

9. Regional SWOT Report

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Llywodraeth Cymru
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ARUP

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1 Introduction

1.1 NDF Context

Following the consultation on the National Development Framework (NDF) Preferred Option in the summer of 2018¹, 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.

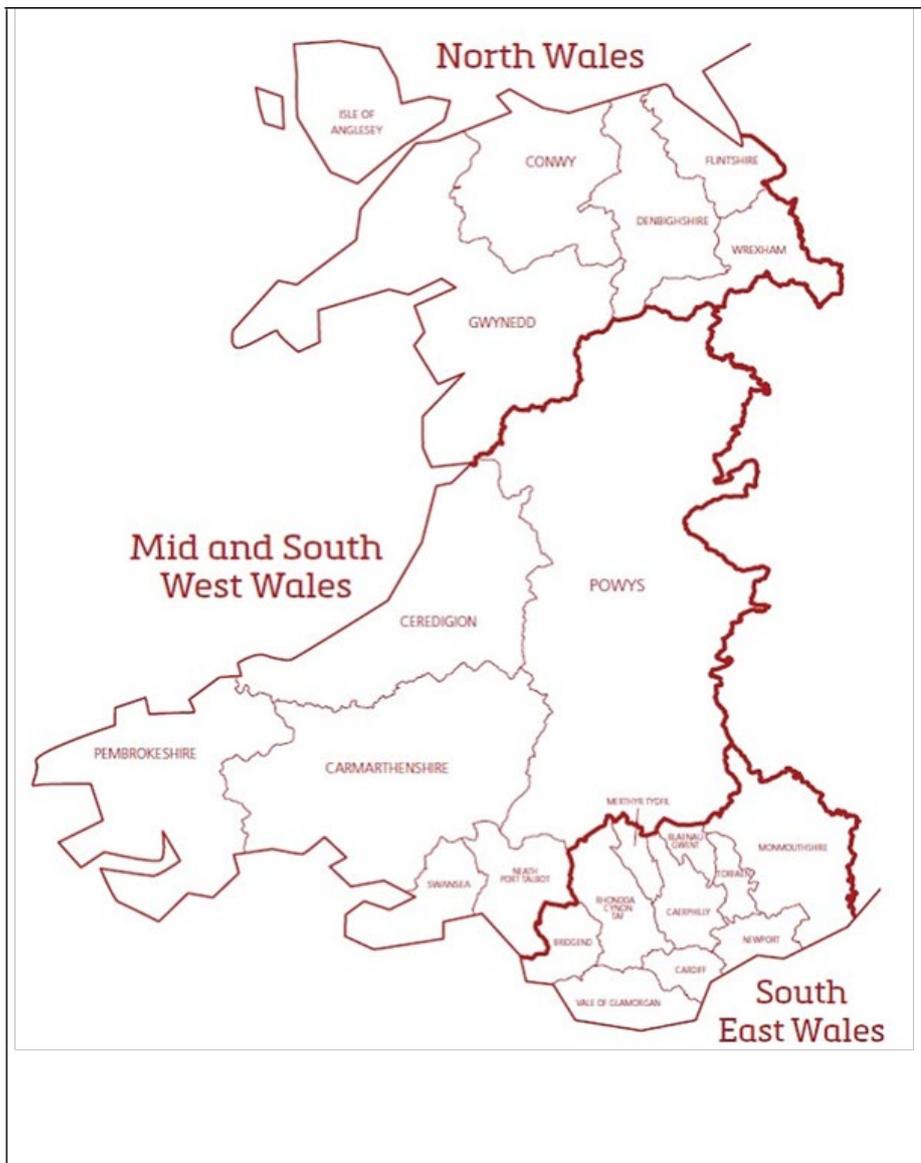


Figure 1 NDF Regions

¹ <https://beta.gov.wales/national-development-framework-issues-options-and-preferred-option>

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 Act 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).

The programme for the NDF is illustrated in Figure 2 below with consultation on the Draft NDF planned for July to September 2019 and Assembly consideration of the Draft between April and June 2020.

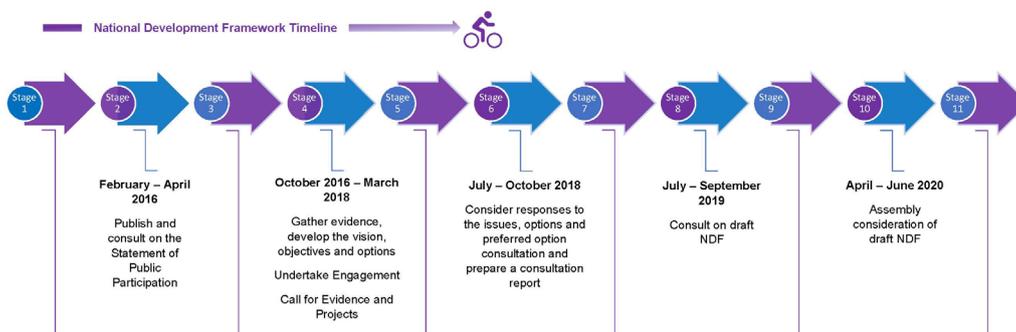


Figure 2 NDF Timeline

1.2 Approach

The objectives for this Regions and Rural Areas Research Study are:

- To develop an evidence base for each NDF region that supports NDF policy development and using this, to identify the issues and spatial areas NDF policies should focus on;
- To identify broad rural areas and develop an evidence base that supports NDF policy development and using this, to identify the issues and spatial areas NDF policies should focus on; and
- To involve stakeholders in a and b.

To help achieve the study objectives, Ove Arup & Partners (Arup) who were commissioned to undertake this Study, produced a suite of reports that address the requirements for the study. These are summarised in Table 1 below:

Table 1 Study Approach and Reports

Output	Reports	Contents
Study Overview	1. Study Overview	a) NDF context, purpose of study and reports, Arup's involvement
Data and Definitions Report	2. Data and Definitions Report	b) Introduction including context, purpose of study and reports, and structure c) Data collection including approach, method, cooperation, findings, stakeholder feedback, how data has been utilised in the research with tables and maps. d) Defining 'Major' –including employment sites, retail/commercial sites, generating stations and transport schemes e) Defining and mapping key settlements f) Adjoining English regions g) Defining Rural Areas h) Consideration of the Well-being of Future Generations Act i) Summary of Study
Workshop Reports	3. Regional Workshop Report – North Wales 4. Regional Workshop Report – Mid & South West Wales 5. Regional Workshop Report – South East Wales 6. Rural Workshop Report – North Wales 7. Rural Workshop Report – Mid & South West Wales 8. Rural Workshop Report – South East Wales	j) Approach to stakeholder involvement k) Workshop arrangements and attendees l) Results of activities m) Summary of stakeholder feedback
SWOT² Reports	9. Regional SWOT Report 10. Rural SWOT Report	n) Approach to SWOT o) Stakeholder feedback p) Data validation q) SWOT analysis r) Role of the NDF in supporting and addressing the SWOTs, considering interrelationships and ways of working s) Summary of what the NDF should do to support / address SWOTs in regions and rural areas

² Strengths, Weaknesses, Opportunities and Threats (SWOT)

As a suite of documents, the Data and Definitions Report should be read alongside the associated Workshop and SWOT Reports for a comprehensive understanding of the results and findings of the research.

All outputs that comprise the suite of reports for the study provide context, purpose and cross reference to each other as appropriate.

In particular, the Data and Definitions Report clearly explains the approach to the study and reporting, providing an overview of the outputs together as required.

The study reports have been published on the National Development Framework website by the Welsh Government separately and alongside each other³.

1.3 This Report

Through stakeholder engagement and data gathering, the study helped to establish an evidence base of the strengths, weaknesses, opportunities and threats (SWOT) within each region (and common to those regions), as well as rural areas.

Two separate SWOT Reports have been prepared as follows:

1. Regional SWOT Report; and
2. Rural SWOT Report.

This Regional SWOT Report outlines the relevant results of stakeholder engagement, data verification and presents the SWOT and analysis around appropriate policy intervention areas and spatial scales (e.g. national, regional, local or community planning). It draws together a range of data and information for each of the three regions, presenting this in both tabular form and spatially.

This report considers what the NDF can do to support and address the SWOT. Importantly, as well as supporting the development of the Draft NDF, the outcomes of this research will also be used to support the development of SDPs, LDPs and joint-LDPs.

This Regional SWOT Report is presented in the following sections:

- Section 2 provides a high-level summary of the SWOT discussions across the three NDF Regions;
- Section 3 provides a SWOT analysis and considers issues pertinent to the emerging NDF;
- Section 4 provides recommendations for the NDF in light of the SWOT analysis; and
- Section 5 provides a summary with recommendations.

Appendix A presents an extended table of the SWOT issues raised within workshop discussions, to include those considered to be outside the NDF's remit.

³ <https://gov.wales/topics/planning/national-development-framework-for-wales/?lang=en>

2 Approach to SWOT

2.1 Overview

This section of the Report considers the results of the stakeholder workshops (see Workshop Report for full results), and identifies the Strengths, Weaknesses, Opportunities and Threats for the three Welsh Regions.

