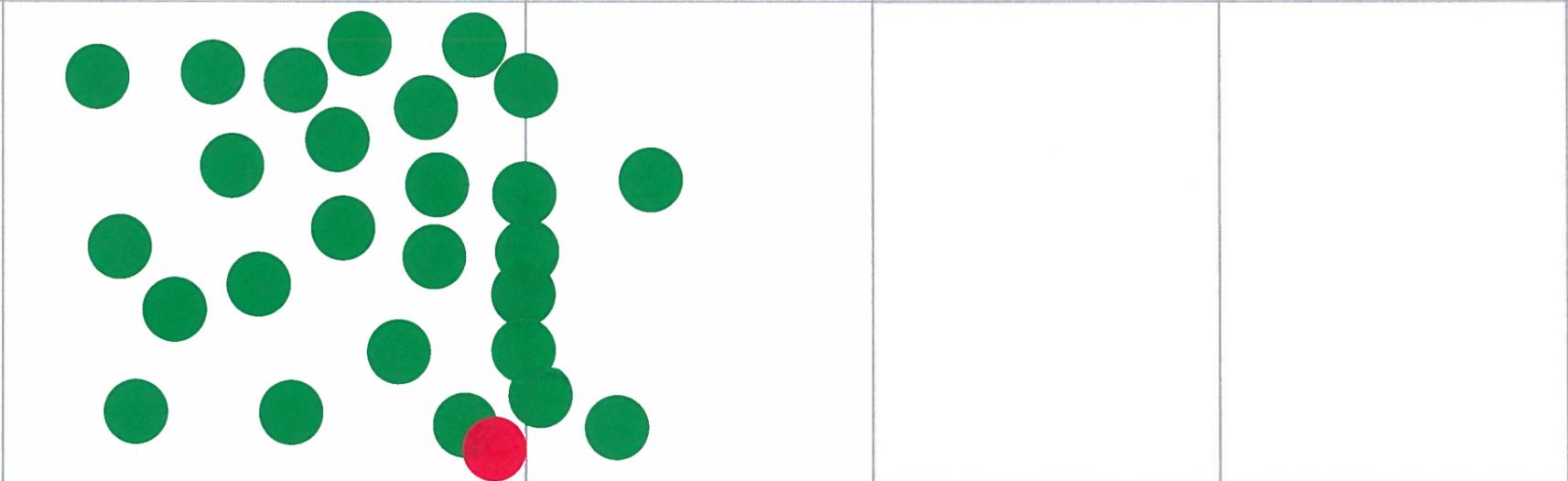
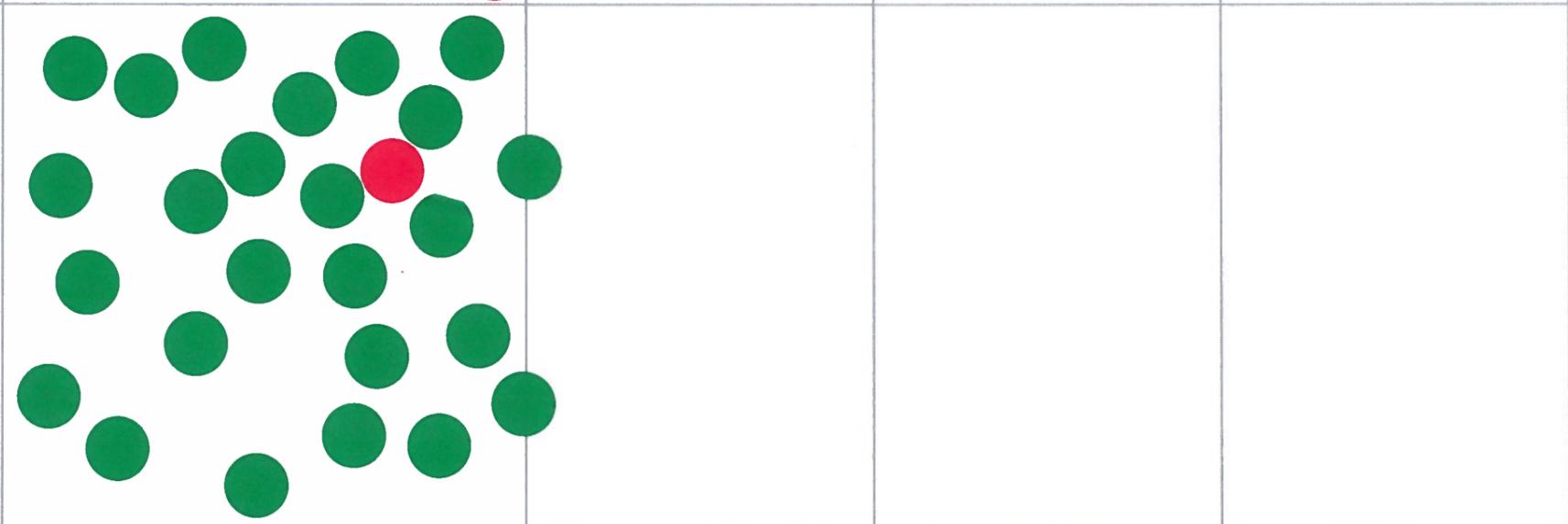
Sticky Dot Activity Outputs