Section 3 provides a high-level summary of the SWOTs and includes a wide range of issues spanning all scales and policy areas.

As required by the commission, these issues have been sifted in order to provide a focus for the NDF and those policy areas considered to be appropriate for consideration within the NDF are identified as such in the SWOT results below. The criteria that have informed this sifting process include:

- a) Whether the issue / policy area is a planning consideration;
- b) Whether there is a spatial planning / policy intervention (e.g. is not a matter of funding / financial viability only);
- c) Whether the issue / policy area is best considered at the regional / national scale (also taking into account the results of the stakeholder workshop contributions on this topic); and
- d) Whether an initiative or process already exists that would address the issue (e.g. planning obligations).

To provide a consistent approach to classification, Strengths and Weaknesses apply to the current (baseline) position, whilst Opportunities and Threats apply to the future perspectives.

For each of the topics that are considered to be strengths or weaknesses (i.e. current issues), comments have been made as to where strengths or weaknesses are addressed, supported or delivered outside of planning.

To avoid unnecessary duplication and given the future perspective of opportunities and threats, similar commentary is not considered to be relevant and so has not been provided.

2.2 Data Validation

In addition to the SWOT analysis compiled through workshop events, this section of the report also considers how this analysis compares to the data collected as part of the wider commission⁴.

The commentary in the tables in Section 3 therefore identifies where data either contradicts or compliments the trends / views emerging from the SWOT. This is not specific or in detail, but the data collated can be found in the Study Report.

⁴ Data beyond the scope of the commission has not been collected to inform this validation process.

Where strengths, weaknesses, opportunities or threats associated with particular topics have not been specifically raised by stakeholders in one or more of the three regions, but where data exists to help clarify a position, a comment has been provided.

2.3 Ways of working

A key point raised during stakeholder discussions was the need for the NDF to reflect and drive the ways of working as advocated in the Well-being of Future Generations (Wales) Act 2015. Key issues for the NDF to take into account include:

Long term

The NDF should present a vision for the Wales we want, thinking long term. Priorities for growth, investment and strategic decision making around sectors and change need to be clearly set out. The spatial planning and policy position must drive a clear vision for change – articulating how policy interventions will ultimately impact on Wales and its regions (e.g. growth settlements, transport infrastructure and landscape changes). This will help address current needs and challenges in a way that safeguards the ability to meet long-term needs.

Prevent

The NDF should provide a clear direction as to the policy interventions that are needed to prevent current problems and those anticipated in the future from happening or getting worse. For example, the NDF should be clear as to the direction of travel for the decarbonisation agenda, related to spatial planning and policy development around associated themes including transport and energy.

Involve

The NDF should encourage involvement from stakeholders at an early stage in policy and project development, to help make sure that the planning system reflects the [sometimes different] needs of the population across Wales and its regions.

Collaborate

The NDF should encourage collaboration between key stakeholders (private and public sector), decision makers and delivery bodies at an early stage to help achieve the long-term policy objectives of the Welsh Government and its partners. This is important to helping address many of the non-planning barriers and needs, such as funding, viability and deliverability. This will also support the ability to create innovation and best practice sharing across sectors (e.g. funding and delivery models).

Integration

The NDF should make sure that policy areas are considered as a whole, acknowledging the importance of cross sector working and the interrelated nature of planning.

3 SWOT Results

This section outlines the results of the SWOT.

3.1.1 Summary of key issues

Table 2 provides a summary of the key issues raised that are applicable to all three NDF regions, including issues raised in the context of stakeholder discussions.

The Workshop Reports provide a full account of stakeholder feedback from the events held in each region.

A breakdown of issues specific to the North Wales, Mid & South West Wales and South East Wales regions are thus contained within the respective Workshop Reports for each region. The Study Report – Data and Definitions considers all stakeholder engagement undertaken as part of the research, as well as data collected and its associated analysis.

While these key issues may in some cases span SWOT categories (i.e. an opportunity may also be seen as a threat), they have been classified as a strength, weakness, opportunity or threat for the purposes of presentational clarity.

Table 2 Summary of Key Issues

Strengths		Weaknesses	
<ul style="list-style-type: none"> • Rural bus services • Recreation, active travel and PROW network • Tourism • Welsh Language • Industrial / employment sites • Steel industry • Agriculture • Biosciences • Professional services • Business enterprise and SMEs • Quality of life • Natural/Built env • Sports & Ent. • Transport network 	<ul style="list-style-type: none"> • Community spirit • Diversity of people and culture • Housing sites and prices • Digital connectivity • Universities and colleges • Cross-border connections to England, Ireland and beyond • Energy sector • Minerals • Ports and Airports • Aerospace sector • Retail sector 	<ul style="list-style-type: none"> • Housing vs need • Public transport • Land availability and viability • Govt funding • Fuel poverty • Energy efficiency • Deprivation • Health infra • Balance of communities • Out-migration • Welsh language • Underselling • Connectivity • Agriculture • Cross Border competition • HE reliance • Online retail • Jobs – choice, pay, seasonal • Planning system 	<ul style="list-style-type: none"> • Night time economy • Skills base / apprenticeships • Limited sites • Empty sites • Distance / out-commuting • Second homes • AQ / traffic • Environment as a blocker • N-S links • Congestion • Development in flood risk areas • Minerals and coal extraction • Waste management • LA Land availability • Politics in planning

Opportunities		Threats	
<ul style="list-style-type: none"> • Welsh language • Private and public housing provision • Community engagement in development • Affordable housing and public land • Sustainable / green housing • New jobs and employment opportunities to facilitate growth • Port accessibility • Planning obligations • Self-fund / build • Tourism / leisure • Digital economy • Environment and healthy lifestyles • Welsh schools • Lower land values • Quality brands 	<ul style="list-style-type: none"> • Education, skills & apprenticeships • City Deals • Energy/ Renewables • SME/Social enterprises • Repurposed town centres / places • Government services • Modal shift / public transport • SuDS & Enviro-management • PDL/Brownfield • Big data • Minerals/waste • Circular economy • Green infrastructure • Marine planning • Heritage assets • Severn toll gone • Aging population 	<ul style="list-style-type: none"> • Retaining skills • Welsh language / cultural heritage • Population trends & service demand • Agriculture • Affordable homes • Aging population • Tourism • Young people • Active travel / PRoW • Second homes • Skills / staff • Automation • Job quality/choice • Brexit • Govt funding 	<ul style="list-style-type: none"> • Stalled sites / viability • Environment impacts • Online services • Flood risk and water quality • Climate change • Transport network • Tourism and the environment • Agriculture • Waste • Land constraints • Connectivity • Accountability in decision making

3.1.2 SWOT issues and the NDF

Key issues that are considered to be pertinent to the role of the NDF are set out in Table 3 to Table 6 below. Each issue references the NDF region within which it was raised, alongside where the data collected validates or contradicts the specific issue. A summary comment is also made about how the issue ought to be addressed and/or delivered outside the remit of spatial planning.

An extended summary and deeper analysis of these issues with respect to the role of the NDF is contained within Section 3.2; this includes details of including of the spatial scale, policy focus, infrastructure requirements for each issue raised.

Appendix A presents an extended table of the SWOT issues raised within workshop discussions, to include those considered to be outside the remit of the NDF.

Table 3 SWOT Issues and the NDF - Strengths

Strengths

Strength	North Wales	Mid & West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of Planning
Recreation, active travel and Public Rights of Way network	Y	Y		Data shows that the South East Wales region also has an active travel and PRoW network	Y	Maintenance and management.
Tourism	Y	Y		Data shows tourism is also an important sector in South East Wales	Y	National and local promotion and funding.
Welsh Language	Y			Data shows that Mid & West Wales also has a significant population of Welsh speakers	Y	National and local promotion and funding.
Industry and employment sites	Y		Y	Data shows that the Mid Wales Region also contains strategic employment sites	Y	Fiscal incentives and skills development.
Agricultural development		Y	Y	Data shows that the agricultural sector is also a strength for the North Wales economy	Y	Funding (e.g. EU), land management and sector-specific programmes and government policy (e.g. skills).
Quality and protection of the Natural Environment and environmental destinations including landscape and water (including the National Park(s), AONB's and SLA's)	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Maintenance and land / resource management.
Digital connectivity	Y			Data shows that digital connectivity is poor across Wales particularly in rural areas	Y	Sector-specific programmes and strategies (e.g. high-speed broadband roll out).
Cross-border connections including to England and Ireland, as well as international	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Government policy, regional partnerships and collaboration.

Energy sector including low carbon economy (e.g. Wylfa and opportunities for renewables)	Y	Y		Further study may help to clarify or support this across other regions.	Y	Government policy, sector-specific programmes and strategies (e.g. targets and skills).
Minerals and extraction		Y		Data shows there is also a significant number of minerals sites in South East Wales	Y	Government policy, sector-specific programmes, land and resource management.
NRW Area Statements	Y			Further study may help to clarify or support this across other regions.	Y	Conservation and enhancement at regional level.
Ports (e.g. Holyhead, Cardiff, Newport)	Y			Data shows that there is important port infrastructure in all regions	Y	Sector-specific programmes and strategies (e.g. trade and skills).
Airports and aerospace			Y	There is also strategic air transport infrastructure in North Wales	Y	Tourism promotion at national and regional levels and sector-specific programmes and strategies (e.g. trade and skills).
Transport network (e.g. roads and railways)	Y		Y	Data shows that there is also trunk road and rail connectivity in Mid & South West Wales, but it is sparser compared to the other two regions	Y	Government policy (e.g. sustainable transport hierarchy) and operation / maintenance.
Heritage assets and historic landscape	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Land and resource management and maintenance.

Table 4 SWOT Issues and the NDF - Weaknesses

Weaknesses

Weakness	North Wales	Mid & West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of Planning
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Land availability and viability	Y			Further study may help to clarify or support this across other regions.	Y	Land availability, management and market drivers.
Digital and telecoms connectivity, especially in rural areas	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Government policy and service provider investment programmes and strategies.
Agricultural – scale of farms (Co-op)	Y			Further study may help to clarify or support this across other regions.	Y	Sector-specific strategies in relation to viability and funding.
Limited employment choices and reliance on low paid seasonal jobs (e.g. tourism)		Y		Further study may help to clarify or support this across other regions.	Y	Market forces and sector-specific programmes and strategies (e.g. skills and financial incentives).
Limited large industrial sites			Y	Further study may help to clarify or support this across other regions.	Y	Market forces, sector specific programmes and strategies (e.g. financial incentives).
Distance to markets and out-commuting		Y	Y	Further study may help to clarify or support this across other regions.	Y	Market forces and economic opportunity.
Welsh language and culture dilution		Y		Further study may help to clarify or support this across other regions.	Y	National and local promotion and funding. Government strategies (e.g. Welsh language growth).
Air quality / increased traffic	Y			Data shows that poor air quality is also an issue in areas of South East Wales	Y	Market forces, lack of alternatives (e.g. public transport) and need for future infrastructure investment (e.g. EV charging).
Over emphasis on environment when considering development	Y			Further study may help to clarify or support this across other regions.	Y	Role of statutory bodies in the decision-making process. Ability to consult widely early in the development process.
Public transport services and impact on isolation and social exclusion	Y		Y	Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. sustainable transport hierarchy) and funding of services, operation / maintenance.
Reliance on the car and difficulties changing behaviours to sustainable travel		Y	Y	Further study may help to clarify or support this across other regions.	Y	Market forces, lack of alternatives (e.g. public transport) and need for future infrastructure investment (e.g. EV charging).

Lack of electric vehicle infrastructure			Y	Further study may help to clarify or support this across other regions.	Y	Market forces and lack of government strategy on the provision of infrastructure.
Transport links, especially North – South	Y	Y		Data shows that links between North and South Wales are also limited from South East Wales	Y	Government policy (e.g. transport hierarchy, funding and priorities), maintenance and management
Air travel	Y			Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. transport hierarchy, funding, targets and climate change).
Grid connectivity, energy storage and capacity		Y	Y	Further study may help to clarify or support this across other regions.	Y	Market processes (e.g. demand led system) and age of infrastructure.
Development in flood risk areas and resistance to SuDS		Y		Data suggests that flood risk is an issue in coastal areas of all three regions	Y	Government policy and guidance and application during the decision-making process.
Air quality (e.g. impact of M4)			Y	Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. transport hierarchy, funding, targets and climate change).
Land availability with holdings by Local Authorities			Y	Further study may help to clarify or support this across other regions.	Y	Governance and approach to asset management.

Table 5 SWOT Issues and the NDF - Opportunities

Opportunities

Opportunities	North Wales	Mid & West Wales	South East Wales	Data Validation	NDF Role
Port accessibility, imports and employment opportunities	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Access / connectivity to local facilities / focus development in areas reducing the need to travel	Y			Further study may help to clarify or support this across other regions.	Y

Tourism and scaling up			Y	Further study may help to clarify or support this across other regions.	Y
Digital connectivity / home working	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Energy / Low Carbon Sectors / Micro-generation / community schemes	Y		Y	Further study may help to clarify or support this across other regions.	Y
Greater use of renewables (e.g. solar, wind, tidal)	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Electricity grid connectivity	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Digital / high value jobs	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
SME growth / incubators	Y		Y	Further study may help to clarify or support this across other regions.	Y
Repurposed town centres / empty spaces / future of retail	Y			Data shows that there are also smaller retail service centres scattered across Mid and South West Wales	Y
Lengthening tourism season	Y			Further study may help to clarify or support this across other regions.	Y
Agri-tourism / agricultural produce	Y	Y		Further study may help to clarify or support this across other regions.	Y
Modal shift / better public transport	Y		Y	Data suggests this is also an opportunity area in Mid & West Wales.	Y
Electric vehicle charging infrastructure	Y		Y	Further study may help to clarify or support this across other regions.	Y
Sustainable drainage as part of new development	Y		Y	Further study may help to clarify or support this across other regions.	Y

NRW Area Statements	Y			Further study may help to clarify or support this across other regions.	Y
Building capacity and standards in the National Park	Y			Further study may help to clarify or support this across other regions.	Y
Planning for climate change and decarbonisation	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Shoreline Management Plans (and strategic plans for water management / defences)	Y		Y	Further study may help to clarify or support this across other regions.	Y
Minerals and waste planning at regional scale	Y			Further study may help to clarify or support this across other regions.	Y
NDF and Marine Plan, including support for marine industries	Y	Y		Further study may help to clarify or support this across other regions.	Y
Encouraging new uses for heritage assets including listed buildings	Y	Y		Data shows that there is also a significant number of designated heritage assets in the South East Wales region	Y

Table 6 - SWOT Issues and the NDF Threats

Threats

Threats	North Wales	Mid & West Wales	South East Wales	Data Validation	NDF Role
New pylons and impact on environment	Y			Further study may help to clarify or support this across other regions.	Y
Flood risk and development	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Extreme weather / climate change	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y

Resilience of transport network	Y			Data shows that Wales is most well-connected by road	Y
Impact of tourism on the natural environment	Y			Further study may help to clarify or support this across other regions.	Y
Impact of agriculture on the natural environment		Y		Further study may help to clarify or support this across other regions.	Y
Environmental constraints impacting on availability of land and capacity to develop		Y		Data shows that all regions have a high number of nationally and regionally significant designated sites	Y
Grid connectivity limiting renewable energy potential		Y		Further study may help to clarify or support this across other regions.	Y

4 Role of the NDF

4.1 Approach

Many issues spanning different policy areas have been identified as either strengths, weaknesses, opportunities or threats across the three Welsh regions. To help focus on what the NDF can do to help address, support or consider those issues of most relevance, groups of issues have been grouped in themes.

Those themes are analysed in Table 7.

Firstly, each theme is considered with a summary of its strengths, weaknesses, opportunities or threats across the three Welsh regions.

Then each theme considers the appropriate spatial area / scale, policy focus, infrastructure requirements and links to other policy areas / objectives.

The analysis considers each theme and what the NDF could do to maximise / promote its strengths and opportunities and reduce / address its weaknesses and threats.

This has involved both distilling stakeholder views and applying the authors' professional judgement from experience of the Welsh and other planning systems.

It should be acknowledged that whilst particular themes and issues have been sourced to stakeholder feedback pertinent to particular regions, some of the points can be considered to be Wales wide. That is drawn out as part of the recommendations made in section 4 of this report.

It is important to acknowledge that this section is a factual and succinct account of the SWOT analysis, its results and Arup's view on the role of the NDF is supporting or addressing the key issues raised across Wales and within each region as appropriate.

4.2 Interrelationships

As set out above, each theme considers links to other policy areas / objectives.

A key consideration for the NDF and policy development is the interrelated nature of policy areas and themes. This approach has been taken in the revision of PPW10, where themes around placemaking have replaced the traditional topic / sectoral structure of national policy.

The need to work in an integrated way is advocated in section 2.3 of this report. With the Well-being of Future Generations (Wales) Act 2015 there is a now a requirement for the Welsh Government and other public bodies to consider the integration between economic, social, cultural and environmental pillars of sustainable development.

As part of the NDF, there is an opportunity to make an impact on a range of policy themes through single or multiple interventions.

For example, through identifying the opportunity for renewable energy technologies to that meets the needs of the present without compromising the ability of future generations to meet their own needs, the NDF would:

- a) Support the delivery of renewable energy to meet national targets;
- b) Contribute to carbon reduction;
- c) Support and generate employment opportunities in a growth sector;
- d) Support the development of skills and training in the construction industry and its supply chain;
- e) Benefit local employers and communities through local ownership / energy generation schemes during operation and benefits during construction;
- f) Enable strategic discussions with key service providers around the provision of infrastructure e.g. energy connections;
- g) Indirectly improve the grid network, which brings wider benefits e.g. enabling commercial / industrial development and the roll out of Electric Vehicle infrastructure (and decarbonising transport);
- h) Direct SPDs to refine suitable areas for development;
- i) Outline and recognise an element of change with environmental impacts e.g. landscape effects resulting from development.

This serves to demonstrate where policy support in a single area must take into account the interrelated policy impacts (e.g. impacts on other policy areas) as well as the wider benefits and effects (e.g. major infrastructure and landscape change).