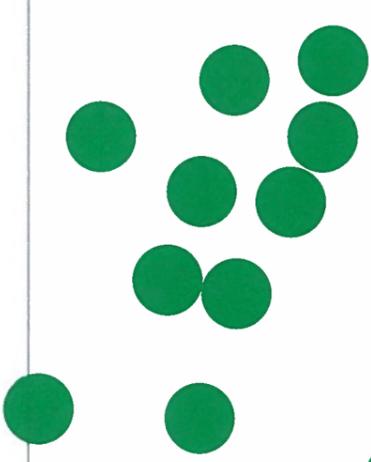
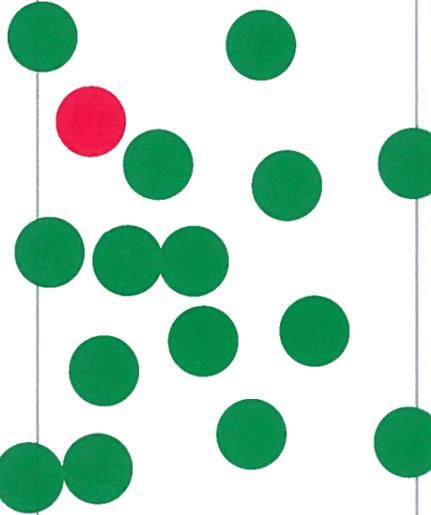
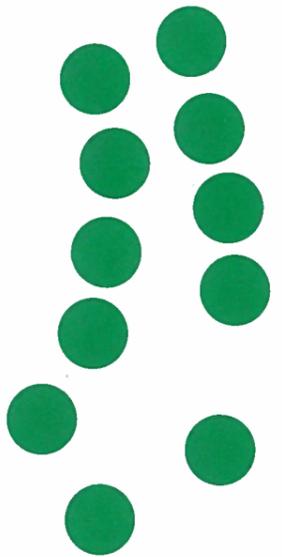
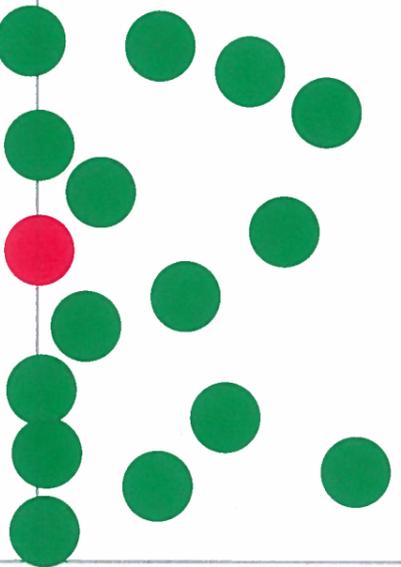
Diffinio meysydd polisi ar wahanol raddfeydd gofodol / Defining policy areas at different spatial scales

Isod, ceir rhestr o gwestiynau'n gofyn ar ba lefel y dylid diffinio ystod eang o feysydd polisi posibl. / Below is a list of questions asking at what level a wide range of potential policy areas should be defined.

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should ... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Hierarchaeth aneddiadau A settlement hierarchy					
Twf poblogaeth (rhagolygon) Population growth (forecasts)					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should ... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Materion strategol yn ymwneud ag iechyd a lles Strategic health and well-being issues					
Materion strategol yn ymwneud â'r Gymraeg Strategic Welsh Language issues					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should.... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Asedau amgylcheddol / adnoddau naturiol strategol Strategic natural resource / environmental assets					
Materion strategol yn ymwneud â chynllunio morol Strategic marine planning issues					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should ... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Anghenion tai fforddiadwy Affordable housing need					
Dyraniadau tai (unedau) Housing allocations (units)					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Amcanion neu dargedau trafnidiaeth strategol Strategic transport objectives or targets					
Amcanion neu dargedau trafnidiaeth egniol strategol Strategic active transport objectives or targets					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should.... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Egwyddorion creu lleoedd strategol Strategic placemaking principles					
Gofynion/cyngor dylunio strategol Strategic design advice/requirements					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should.... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Asedau treftadaeth adeiledig strategol Strategic built heritage assets					
Materion strategol yn ymwneud â llifogydd Strategic flooding issues					

	Dewisiadau / Choices				
Ar ba lefel y dylid diffinio...? At what level should... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Materion strategol yn ymwneud â mwynau Strategic minerals issues					
Materion strategol yn ymwneud â gwastraff Strategic waste issues					

Dewisiadau / Choices					
Ar ba lefel y dylid diffinio...? At what level should... be defined?	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Prosiectau ynni strategol Strategic energy projects					
Materion cysylltedd digidol strategol Strategic digital connectivity issues					

Dewisiadau / Choices					
Ar ba lefel y dylid diffinio...? At what areas should... be defined	Cenedlaethol National	Rhanbarthol Regional	Awdurdod Lleol Local Authority	Cymuned Community	Dim un (mater ar wahân i gynllunio neu byddai'n cael ei drin yn well yn rhywle arall) None (non-planning issue or best handled elsewhere)
Materion trawsffiniol Cross border issues					

Diffinio safleoedd cyflogaeth 'mawr' / Defining 'major' employment sites

Isod, ceir rhestr o wahanol raddfeydd er mwyn pennu pa safleoedd cyflogaeth y gellir eu hystyried yn 'fawr' at ddibenion y Fframwaith Datblygu Cenedlaethol.

Rydym yn deall bod cyd-destun rhanbarthol i'r term 'mawr', a allai amrywio ledled Cymru.

Below is a list of different scales at which employment sites could be judged to be 'major' for the purposes of the National Development Framework.

We understand that the term 'major' has a regional context, which may differ across Wales.

Ar ba raddfa y dylid diffinio safleoedd cyflogaeth 'mawr'? / At what scale should 'major' employment sites be defined?