Table 7 identifies where the NDF should consider these potential interferences and relationships where appropriate, such as the need for tourism and recreation issues needing to consider transport in terms of access and connectivity, as well as digital infrastructure to help ensure policy development is integrated in its approach.

Table 7 Analysis and Results

Analysis / Results

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Tourism & Recreation	<p>Tourism, recreation and PRoW recognised as a strength in the North Wales and Mid & South West Wales Regions with specific opportunities in relation to agri-tourism and scaling up tourism assets, particularly in South East Wales.</p> <p>The potential impact of tourism and recreation on the natural environment is considered a threat for the North Wales region, particularly given the number of ‘land based’ attractions within the green economy.</p>	Regional – reflecting the differing tourism and recreational offer across Wales.	Facilitating and supporting year-round tourism activities and ensuring a balance between the economic benefits and impacts on the environment.	N/A	<p>Transport – access and connectivity</p> <p>Digital infrastructure – connectivity</p>	<p>The NDF could direct SDPs to identify broad tourism areas to be supported. For North Wales this could focus on natural environmental assets and, along with Mid & South West Wales be a means of supporting or creating agricultural diversification and/or transition with the overarching objective of supporting sustainable development. South East Wales is likely to retain its current destination tourism focus.</p> <p>It is not envisaged that sites need to be identified within the NDF and PPW provides the appropriate national level planning policy. However, tourism could be one sector of the economy that the NDF could usefully provide high-level steer on. SDPs could identify areas or sites for future development / growth. They may wish to prioritise certain forms of tourism or make high-level ‘zones’ or allocations where tourism interests run across administrative boundaries. This might include trying to ‘spread’ or otherwise emphasise the tourism benefits of national parks or coastal stretches.</p>
Welsh Language	<p>Welsh Language is considered to be a strength of the North Wales region, but concerns were raised around the impact of population changes.</p> <p>Welsh language and culture dilution is considered to be a weakness in the Mid &</p>	National – aligned to the setting of targets across Wales.	Supporting developments that would make a positive contribution to the Welsh	N/A	Housing Employment	<p>This is a policy area that forms a thread throughout government policy. Planning also has an important role to play.</p> <p>The NDF could identify broad areas where the Welsh language is prevalent, in order to help promote and protect the language /</p>

	South West Wales Region, whilst there are cultural tensions in the South East Wales Region.		language and culture.			<p>culture moving forward. This would give a ‘hook’ for SDP and LDP policy-making.</p> <p>As the context and needs of the Welsh Language and the communities embracing it varies from authority to authority (and in some cases from settlement to settlement) lower tiers of policy making are better placed to co-ordinate efforts.</p> <p>Otherwise not a spatial planning theme and covered in PPW (strategic and spatial choices, active and social places, distinctive and natural places). PPW does not ‘allocate’ <i>Enabling the Welsh Language to thrive</i> within the ‘Productive & Enterprising’ wellbeing goal; it may be that in NW this area could be given further consideration to explore the creation of an economic impetus around the Welsh Language.</p>
Employment	<p>Industry and employment sites are identified as a strength in North East and South East Wales with strong cross-border links. However, the lack of large industrial sites is a weakness in South East Wales.</p> <p>The ports are identified as a specific strength in the North and South East. Port accessibility, imports and employment opportunities are seen as opportunities across all three Welsh regions.</p> <p>Limited employment choices and reliance on seasonal or low paid jobs is a weakness in the Mid & South West Wales Region. Specific opportunities are identified for the digital economy, SME growth and high value jobs. There is a further opportunity to repurpose and support retail development.</p>	Regional – reflecting the sector foci at the regional level and potential opportunities in regional centres.	<p>Employment Sites – identify and support regionally or nationally important sites.</p> <p>Sectors – identifying key sectors (where appropriate) and supporting their development.</p> <p>Commercial / Retail – identify and support regionally or nationally important sites / centres.</p>	<p>Site based – ensuring identified sites are investor ready.</p> <p>Transport – ensuring connectivity and accessibility.</p> <p>Digital – modern infrastructure ready to support activities.</p>	<p>Transport and Ports</p> <p>Digital infrastructure</p>	<p>Planning has the opportunity to influence the location of new employment sites and encourage regeneration. It thus sits alongside broader government focus on employment.</p> <p>The NDF could identify existing and future strategic sites of national significance (in an attempt to provide clarity and certainty over (reuse), as well as outlining high-level spatial improvements needed (such as network improvements or soft infrastructure) to encourage growth and investment.</p> <p>In turn, Strategic Development Plans could champion the delivery of those national sites and also establish a sub-national set of priority sites and / or key sectors or associated investor opportunities. Careful consideration will need to be given to the sectors chosen to avoid inter- and intra-regional cannibalisation.</p> <p>The SWOT evidence gathered through this study gives a good flavour of the regional variations.</p>

<p>Housing</p>	<p>All groups, in various forms, agreed that planning had a role in developing communities through positive planning and promoting sufficient housing in the right locations. This included ensuring sufficient supporting infrastructure for housing and appropriate affordable housing provision. The overall feeling was that housing spanned the regional and local planning scales, with the Mid & South West Wales Region more locally-focused than the other regions.</p> <p>This area was referred to as much tangentially as directly. For example, discussions around stemming the out migration of young people came back to the availability and affordability of housing. This was a national challenge. Similarly, discussions around wellbeing and health referenced the quality of housing and mix of tenures. Negative population growth was referred to in both North Wales and Mid & South West Wales Regions.</p> <p>Both North Wales and Mid & South West Wales Regions highlighted the effect that new housing could have (positively and negatively) on the Welsh Language.</p> <p>The Mid & South West Wales Region highlighted a concern around under-occupation of housing.</p>	<p>Regional/Local – based on local assessments of housing need and the importance of joining up across housing market areas.</p>	<p>Population growth – agree on the level of demand to be catered for.</p> <p>Housing need – agree on the net increase in units, and the distribution of that increase.</p> <p>Range – define the need in terms of tenure and size (bedrooms).</p> <p>Affordability – define the level and nature of affordable housing need (key worker, supported, shared ownership, social rented, intermediate etc.)</p>	<p>Hard – sites with road, energy, water, sewerage and communications and digital connectivity.</p> <p>Soft – schools, healthcare, open and play spaces,</p>	<p>Infrastructure provision (hard and soft), Welsh Language, Employment, Health and wellbeing, Transport</p>	<p>Housing is the most scrutinised area of plan-making. Challenges focus around the appropriate number of new homes to be planned for and where they should be built. Whether and to what extent the NDF leads or informs this process is subjective.</p> <p>There is considerable benefit in ‘front loading’ housing need estimation into a national exercise; it only needs to be done once, has a strategic overview of growth and avoids local political controversy. This could be done nationally and/or regionally as either a single or a stepped exercise.</p> <p>However, there was little overall stakeholder support for the NDF to lead this exercise. This did not vary regionally; likely a combination of wanting to retain local control of this issue and uncertainty over how it might be completed (such are the normative assumptions involved) and who would emerge better or worse off.</p> <p>The consultants believe the benefits of a national approach outweigh the lack of stakeholder buy-in at this stage. A pragmatic approach could be a ‘stepped’ approach whereby the NDF sets the direction on national and regional need for housing, which in turn sets out the starting point for SDPs. Such an approach would need to be tested with stakeholders. The alternative would be to continue to take growth decisions at a local level, but with careful balancing of housing and employment strategy at a strategic level.</p> <p>In parallel with PPW, the NDF can promote sustainable housing choices/technologies such as off-site manufacture.</p>
<p>Transport</p>	<p>Transport is identified as a strength in North and South East Wales, particularly with the A55, M4 and railway network serving key centres and communities with strong cross border links to England.</p> <p>Increased traffic is considered to be a threat</p>	<p>National and regional – reflecting the key connections within and</p>	<p>Identifying and facilitating key connections providing suitable accessibility to</p>	<p>Transport – ensuring connectivity and accessibility.</p>	<p>Housing Employment Tourism Commercial and retail</p>	<p>Transport, and the investment in related infrastructure is one of the major ‘levers’ that government can operate to help influence places. Planning must both guide and react to maximise benefits and ensure complementarity as part of a shared vision.</p>