Dewisiadau / Choices				
<p>50+ Hectar 50+ Hectares (e.e. Parc Busnes Awyrfod Sain Tathan, Porth y Gogledd, Sir y Fflint neu Barc Diwydiannol Gorllewin Abertawe)</p> <p>(e.g. St Athan Aerospace Business Park, Northern Gateway, Flintshire or Swansea West Industrial Park)</p>	<p>20 Hectar 20 Hectares (e.e. Ystâd Ddiwydiannol Gaerwen, Parc Hendre neu Europark Gwent)</p> <p>(e.g. Gaerwen Industrial Estate, Parc Hendre or Gwent Europark)</p>	<p>10 Hectar 10 Hectares (e.e. Parc Busnes Llanelwy, Parc Gwyddoniaeth Pen-y-bont ar Ogwr neu Barc Teifi, Aberteifi)</p> <p>(e.g. St Asaph Business Park, Bridgend Science Park or Parc Teifi, Cardigan)</p>	<p>5 Hectar 5 Hectares (e.e. Parc Busnes Tredegar, Ystâd Ddiwydiannol Penrhos neu Galon Cymru, Llandrindod)</p> <p>(e.g. Tredegar Business Park, Penrhos Industrial Estate or Heart of Wales, Llandrindod)</p>	<p>2 Hectar 2 Hectares (e.e. Parc Menter Wyeseide, Llanfair-ym-muallt, Ystâd Ddiwydiannol Gilchrist Thomas, Blaenafon neu Former Goods Yard, Llandudno)</p> <p>(e.g. Wyeseide Enterprise Park, Builth Wells, Gilchrist Thomas Industrial Estate, Blaenavon or Former Goods Yard, Llandudno)</p>
<p>The dot plot shows the following distribution of responses:</p> <ul style="list-style-type: none"> 50+ Hectar: 15 green dots 20 Hectar: 10 green dots and 1 red dot 10 Hectar: 5 green dots 5 Hectar: 2 green dots 2 Hectar: 1 green dot 				

Blaenoriaethu Materion Trawsffiniol / Prioritising Cross Border Issues

Yn eich barn chi, beth yw'r materion trawsffiniol pwysicaf ar gyfer eich rhanbarth? / What do you consider to be the most important cross border issues for your region?

Gosodwch sticer yn hyd at dri dewis. / Please place a sticker in up to three choices.

Cysylltiad Linkage	Dewis Choice
Seilwaith ynni Energy Infrastructure	
Cyflogaeth / gweithle Employment / place of work	
Tai a chymunedau Housing and communities	
Llafur / gweithwyr / sgiliau Labour / employees / skills	
Manwerthu / masnachol a hamdden Retail / commercial and leisure	
Gwasanaethau a chyfleusterau Services and facilities	
Trafnidiaeth a theithio Transport and Travel	



Diffinio canolfannau gweithgarwch masnachol a manwerthu 'mawr'

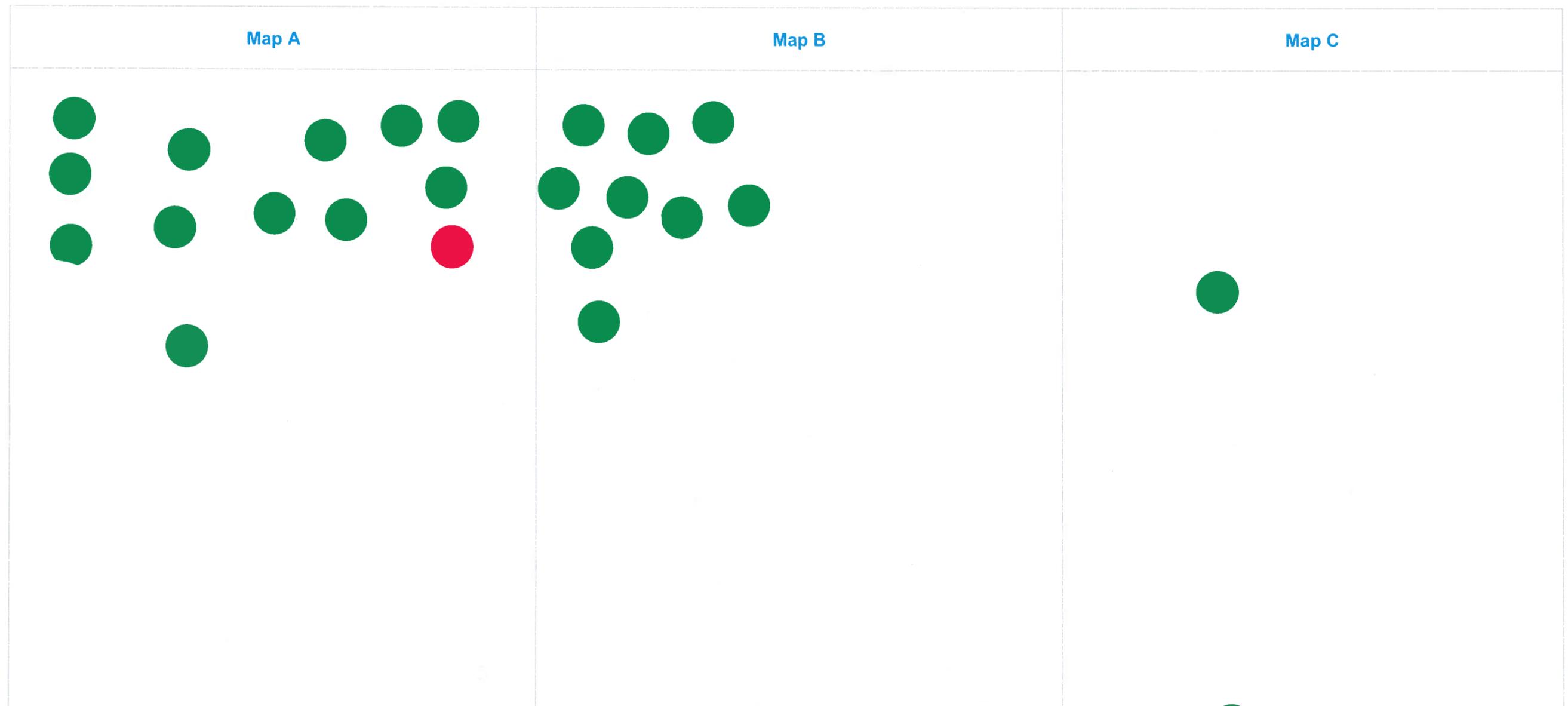
Defining 'major' centres of retail and commercial activity