	<p>in North Wales with specific reference to air quality. Electric Vehicle charging infrastructure is a weakness and an opportunity.</p> <p>Reliance on the car and difficulties changing behaviours to sustainable travel is a weakness. The resilience of the transport network is considered a threat, particularly in North Wales with specific reference to the A55.</p> <p>Public transport services are considered to be a weakness and opportunity across Wales, with concerns about social isolation / inclusion.</p> <p>Access / connectivity to local facilities and focusing development in areas reducing the need to travel is an opportunity, particularly to North Wales.</p> <p>Distance to markets and out-commuting is a concern, with North-South connections a particular weakness.</p> <p>Access to air travel and aerospace is a weakness in North Wales but strength in South East Wales.</p>	<p>between the regions and beyond.</p>	<p>support development and the movement of people and goods.</p>			<p>The NDF could be core in identifying key national and regional transport infrastructure needs and priorities, in turn reflecting the National Transport Finance Plan. The ongoing challenges around national North-South connectivity is an area for consideration.</p> <p>The NDF can also try to support a national view on the balance of effort between physical and virtual connectivity and the prioritisation of both need and opportunity. It may even develop high-level zones for such priorities.</p> <p>Strategic Development Plans could identify key regional projects. These would reflect any zonal or spatial focus in the NDF. In reality, this could be a combination of top-down and bottom-up forces to try and shape the core needs for regions, such as sustainable and viable public (rural) transport for NW and MWW, encouraging modal shift nationally and creating strategic narratives for ‘pipeline’ schemes.</p>
<p>Energy</p>	<p>The energy and renewables industry is considered a strength for the North Wales and Mid & South West Wales Region, including its low carbon sectors and opportunities for micro-generation and community schemes.</p> <p>A threat for the North Wales region is the impact that new pylons could have on the landscape and the general impact of energy related development on the environment.</p> <p>Grid connectivity, energy storage and capacity are weaknesses, particularly in the Mid & South West Wales and South East Wales Regions. This limits development potential in the Mid & South West Wales Region. Grid connectivity is also an opportunity across all three Welsh regions. Greater use of renewables is an opportunity across Wales.</p>	<p>National and regional – reflecting the strategic identification of targets and projects as well as the geography specific skills, accessibility and environmental considerations needed.</p>	<p>Supporting the decarbonisation agenda and the need to provide sources of energy to support development and sustainable communities / businesses.</p>	<p>Grid connections Transport – ensuring connectivity and accessibility.</p>	<p>Carbon and climate change Transport</p>	<p>Energy is crucial to sustainable development and is also a growth industry of higher value.</p> <p>The NDF could identify and support areas and energy types around existing and new strategic development locations. Stakeholders repeatedly cited TAN8 (renewable energy, and its identification of strategic areas for wind energy) as an example of how national policy can provide spatial certainty with granularity around energy types. The NDF should explore whether this approach could be extended.</p> <p>Strategic Development Plans could identify key regional projects based on the NDF framework, to help ensure a diverse and competitive position is maintained and to ensure balance between (for example) population and/or employment growth and</p>

						<p>energy provision. As with the current TAN8 designations, it could be entirely acceptable for an SDP to refine the NDF boundary or zone based on the SDP evidence gathering, consultation and analysis activities.</p> <p>Energy developments can be contentious, much like infrastructure or development generally, and the NDF and SDP can together provide a national debate on ‘what goes where’. In doing so, it will be important to consider how LDPs and communities engage in this process.</p> <p>Furthermore, the NDF should provide policy position on which to lobby electricity network operators (e.g. National Grid / DNOs) in planning to meet future demand and help to meet Welsh based targets for renewables as an example.</p>
<p>Water and Flooding</p>	<p>Climate change and extreme weather as well as development in flood risk areas is a threat and opportunity across Wales. Flood risk and extreme weather / climate change is considered a treat for development across Wales. Planning for climate change, producing shoreline management plans and sustainable drainage as part of new development is seen as an opportunity, particularly in North and South East Wales. Resistance to SuDS is a particular weakness in the Mid & South West Wales Region.</p> <p>A link between the NDF and marine planning is also considered an opportunity.</p>	<p>Regional – reflecting different geographic conditions, threats and needs</p>	<p>Taking into account climate change and extreme weather risks when locating development</p> <p>Supporting approaches to sustainable drainage as part of new development</p>	<p>Flood defences</p> <p>Sustainable drainage</p>	<p>Climate change</p>	<p>Water and flooding, through Natural Resources Wales (NRW), are a national consideration. NRW operates a sub-national model to promote local knowledge and interaction. The ‘a-spatial’ elements of this theme are covered in PPW.</p> <p>The NDF could form part of a ‘do it once, do it well’ philosophy to co-ordinate Welsh Government and NRW to produce a national evidence base and set of foci or priorities. The aim would be to create efficiencies and avoid duplication for SDPs and LDPs although both would need to interpret the national evidence in their regional or local context.</p> <p>Based on the above, the NDF could identify and support the risks and needs of shoreline management plans and marine plans and join up the river basin management planning and land use planning processes.</p> <p>Strategic Development Plans could identify key regional projects, again working with NRW to define critical infrastructure.</p>

<p>Agriculture / Rural Economy</p>	<p>Agricultural development is a strength in Mid & South West Wales and South East Wales Regions.</p> <p>The scale of farms and lack of co-ops is considered a weakness in North Wales. The agricultural sector and agri-tourism is considered an opportunity, particularly in North Wales.</p> <p>Impact of the agricultural industry on the environment is a particular threat for the Mid & South West Wales Region.</p>	<p>Regional – reflecting different agricultural industries, skills, needs and quality of land / resources</p>	<p>Supporting the agricultural sector and diversification</p>	<p>N/A</p>	<p>Economy</p>	<p>Agriculture is a key sector for Wales and is considered a strength across Wales. However, the challenges faced vary. Planning provides multiple support points to agriculture, the main ones referred to by stakeholders were the range of permitted development rights and the interplay between agricultural land and the workers needed to manage and support it.</p> <p>The NDF could identify where agricultural industry is prevalent and where consideration needs to be given to supporting the sector and / or its diversification.</p> <p>The SDPs can then take these broad areas and, as part of their own evidence gathering and analysis, determine what regional and sub-regional actions may be required. The SDPs will have to face some ‘tough questions’ around economic growth as agriculture is increasingly land-intensive but labour-extensive.</p>
<p>Minerals and Waste</p>	<p>Minerals and the extraction industry is a strength in the Mid & South West Wales Region.</p> <p>North Wales considers there to be an opportunity for minerals and waste planning at the regional scale.</p>	<p>Regional – the level at which there is support for planning and coordination of minerals and waste policy and development</p>	<p>Supporting and coordinating minerals and waste policy and development</p>	<p>N/A</p>	<p>Economy</p>	<p>Minerals and Waste are traditionally an area of focus for strategic planning. Whilst most planning authorities (all but national parks) have unitary status, existing practices show cross-authority working and strategic planning.</p> <p>The NDF could identify strategic centres of minerals and waste development and planned expansion areas. As part of this the NDF could also undertake a national ‘balancing’ exercise to understand total and net demands. This should dovetail with the existing framework for understanding the volume, nature and location of minerals being won and the remaining permissions and reserves.</p> <p>In turn, SDPs could identify and manage key regional projects and collaborative initiatives. Minerals planning policy importantly has to consider marine aggregates also. SDPs can be the vehicles to interpret MTANs impact on spatial</p>

						planning at the site level.
Natural Environment	<p>The quality of the natural environment and environmental destinations (e.g. National Parks, AONBs and SLAs) is a strength across Wales.</p> <p>In the North Wales and Mid & South West Wales Regions there are concerns about environmental constraints impacting on the availability of land and capacity to develop. There is an opportunity is to build capacity and standards in the Snowdonia National Park.</p> <p>NRW Area Statements are considered to be an opportunity, as is building capacity and standards in the National Parks – especially in North Wales. Minerals and waste planning at the regional level is also considered to an opportunity.</p> <p>The impact of tourism- and energy-related development is considered a threat.</p>	<p>National, regional and local – reflecting the different scales of designations / governance / maintenance / planning controls of protected areas.</p>	<p>Protecting and enhancing the natural environment, balanced against other social, cultural and economic considerations.</p>	<p>Transport – access to areas of recreation and tourism</p>	<p>Recreation and tourism Health and well-being Transport</p>	<p>As with the ‘water and flooding’ theme, the NDF could be a catalyst for a ‘do it once, do it well’ partnership with NRW to build a national picture of environmental information.</p> <p>In this way, the NDF could identify protected and high value areas, complementing the planning policy at the national level as directed by PPW. Post-Brexit, the NDF could be core to the transposition of the various Natura 2000 designations.</p> <p>This could also identify and include key natural resource infrastructure (e.g. Wales Coast Path, reservoirs etc.).</p> <p>The NDF should also have a role in supporting the future of the forestry sector in Wales and recognising the impact this could have on the natural environment more broadly.</p> <p>In turn, SDPs could consider the natural environment at the regional scale and make more of a ‘joined up’ picture between the natural environment, sustainable growth, economic opportunities (such as eco-tourism) and the role of the natural environment in health and climate change topics.</p>
Land and the Built Environment	<p>Heritage assets and the historic landscape is considered a strength across Wales.</p> <p>Encouraging new uses for heritage assets including listed buildings is seen as an opportunity, particularly in North Wales.</p> <p>Land availability and viability is considered to be a weakness, particularly in North Wales. In South East Wales there is a concern about the level of land held by Local Authorities.</p>	<p>Regional – reflecting the different assets and land availability / viability issues</p>	<p>Making land that is viable for development available</p> <p>Protecting and bringing back into use heritage assets including listed buildings</p>	<p>N/A</p>	<p>Economy / Employment Tourism Housing</p>	<p>Cadw operates national and sub-nationally to manage the historic environment and could be involved in another ‘do it well, do it once’ engagement around the NDF.</p> <p>The NDF could identify nationally-important assets to be protected and supported. Whilst there is regional variation in the nature, number and type of sites and assets, the role for the NDF is likely to be universal in its scope and applicability.</p> <p>In terms of sustainable growth, it could identify and support strategic development sites. The NDF could give a steer on the</p>

						<p>balance between areas of need and opportunity, such as the focus on area in post-industrial transition, areas focused on maintaining an industrial base and areas focused on new and emerging industries. SDPs could build on this NDF steer and work out which of their broad areas and strategic sites could fit with key regional initiatives and/or projects.</p>
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5 Summary

5.1 Overview

An analysis of the identified strengths, weaknesses, opportunities and threats considered across Wales helps identify what the NDF could do to protect, facilitate and enhance development.