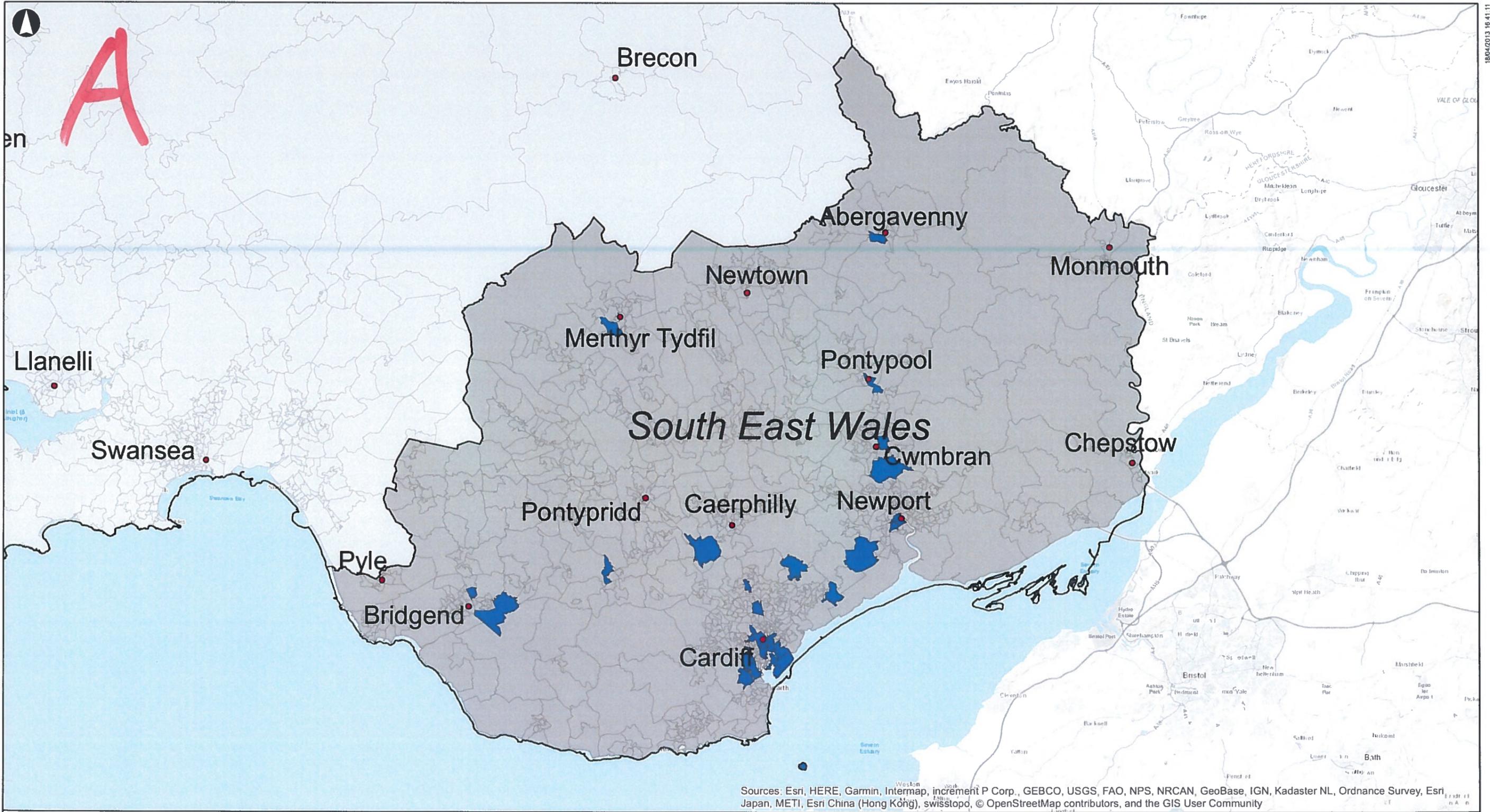
Isod, ceir tri map sy'n dangos canolfannau gweithgarwch masnachol a manwerthu yn seiliedig ar drothwyon uchel, canolig ac isel Data'r Arolwg Cyflogaeth a'r Gofrestr Fusnes

Below are three maps that show centres of retail and commercial activity based on high, medium and low thresholds of Business Register and Employment Survey Data.

Yn eich barn chi, pa fap sy'n cynrychioli'r canolfannau 'mawr' yn eich rhanbarth?

Which map do you agree best represents the 'major' centres in your region?





Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri, Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

- Legend**
- Total Retail Commercial >3,000
 - Welsh Region Boundary
 - South East Wales

P1	01-02-08	CW	FG	DB
Issue	Date	By	Chkd	Appd



Client
Welsh Government

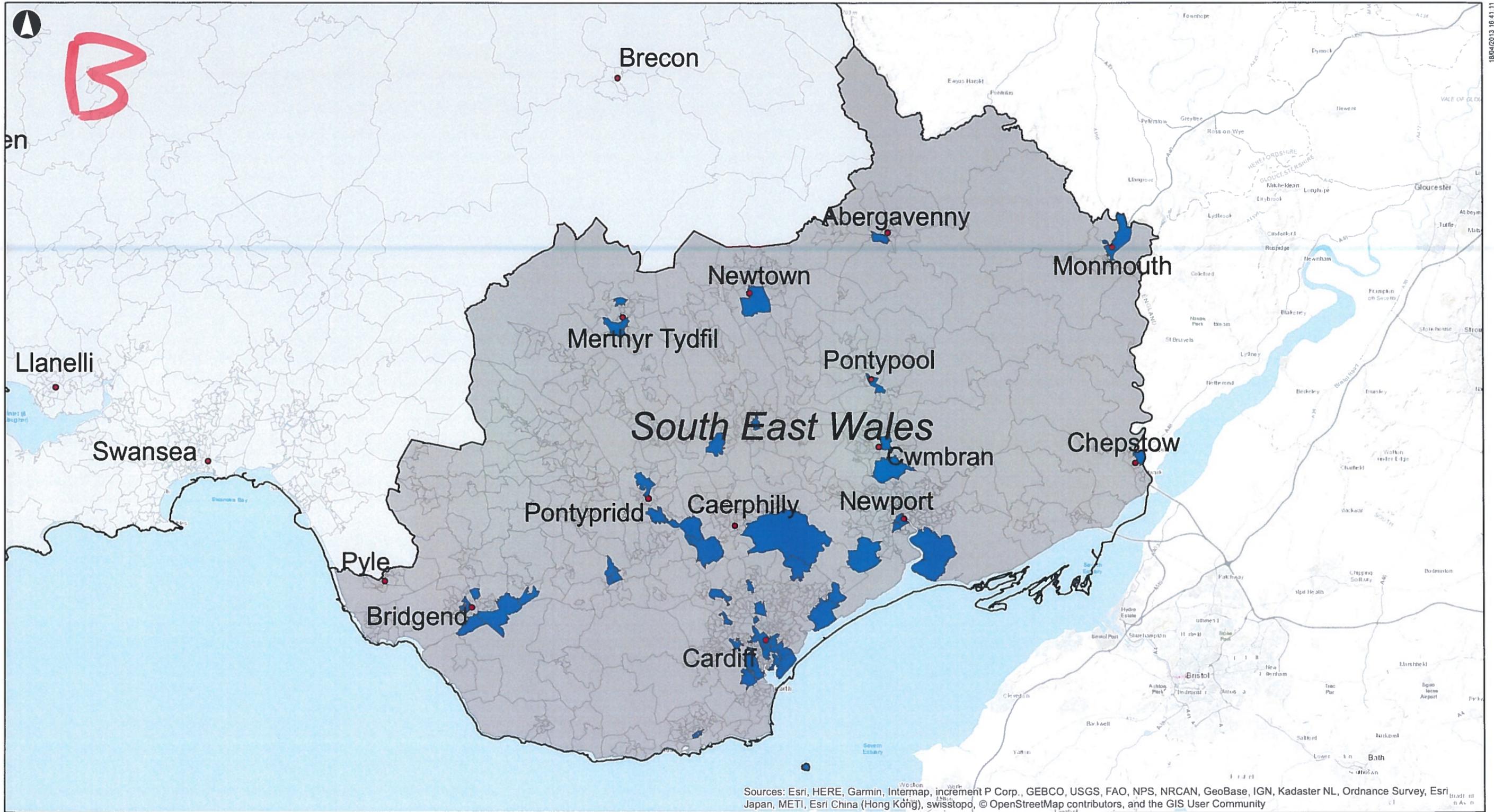
Job Title
NDF Research

MAP A: Total Retail Commercial: LSOAs with >3,000 (South East Wales)