Table 2 sets out the key issues raised by stakeholders during workshop events across Wales and Table 3, Table 4, Table 5 and Table 6 consider where those issues are pertinent to each region, where data collected helps verify the stakeholder views, and whether an issue can be supported or addressed through the NDF or if there is a function for an issue to be addressed or delivered outside of the planning system.

Table 7 provides a full analysis of the SWOT and outlines Arup's views of the role of the NDF when taking into account the stakeholder feedback, data validation exercise and analysis.

The final sections of this report below help to outline where and how the NDF might best support policy development across Wales and within each of the three Welsh regions, as well as benefit the planning system now and in the longer term by identifying the issues and spatial areas NDF policies should focus on.

This section summarises a factual and concise account of Arup's views based on the evidence base collected for the NDF.

As is advocated by the Welsh Government, this research has covered all Wales and a wide range of potential policy areas. As such this study and its recommendations are intended to be high-level and will help inform NDF policy development, as well as provide evidence and support policy development for all levels including regional planning and Strategic Development Plans (SDPs) across Wales.

It is important to note that where recommendations relate to the role of the NDF in terms of it directing regional planning through SDPs, there is also another key function to consider in terms of joint LDPs and the need for LPAs to work together in a collaborative approach (as advocated by the Well-being of Future Generations Act as well as the Planning Act.

Other thematic areas (those not listed below) are considered to be either not relevant for the NDF, not a spatial planning theme and/or are covered in PPW.

Recommendations are thus made as follows:

- a) What the NDF could identify;
- b) What issues and spatial areas the NDF should focus on; and
- c) How the NDF should support policy development.

5.2 What the NDF could identify

In some cases, there is not a spatial planning theme to help address an identified strength, weaknesses, opportunity or threat – and instead PPW is the appropriate place to set national planning policy.

It is recommended that the NDF considers the following eleven prospects at a national level:

The NDF could identify...

1. ... broad areas where the Welsh language is prevalent, in order to help promote and protect the language.
2. ... the direction for sustainable development, including the national and regional need for new housing.
3. ... existing and future strategic employment sites and any improvements needed to encourage growth / investment.
4. ... key national and regional transport infrastructure and priorities, reflecting the National Transport Finance Plan.
5. ... existing and new energy developments alongside supporting the associated infrastructure essential to delivery.
6. ... strategic centres of minerals and waste development and planned expansion areas.
7. ... the risks and needs of shoreline management plans and marine plans.
8. ... where agricultural industry is prevalent and where consideration needs to be given to supporting the sector and its diversification
9. ... protected and high value environmental areas, complementing the planning policy at the national level as directed by PPW.
10. ... nationally important heritage assets to be protected and supported.
11. ... strategic development sites to assist bringing forward available and viable land.

5.3 What issues and spatial areas the NDF should focus on

When considering the more specific themes and spatial areas, it is clear that the NDF needs to acknowledge a wide range of interrelated key issues taking into account regional variations.

Whilst advocating NDF policy development that would address and deliver the above eleven prospects, the NDF should create a framework for decisions at the national and regional scale, as well as direct policy areas for SDPs, joint-LDPs and LPAs to prioritise as part of an integrated planning policy framework.

The issues and spatial areas the NDF should focus on should be considered together, acknowledging the many interrelationships outlined in previous sections of this report. However, for presentational purposes, policy themes are set out in turn below alongside a summarised narrative of what the NDF should focus on within that policy area.

The NDF should focus on...

a) Tourism & Recreation

- Recognise tourism as an important sector within the Welsh economy
- For North Wales, focus on natural environmental assets
- For North and Mid & South West Wales be a means of supporting or creating agricultural diversification and/or transition
- Retain South East Wales as a tourist destination
- Direct SDPs to identify broad tourism areas with sites for future development
- Prioritise certain forms of tourism or make high-level 'zones' or allocations where tourism interests run across administrative boundaries w.g. national parks

b) Welsh Language

- Identify broad areas where the Welsh language is prevalent, to help promote and protect the language / culture and inform SDP and LDP policy-making
- In North Wales recognise an economic impetus around Welsh Language

c) Employment

- Identify existing and future strategic sites of national significance
- Outline high-level spatial improvements needed
- Direct SDPs to help deliver national sites and establish a sub-national set of priority sites and / or key sectors or associated investor opportunities
- Avoid inter- and intra-regional conflicts in competition

d) Housing

- Consider front loading need estimation with a national exercise and/or regionally with a stepped exercise to set the direction for sustainable development
- Promote sustainable housing choices/technologies such as off-site manufacture

e) Transport

- Identify key national and regional transport infrastructure needs and priorities
- Encourage modal shift nationally with 'pipeline' schemes
- Address North-South connectivity
- Develop high-level zones to prioritise physical and virtual connectivity
- Direct SDPs to identify key regional projects
- Support sustainable and viable public and rural transport for North Wales and Mid & South West Wales

f) Energy

- Identify and support strategic development areas focused on energy types
- Provide a framework to identify strategic areas for different energy types
- Direct SDPs to identify key regional projects
- Lobby electricity network operators to meet future demand and help to meet Welsh based targets for renewables

The NDF should focus on...

g) Water and Flooding

- Identify and support the risks and needs of shoreline management plans and marine plans and join up the river basin management planning and land use planning processes
- Direct SDPs to identify key regional projects, working with NRW to define critical infrastructure (both existing and future needs)

h) Agriculture / Rural Economy

- Identify where agricultural industry is prevalent and where consideration needs to be given to supporting the sector and / or its diversification.
- Direct SDPs to identify broad areas and determine what regional and sub-regional actions may be required

i) Minerals and Waste

- Identify strategic centres of minerals and waste development and planned expansion areas
- Undertake a national 'balancing' exercise to understand total and net demands
- Direct SDPs to identify and manage key regional projects and initiatives

j) Natural Environment

- Identify protected and high value areas
- Identify and include key natural resource infrastructure e.g. Wales Coast Path
- Post-Brexit, help transpose the various Natura 2000 designations
- Support the future of the forestry sector and recognise the impact on the natural environment more broadly
- Working with NRW and its Area Statements, direct SDPs to consider the natural environment at the regional scale and make more of an integrated approach between the natural environment, sustainable growth, economic opportunities (such as eco-tourism) and the role of the natural environment in health and climate change topics.

k) Land and the Built Environment

- Identify nationally-important assets to be protected and supported
- Identify and support strategic development sites and priority industries
- Direct SDPs to identify and deliver regional initiatives and/or projects

5.4 How the NDF should support policy development

To help achieve the outcomes advocated above, the NDF should support policy development by utilising the five ways of working required by the Well-being of Future Generations (Wales) Act:

The NDF should...

- i. Set a clear vision of the Wales we want;
- ii. Prevent problems from occurring or getting worse;
- iii. Be developed to reflect the diversity and variations between the Welsh people;
- iv. Encourage cross sector collaboration and partnership; and
- v. Take into account the interrelated nature of policy themes and the support a whole systems approach to planning.

This approach will help set a framework for policy development and decision making across Wales and at different spatial levels. These ways of working will help the NDF reflect the key principles of national planning policy around placemaking and will help achieve sustainable development in Wales.

Appendix A

SWOT Results

Strengths

Strength	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of Planning
Subsidised local bus service	Y			Further study may help to clarify or support this across other regions.		Funding matter and programmes between local authorities and operators.
Recreation, active travel and Public Rights of Way network	Y	Y		Data shows that the South East Wales region also has an active travel and PRoW network	Y	Maintenance and management.
Tourism	Y	Y		Data shows tourism is also an important sector in South East Wales	Y	National and local promotion and funding.
Welsh Language	Y			Data shows that Mid & South West Wales Region also has a significant population of Welsh speakers	Y	National and local promotion and funding.
Industry and employment sites	Y		Y	Data shows that the Mid & South West Wales Region also contains strategic employment sites	Y	Fiscal incentives and skills development.
Steel industry (e.g. Port Talbot)		Y		Further study may help to clarify or support this across other regions.		Trade, marketing and sector-specific programmes and strategies (e.g. skills).
Agricultural development		Y	Y	Data shows that the agricultural sector is also a strength for the North Wales economy	Y	Funding (e.g. EU), land management and sector-specific programmes and government policy (e.g. skills).
Biosciences			Y	Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills).
Professional services			Y	Further study may help to clarify or support this across other regions.		Sector-specific programmes and government policy.