Scale at A3
1:350,000

Job No 264350-02	Drawing Status Issue
Drawing No 001	Issue P1





Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

- Total Retail Commercial >2,000
- Welsh Region Boundary
- South East Wales

P1	01-02-08	CW	FG	DB
Issue	Date	By	Chkd	Appd

ARUP

Llywodraeth Cymru
Welsh Government



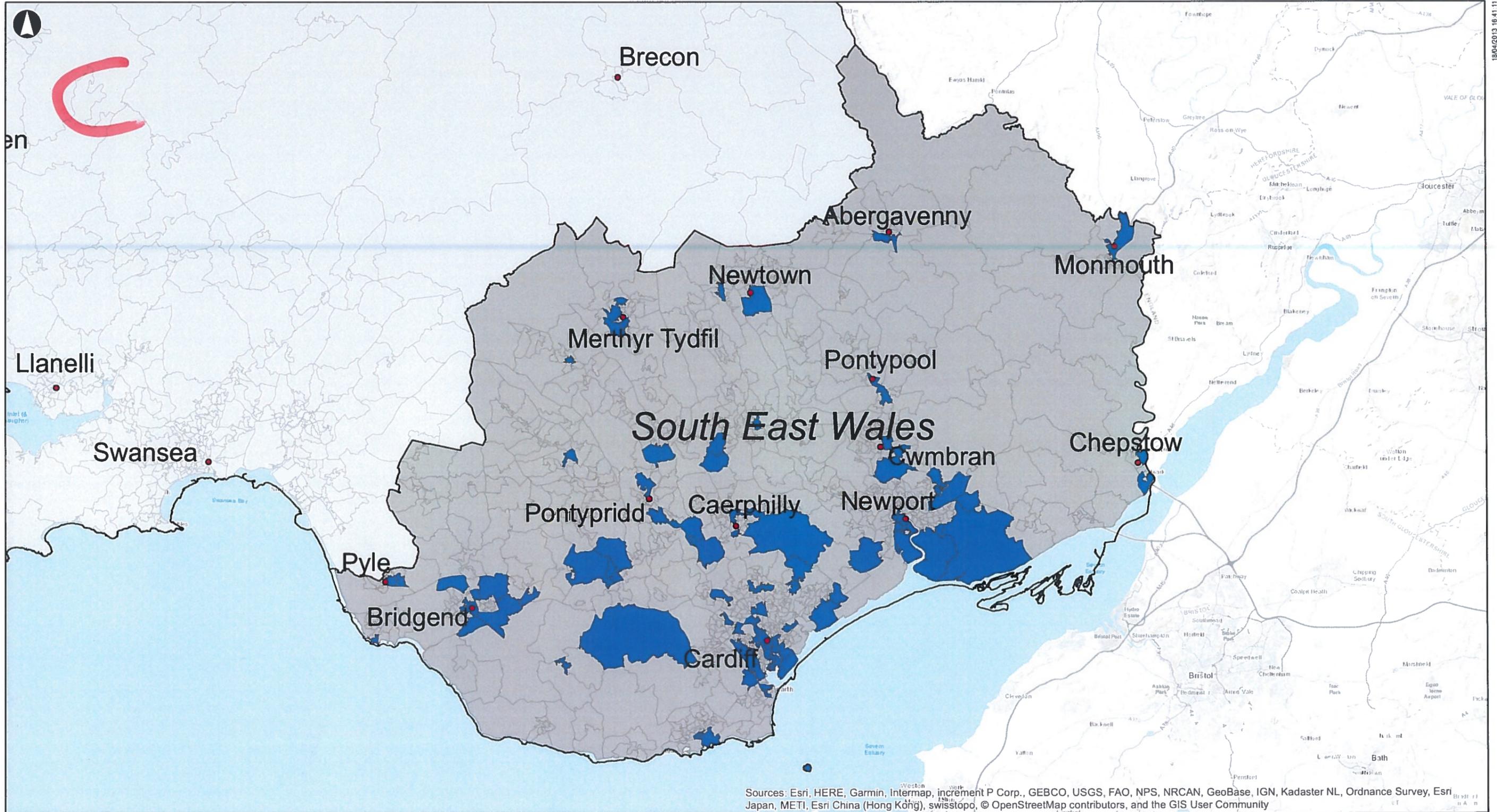
Client
Welsh Government

Job Title
NDF Research

MAP B: Total Retail Commercial: LSOAs with >2,000 (South East Wales)

Scale at A3
1:350,000

Job No 264350-02	Drawing Status Issue
Drawing No 001	Issue P1

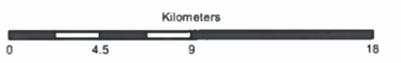


Sources: Esri, HERE, Garmin, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), swisstopo, © OpenStreetMap contributors, and the GIS User Community

Legend

- Total Retail Commercial >1,000
- Welsh Region Boundary
- South East Wales

P1	01-02-08	CW	FG	DB
Issue	Date	By	Chkd	Appd



Client
Welsh Government

Job Title
NDF Research



MAP C: Total Retail Commercial: LSOs with >1,000 (South East Wales)

Scale at A3
1:350,000

Job No 264350-02	Drawing Status Issue
Drawing No 001	Issue P1

Appendix C

SWOT Activity Photos



The whiteboard is divided into six main sections, each containing numerous colorful sticky notes:

- STRATEGIES:** Contains notes on various strategic initiatives and goals.
- ECONOMIC:** Focuses on economic factors, possibly related to the company's market or industry.
- OPPORTUNITIES:** Lists potential areas for growth or new business ventures.
- THREATS:** Identifies risks and challenges that could impact the organization.
- PLANNING GOALS/BARRIERS:** Details specific objectives and the obstacles that might hinder their achievement.
- PRIORITIES:** Highlights the most important tasks or areas that require immediate attention.



STRENGTHS

THE ENVIRONMENT

VIABLE SITES ALONG M4

DIVERSITY / ECON

STRATEGIC IND'L LAND

PORTS
- NEWPORT
- CARDIFF

TRANSPORT NETWORK
- METRO

RETAIL

BIO SCIENCES

UNSUSTAINABLE SITES?

PROFESSIONAL SERVICES

AEROSPACE / AIRPORT

CROSS-BORDER LIVE-WORK

UNI'S + COLLEGE

SEMI-CONDUCTORS

CENTRAL GOVT SERVICES

SPORTS + ENTERTAINMENT

AGRICULTURE

BRAIN DRAIN?

BRINGING YOUNG PM W

OPPORTUNITIES

LOWER LAND VALUES THAN OVER THE BORDER

TOWN GROWTH

TARGETING DEPRIVED AREAS

CITY DENK

PORT EXPANSION

METRO

META

M4 TOLLS

REXIT-NEW APPROACHES

SMALLER SCENE - LIVE-WORK

MORE RES / REINVENT TOWN CENTRES

DIGITAL CURATOR

RENEWABLE ENERGY

LOCAL UNIVERSITIES

M4?

M4 SECOND CROSSING?