Business enterprise and SMEs		Y		Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills).
Good area for families / healthy lifestyle / quality of life / community spirit	Y	Y	Y	Further study may help to clarify or support this across other regions.		Regional and local funding, programmes and strategies (e.g. well-being and events).
Diversity of population and culture / identities		Y	Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. immigration, second homes and Welsh language targets).
Quality and protection of the Natural Environment and environmental destinations including landscape and water (including the National Park(s), AONB's and SLA's)	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Maintenance and land / resource management.
Health associated with the environment	Y	Y	Y	Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. well-being).
Forestry areas		Y		Data shows there are significant areas of forestry in South East Wales and North Wales as well as Mid & South West Wales.		Maintenance and land / resource management.
Location of housing		Y		Data shows that housing delivery in Mid & South West Wales has been highest in Carmarthenshire and Swansea.		Government policy (e.g. targets), land availability and market interest.
Competitive house prices	Y			Further study may help to clarify or support this across other regions.		Fiscal incentives and market drivers.
Good place for retirement	Y			Further study may help to clarify or support this across other regions.		Health sector and community services / facilities provision at the regional and local levels.

Digital connectivity	Y			Data shows that digital connectivity is poor across Wales particularly in rural areas	Y	Sector-specific programmes and strategies (e.g. high-speed broadband roll out).
Universities and colleges		Y	Y	Data shows that there is also University infrastructure in North Wales		Sector-specific programmes and funding.
Industry focussed education	Y			Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills).
Cross-border connections including to England and Ireland, as well as international	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Government policy, regional partnerships and collaboration.
Energy sector including low carbon economy (e.g. Wylfa and opportunities for renewables)	Y	Y		Further study may help to clarify or support this across other regions.	Y	Government policy, sector-specific programmes and strategies (e.g. targets and skills).
Minerals and extraction		Y		Data shows there is also a significant number of minerals sites in South East Wales	Y	Government policy, sector-specific programmes, land and resource management.
Minerals policy – moving away from fossil fuels			Y	Data shows there is a limited number of new minerals sites allocations across all regions		Government policy (e.g. energy and carbon targets).
NRW Area Statements	Y			Further study may help to clarify or support this across other regions.	Y	Conservation and enhancement at regional level.
Ports (e.g. Holyhead, Cardiff, Newport)	Y			Data shows that there is important port infrastructure in all regions	Y	Sector-specific programmes and strategies (e.g. trade and skills).
Airports and aerospace			Y	There is also strategic air transport infrastructure in North Wales	Y	Tourism promotion at national and regional levels and sector-specific programmes and strategies (e.g. trade and skills).

Transport network (e.g. roads and railways)	Y		Y	Data shows that there is also trunk road and rail connectivity in Mid & South West Wales, but it is sparser compared to the other two regions.	Y	Government policy (e.g. sustainable transport hierarchy) and operation / maintenance.
Metro proposals			Y	Further study may help to clarify or support this across other regions.		Government policy and sector-specific programmes and strategies (e.g. North and South Wales Metros).
Heritage assets and historic landscape	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Land and resource management and maintenance.
Retail sector			Y	Data demonstrates that there are also high-density retail sites in the North Wales region		Sector-specific programmes and strategies (e.g. skills).
Sports and entertainment			Y	Further study may help to clarify or support this across other regions.		Funding and Sector-specific programmes and strategies (e.g. skills).

Weaknesses

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of Planning
Housing – numbers, types and tenure don’t reflect local need	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Sector-specific programmes and strategies and market drivers.
Housing too focussed on developer needs not community needs, lack of variation	Y		Y	Further study may help to clarify or support this across other regions.		Government policy and fiscal incentives (e.g. community and self-build delivery) and sector-specific programmes, strategies and market drivers.
Housing not connected to sustainable transport			Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. transport hierarchy).
Land availability and viability	Y			Further study may help to clarify or support this across other regions.	Y	Land availability, management and market drivers.
Limited government funding	Y			Further study may help to clarify or support this across other regions.		Funding and fiscal incentives.
Energy efficiency of housing and fuel poverty	Y		Y	Further study may help to clarify or support this across other regions.		Government policy, funding and sector-specific programmes and strategies (e.g. clean energy targets and grants for homeowners).
Areas of deprivation and inequality with lack of investment			Y	Data shows that there are areas of deprivation and inequality across all three regions with concentrations in South East Wales and North Wales		Government policy, funding and regional and local economic and social initiatives (e.g. education, access to training and fiscal incentives).
Health infrastructure and pressure on services		Y		Further study may help to clarify or support this across other regions.		Health Board strategies and plans and future funding / delivery models.

Balance of communities impacted by demographics	Y	Y		Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. opportunities, facilities and services for different groups of people).
Out-migration of young people		Y		Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. opportunities and incentives for young people).
Welsh language a source of tensions			Y	Further study may help to clarify or support this across other regions.		Government policy and sector-specific programmes and strategies (e.g. education, promotion and targets).
Underselling as a place to live and visit	Y	Y		Further study may help to clarify or support this across other regions.		Promotional campaigns and prominence of other areas at the regional and local level.
Digital and telecoms connectivity, especially in rural areas	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y	Government policy and service provider investment programmes and strategies.
Agricultural – scale of farms (Co-op)	Y			Further study may help to clarify or support this across other regions.	Y	Sector-specific strategies in relation to viability and funding.
Competition with retail centres cross border	Y			Further study may help to clarify or support this across other regions.		Spatial competition, market forces and regional partnerships.
Student population and reliance on universities	Y	Y		Data suggests that South East Wales also has a high student population		Market forces and sector-specific programmes and strategies (e.g. opportunities and incentives for young people).
Retail moving online		Y	Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. technology and digital connectivity), consumer trends and market drivers.
Limited employment choices and reliance on low paid seasonal jobs (e.g. tourism)		Y		Further study may help to clarify or support this across other regions.	Y	Market forces and sector-specific programmes and strategies (e.g. skills and financial incentives).

Night time economy	Y		Further study may help to clarify or support this across other regions.		Market forces and response to population demand. Safety and licensing.
Skills base / lack of apprenticeships	Y	Y	Further study may help to clarify or support this across other regions.		Sector-specific strategies in relation to skills / training. Funding for business support. .
Limited large industrial sites		Y	Further study may help to clarify or support this across other regions.	Y	Market forces, sector specific programmes and strategies (e.g. financial incentives).
Empty business parks and nearby competition (e.g. M6 warehousing)	Y		Further study may help to clarify or support this across other regions.		Market forces and demand within regions / local areas.
Distance to markets and out-commuting	Y	Y	Further study may help to clarify or support this across other regions.	Y	Market forces and economic opportunity.
Low wage employment		Y	Further study may help to clarify or support this across other regions.		Local and regional economy and sector specific programmes / strategies (e.g. financial incentives).
Weak place planning	Y	Y	Further study may help to clarify or support this across other regions.		Governance and local level strategy / availability of funding.
Second homes	Y		Further study may help to clarify or support this across other regions.		Market forces and housing strategy. Financial measures to deter / restrict second home ownership.
Welsh language and culture dilution		Y	Further study may help to clarify or support this across other regions.	Y	National and local promotion and funding. Government strategies (e.g. Welsh language growth).
Air quality / increased traffic	Y		Data shows that poor air quality is also an issue in areas of South East Wales	Y	Market forces, lack of alternatives (e.g. public transport) and need for future infrastructure investment (e.g. EV charging).
Low economies of scale	Y		Further study may help to clarify or support this across other regions.		Market forces, cost of goods and services.
Over emphasis on environment when	Y		Further study may help to clarify or support this across other regions.	Y	Role of statutory bodies in the decision-making process. Ability to consult widely early in the development process.

considering development						
Public transport services and impact on isolation and social exclusion	Y		Y	Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. sustainable transport hierarchy) and funding of services, operation / maintenance.
Digital connectivity on public transport (e.g. wifi on trains)			Y	Further study may help to clarify or support this across other regions.		Funding and overarching quality / suitability of the public transport fleet.
Reliance on the car and difficulties changing behaviours to sustainable travel		Y	Y	Further study may help to clarify or support this across other regions.	Y	Market forces, lack of alternatives (e.g. public transport) and need for future infrastructure investment (e.g. EV charging).
Lack of electric vehicle infrastructure			Y	Further study may help to clarify or support this across other regions.	Y	Market forces and lack of government strategy on the provision of infrastructure.
Transport links, especially North – South	Y	Y		Data shows that links between North and South Wales are also limited from South East Wales	Y	Government policy (e.g. transport hierarchy, funding and priorities), maintenance and management
Traffic congestion (e.g. M4)			Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. transport hierarchy, funding and priorities), maintenance and management
Air travel	Y			Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. transport hierarchy, funding, targets and climate change).
Grid connectivity, energy storage and capacity		Y	Y	Further study may help to clarify or support this across other regions.	Y	Market processes (e.g. demand led system) and age of infrastructure.

Development in flood risk areas and resistance to SuDs	Y		Data suggests that flood risk is an issue in coastal areas of all three regions	Y	Government policy and guidance and application during the decision-making process.
Minerals and coal extraction		Y	Further study may help to clarify or support this across other regions.		Market forces – resource and demand led.
Waste management	Y	Y	Data shows that there are a limited number of allocated waste sites across all three regions		Government policy (e.g. waste hierarchy) and funding of services, operation / maintenance.
Air quality (e.g. impact of M4)		Y	Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. transport hierarchy, funding, targets and climate change).
Lack of joined up working (e.g. housing and health)		Y	Further study may help to clarify or support this across other regions.		Partnerships and collaboration at the regional and local level, funding and resources.
Land availability with holdings by Local Authorities		Y	Further study may help to clarify or support this across other regions.	Y	Governance and approach to asset management.
Influence of politics in planning		Y	Further study may help to clarify or support this across other regions.		Governance structures and arrangements.
Sectoral approach to planning		Y	Further study may help to clarify or support this across other regions.		Economic development focussed with key sectors / investment in mind.
Planning system as a barrier to development and inconsistent approach to rural development e.g. dwellings in the countryside	Y		Further study may help to clarify or support this across other regions.		Governance, precedents and local development planning.

Opportunities

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Welsh language targets	Y			Data shows that the Mid & South West Wales Region also have a high proportion of Welsh speakers	
Promotion of Welsh Language through schools	Y			Further study may help to clarify or support this across other regions.	
Housing provision / funding – both private and public sector	Y			Further study may help to clarify or support this across other regions.	
Community engagement early in development	Y			Further study may help to clarify or support this across other regions.	
Affordable housing – using empty units and public land	Y		Y	Further study may help to clarify or support this across other regions.	
More sustainable / green housing		Y		Further study may help to clarify or support this across other regions.	
Learning lessons from others (e.g. cultural protection in Lake District)	Y			Further study may help to clarify or support this across other regions.	
Regional focussed planning – tackling social issues	Y			Further study may help to clarify or support this across other regions.	
New jobs and employment opportunities to facilitate growth		Y	Y	Further study may help to clarify or support this across other regions.	
Port accessibility, imports and employment opportunities	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Access / connectivity to local facilities / focus development in areas reducing the need to travel	Y			Further study may help to clarify or support this across other regions.	Y
Obligation for developers to create community facilities early in process	Y			Further study may help to clarify or support this across other regions.	
Community support to self-fund / build facilities	Y			Further study may help to clarify or support this across other regions.	

Funding of tourism / leisure facilities	Y			Further study may help to clarify or support this across other regions.	
Tourism and scaling up			Y	Further study may help to clarify or support this across other regions.	Y
Diversifying tourism – coastal, green, accommodation types		Y		Further study may help to clarify or support this across other regions.	
Digital connectivity / home working	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Relationship between environment and active travel, healthy lifestyles and tourism	Y	Y		Further study may help to clarify or support this across other regions.	
Welsh medium secondary schools	Y			Further study may help to clarify or support this across other regions.	
Lower land values and house prices and inward migration / population growth / young people	Y		Y	Further study may help to clarify or support this across other regions.	
Quality of food and brands	Y			Further study may help to clarify or support this across other regions.	
Higher and further education courses, linking to employment	Y	Y		Further study may help to clarify or support this across other regions.	
City Deals (e.g. Cardiff City Deal, and North West Growth Deal)	Y		Y	Further study may help to clarify or support this across other regions.	
Energy / Low Carbon Sectors / Micro-generation / community schemes	Y		Y	Further study may help to clarify or support this across other regions.	Y
District heating			Y	Further study may help to clarify or support this across other regions.	
Greater use of renewables (e.g. solar, wind, tidal)	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Electricity grid connectivity	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Digital / high value jobs	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
SME growth / incubators	Y		Y	Further study may help to clarify or support this across other regions.	Y
Social enterprises	Y			Further study may help to clarify or support this across other regions.	

Repurposed town centres / empty spaces / future of retail	Y			Data shows that there are also smaller retail service centres scattered across Mid and South West Wales	Y
Better place planning		Y		Further study may help to clarify or support this across other regions.	
Smaller scale live / work developments			Y	Further study may help to clarify or support this across other regions.	
Lengthening tourism season	Y			Further study may help to clarify or support this across other regions.	Y
Agri-tourism / agricultural produce	Y	Y		Further study may help to clarify or support this across other regions.	Y
Future of government services	Y			Further study may help to clarify or support this across other regions.	
Apprenticeships and skills development	Y		Y	Further study may help to clarify or support this across other regions.	
Modal shift / better public transport	Y		Y	Data suggests this is also an opportunity area in the Mid & South West Wales Region.	Y
Electric vehicle charging infrastructure	Y		Y	Further study may help to clarify or support this across other regions.	Y
Sustainable drainage as part of new development	Y		Y	Further study may help to clarify or support this across other regions.	Y
Treatment and use of previously contaminated land			Y	Data shows that there is a high number of former waste sites and former minerals sites subject to contamination in all three regions	
Greater environmental controls		Y		Data suggests that the natural environment is a strong asset to all regions	
Forestry industry		Y		Further study may help to clarify or support this across other regions.	
NRW Area Statements	Y			Further study may help to clarify or support this across other regions.	Y
Data collection and land management		Y		Further study may help to clarify or support this across other regions.	
Environmental education		Y		Further study may help to clarify or support this across other regions.	
Building capacity and standards in the National Park	Y			Further study may help to clarify or support this across other regions.	Y
Planning for climate change and decarbonisation	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Shoreline Management Plans (and strategic plans for water management / defences)	Y		Y	Further study may help to clarify or support this across other regions.	Y

Minerals extraction and mining	Y	Y	Data suggests that there are also significant minerals sites in South East Wales.	
Minerals and waste planning at regional scale	Y		Further study may help to clarify or support this across other regions.	Y
Circular economy opportunities	Y	Y	Further study may help to clarify or support this across other regions.	
Green infrastructure and solutions linked to well-being goals			Y	Further study may help to clarify or support this across other regions.
NDF and Marine Plan, including support for marine industries	Y	Y	Further study may help to clarify or support this across other regions.	Y
Encouraging new uses for heritage assets including listed buildings	Y	Y	Data shows that there is also a significant number of designated heritage assets in the South East Wales region	Y
Strong national level placemaking			Y	Further study may help to clarify or support this across other regions.
Removing the Severn Bridge Tolls			Y	Further study may help to clarify or support this across other regions.
Aging population with larger working populations			Y	Further study may help to clarify or support this across other regions.

Threats

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Closing of education facilities and retaining skills	Y	Y		Further study may help to clarify or support this across other regions.	
Diminishing Welsh language and cultural heritage	Y	Y		Data suggests that the use of the Welsh language is still most prevalent in the North Wales and Mid & South West Wales regions.	
Labour / population trends post Brexit	Y			Further study may help to clarify or support this across other regions.	
Negative population growth		Y		Further study may help to clarify or support this across other regions.	

Future of agriculture	Y			Further study may help to clarify or support this across other regions.	
Lack of homes and affordable homes	Y	Y		Housing delivery data suggests that this is a threat to all regions	
Aging population and pressure on housing and health services		Y	Y	Further study may help to clarify or support this across other regions.	
Retaining jobs / income from tourism	Y			Further study may help to clarify or support this across other regions.	
Retaining young people	Y			Further study may help to clarify or support this across other regions.	
Maintenance of active travel / PRow	Y			Data shows that there are also a number of active travel routes and extensive PRow networks across the whole of Wales.	
Culture and communities lost due to second homes	Y	Y		Further study may help to clarify or support this across other regions.	
Skills / staff shortage for businesses	Y		Y	Further study may help to clarify or support this across other regions.	
Automation / industrialisation		Y		Further study may help to clarify or support this across other regions.	
Reducing quality and choice of jobs, particularly post Brexit with possible impacts on unemployment, changes in agriculture and ports		Y	Y	Further study may help to clarify or support this across other regions.	
Access to government funding especially post Brexit			Y	Further study may help to clarify or support this across other regions.	
Demand for services through population growth and impact on health infrastructure	Y	Y		Further study may help to clarify or support this across other regions.	
Stalled sites / viability	Y			Further study may help to clarify or support this across other regions.	
New pylons and impact on environment	Y			Further study may help to clarify or support this across other regions.	Y
Internet retail	Y			Further study may help to clarify or support this across other regions.	
Flood risk and development	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Water quality, polluting and health		Y		Further study may help to clarify or support this across other regions.	
Extreme weather / climate change	Y	Y	Y	Further study may help to clarify or support this across other regions.	Y
Resilience of transport network	Y			Data shows that Wales is most well-connected by road	Y

Impact of tourism on the natural environment	Y	Further study may help to clarify or support this across other regions.	Y
Impact of agriculture on the natural environment	Y	Further study may help to clarify or support this across other regions.	Y
Balance agriculture / environmental protection	Y	Further study may help to clarify or support this across other regions.	
Unregulated waste disposal	Y	Further study may help to clarify or support this across other regions.	
Environmental constraints impacting on availability of land and capacity to develop	Y	Data shows that all regions have a high number of nationally and regionally significant designated sites	Y
Grid connectivity limiting renewable energy potential	Y	Further study may help to clarify or support this across other regions.	Y
Accountability in decision making (national / regional)	Y	Further study may help to clarify or support this across other regions.	