FOUNDATIONAL ECONOMY - RETAIL + SEMI LOCAL

AGEING POP / STILL WORKING / TRANSPORT

TOURISM - COSTA

DISTRIBUTION & SERVICE TRANSITION

FUTURE TECH / JOBS

SHRINKING WORKING AGE POP

PUBLIC LAND TO FACILITATE AFFORDABLE HOUSING

GOVT FOCUS ON APPRENTICESHIP & DIGITAL TECH

DEMAND FOR SME SPACE

START-UPS

DEPENDENCY RATIO

ECONOMIC

WEAKNESSES

COST OF TRANSPORTING GOODS
- TIME
- £

LIMITED LRG IND'L SITES

SITES - PROXIMITY TO PORTS.
SURFACE SENSITIVITY

TRAIN CONNECTIVITY (FI-FI)

GRID + DISTRIBUTION CAPACITY

MKT-DRIVEN ENERGY INVESTMENT ONLY

SKILLS AVAIL

FRAGMENTED SMALL-SCALE

SITES^{AND} NEAR PORTS

M4 CONGESTION @ BRISTOL

SEVERN RAIL TUNNEL SIZE (PANTS)

ONLINE RETAIL

LOW WAGE COUNTRIES

BRAIN DRAIN?

TECHNICAL SKILLS - E.G. SURVEYING, GEOTECHNICALS

PARADOXICAL COMMUNITIES

M4 @ BRISTOL

LPA: HANGING ON TO EMP LAND

POLITICS/ REGEN - VALLEYS

SUSTAINABLE COMMUNIT

METRO.

DECARBONISATION LOW/ GRID

THREATS

ENERGY/ REGEN LONG-TERM INVESTMENT PROGRAMME

SKILLS AGENDA?

FLOOD RISK.

NEED IN DEPRIVED AREAS

BREXIT - NEED DISTRIBUTION

M4?

PERPETUATING CAR USE

PUBLIC SECTOR EMPLOYMENT

RETAIL - HIGH STREETS

PROPPING UP INDUSTRY/ PUBLIC SUBSIDY/ RELIANCE

AIR QUALITY

SHRINKING WORKING AGE POP

RETAIN STUDENTS IN WALES?

DEPENDENCY RATIO

PLANNING LEVERS / BARRIERS

B1/B2
 BAD NEIGHBORS
 CANAL CENTRE
 ENTERPRISE
 ZONE
 PD
 LIGHTS
 FOR POTS
 NEW ZEALAND
 ACT
 LINKS
 CARDIFF
 AIRPORT
 ACCESS
 SME
 POLICY
 NOT
 PRESCRIBING
 PLEASE!
 CANAL
 AROUND
 RETURN
 CITY
 DEAL
 CPO -
 LAND
 ASSIGNMENT
 INTENSIVE
 IN
 THE MKT?
 VIABILITY?
 DON'T
 OVER
 SPECIALISE
 PLANNING
 MORE
 AGILE
 NAT'L
 ECONOMIC
 DEBATE.
 BOTTOM UP /
 SUSTAINABLE
 COMMUNITIES
 - NEEDS /
 FORMS
 ENERGY?
 TANB
 FRAGMENTED
 ORG'S +
 APPROACHES
 UP TO ONE
 PLANNING
 FRAMEWORKS
 LDP / SPP / NDP
 POST-
 BREXIT -
 TAKE STOCK
 FUNDING
 FOR
 SMEs
 HAS
 GOVT GOT
 THE
 WRONG
 LAND?

PRIORITIES

GRAD
 FUTURE
 SKILLS
 CONNECTIVITY
 - PHYSICAL
 - VIRTUAL
 INTERNATIONAL
 CONNECTIVITY/
 FLIGHTS.
 FUTURE
 TILE
 VALUES -
 NEW APPROACH.
 NEEDED TO
 PLAN AT
 A REGIONAL
 LEVEL.
 PLAN FOR
 BOTH
 GROWTH +
 DECLINE.
 PLNG
 SCOTTISH
 EMP v HOUSING
 FUNDING -
 PUMP-PRIMING /
 BORROWING
 SUPPORT
 FOR
 MIDDLE
 TIER
 DEVELOPERS
 LIMITED
 INCOME

STRENGTHS

- Health benefits of lean infra
- Minerals Policy - Away from fossil fuel
- Amount of Designated Sites / Gw.
- ENV Resources - Attract people
- Proximity of Resource to pop?
- Reynolds Strong
- Diversity of Resource
- Demand Centres closer to generation
- Ports as Strategic Infra

OPPORTUNITIES

- Enhancement through Dev.
- Enhancement
- Protection of the Areas
- Look beyond Present in terms of lean infra.
- Resilience Investment in lean infra.
- Custom Land.
- Geo-system Services (Payments)
- Carbon + Dev
- Hybrid Renewable Proj.
- Heat District heating
- Tidal Energy
- Intelligent Grid
- EV
- Renewables - Solar vs wind
- WFGA
- Technology
- Infra Policy / Link to FH
- Sus transport - Localised travel
- Iron bit of transport schemes considered more
- Strategic Plans for Center Mgmt / Flood defense
- Nature based Solutions
- Benefits of Centralisation (Carbon intensity) Proximity to port etc
- Stop Specify Min standards (eg road / green sm)

ENVIRONMENTAL

WEAKNESSES

Restriction
on Bat
Storage

gen at times
of low
demand

Disconnect
Waste arising
/ where dealt
with

Air
Quality

Only Plan
for new.
Plan to improve
existing

Plan for
dev not
for environ
/ life in gen

How better
based solutions
are delivered?

Minerals
- Coal (gas)
extraction vs
new policy.

Waste -
on whole
LRA level
- should be
higher

Cross-border
Waste
- taking
Capacity

Quality of
built env.
(Poor)

Housing
Stock
(Energy efficiency)

EV
Infra

Built env
facilitating
social inclusion

life cycle
costing
for dev.

M4
- Needs a
Solution
Air Qual

THREATS

Sufficient
Waste
facilities

Storage
(Energy)

Urban Env
- Pressure on
Green spaces
for Dev

Grid
Capacity
/ subsidy

Amount of
Planned dev
/ dev pressure

Get 'Balance'
wrong

Maintenance
of Green
Infra

Grid
Might

Green space
in new dev
& might
of existing

Transport
Cost - Benefit
Driven by
economics

PLANNING LEVERS / BARRIERS

WFGA
/ENV
ACT
Link

Planning
as a
facilitator

Importance
of FGA
discussing
across sectors

'BALANCE'

Resilience
Env / Econ
/ Social

EU
infrastructure
What scale?
Household?

Strong
MSG Around
infrastructure

Environment
is everything
not just
designations

'Asset'

PRIORITIES

Regional
Planning.

Strategic
sites
(heat)

Waste

Think
holistically
around dev.
Not trying
to fit

Valleys
regional Park
Env Assets

STRENGTHS

Community
spirit /
identity

Ethnic
diversity
in urban
areas

Cultural
heritage

Transport
planning

Environment

Cultural
identity,
nationality
& regionality

SOCIO-CULTURAL

WEAKNESSES

Rural places
- different demographic

Tourism & language (signs)

Areas of deprivation / inequalities

Failing to deliver sufficient number of homes

Transport problems, impacting on the poorest

Ability to deliver on obligations through housing

Joined up transport planning?

Committing & damage to communities (mammoth)

Moving away from identity development

Large housing development & sustainable transport

place-making (development) holistic approach

Rural isolation & service delivery

else language regional / local tourism

Education location of good schools drives population movement

Difficulties changing behaviours (sustainable travel)

Uneven distribution of digital connectivity

Lack of joined up working - housing & health

Development driven by market forces - main services

Sectoral approach to planning

Future of work

Higher unemployment levels + opportunity

THREATS

Future skills requirements

crisis

good
drives
population
movement

difficulties
changing
behaviors
(sustainable
travel)

uneven
distribution
of digital
connectivity

working -
housing &
health

Development
driven by
market -
forces
- main
services

Sec
app
to

Future
of work

Higher
unemployment
levels
+
opportunities

THREATS

Future
skills
requirements

Welsh
government
funding
model.

Climate
change
|
flooding

Housing
& ageing
communities
- social
care

crisis

good
drives
population
movement

difficulties
changing
behaviors
(sustainable
travel)

Uneven
distribution
of digital
connectivity

working -
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Development
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THREATS

Future
skills
requirements

Welsh
government
funding
model.

Climate
change
|
flooding

Housing
& ageing
communities
- social
care

PLANNING LEVERS / BARRIERS

Limits
to planning

Clarity &
on how
things are
being delivered

Economies
of scale
in terms of
affordable
housing
delivered

public
transport
prior to
development

Active
involvement
of communities
& Future
Generations

Planning for
Elderly
access to
services
once stopped
driving

PRIORITIES

planning
for an

NDF to

Attract
businesses

NDF as
a new
cross-sectoral

Engaging
with Future

Sustainable
transport
&

prior to development

Active involvement of communities & Future Generations

Planning for Elderly access to services once stopped driving

PRIORITIES

Planning for an ageing population

NDF to provide more support to LPAs

Attract businesses into rural areas

NDF as a new cross-sectoral approach to development/ planning

Engaging with Future Generations

Sustainable transport & planning

Embed community feel

Can planning system match city-region deal vision?

planning + health board working

NDF Shaping growth within the region

NDF cultural side of place-making

Bravery to do things differently

More holistic approach to development (more social & cultural considerations)

Need for appropriate funding of NDF

Housing for older people

planning for rural

Addressing deprivation Healdy Valley

Traveller transit sites - strategic overview

Numbers + quality (development)

Appendix D

South East Wales Event Register

National Development Framework: Research into Regions and Rural Areas (South East Wales Region)

Location: Arup, Cardiff

Date: 7th December 2018

Regional Workshop – 10:00 – 12:30pm

Name	Organisation	Also attending Rural workshop (✓)	
1	RICHARD MATTHAMS	BCBC	
2	JONNI TOMOS	WG	✓
3	ION FUDGE	WG	
4	Gareth Hall	WG	✓
5	SM Burgess	Institution of Civil Engineers	X
6	Gareth Denning	BCBC	X
7	Owen Jones	UCTCBC	✓
8	PAUL CHASE	TFW	✓
9	JEREMY SMITH	Renewable UK Cymru.	X
10	Koren Torbox	Mon Housiq ASS	X
11	JONATHAN PARSONS	BCBC	
12	Rhuan Kyte	Caerphilly,	X
13	Ryan Norman	Welsh Water	✓
14	Robert Murray	Torfa CBC	✓
15	ADRIAN JAMES	NRW.	X
16	Chri Cyer	Ag Cymru.	X
17	Matthew Sharp	Newport CC	X
18	Marcus Blayney	C+IC / WW+L	✓
19	Gemma Beynon	NRW	X
20	L Athwood	hirc	X

A factual, bilingual and anonymised Workshop Report will be produced to record the events.

Some photographs may be taken of this event.

Should you have any concerns, please contact a member of the project team.

21	Neil Hamz	Cardiff University	X
22	TOM EVANS	Swansea Council	X
23	Ryland Jones	Sustrans	X
24	Mark Roberts	Bob Williams	
25	CALLUM COOPER	ABP.	X
26	JOHN RAINE	MTCBC	✓
27	Vicky Robinson	Vale of Glam	✓
28	Shirley Williams	Cardiff CC	X
29	J. MELCOMBS	WPD.	✓
30	James Byrne.	Wildlife Trust	X
31			
32			
33			
34			
35			
36			
37			
38			
39			
40			

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