



Welsh Government

Independent Review of Marine
Planning Approaches for Wales

Summary Report

March 2025

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1. Introduction and Approach

Introduction

In 2022, the Climate Change, Environment and Infrastructure (CCEI) Committee of Senedd Cymru / Welsh Parliament undertook a ‘snapshot’ inquiry into Welsh Government’s marine policies and published a report with 20 recommendations relating to planning, licensing, evidence, nature conservation and blue carbon.

In response to stakeholder calls for provision of greater spatial direction through marine planning, while ensuring a stable planning system to give certainty for developers, one of the Committee’s recommendations called for an independent review of marine planning.

The then Minister for Climate Change issued a Written Statement in March 2023, setting out priorities for taking forward marine planning.

These included developing approaches to provide greater spatial clarity and direction for development through the Wales National Marine Plan (WNMP), while protecting and enhancing the marine environment.

In September 2024, Arup were appointed to

undertake an independent review of marine planning approaches in Wales. This report summarises the key findings, recommendations and sets out potential initial actions.

Approach

This independent review has considered how Wales can further develop the Welsh marine planning framework to provide greater spatial clarity and direction for marine development, balancing support for renewable energy whilst protecting and enhancing the marine environment.

It has also considered marine planning approaches elsewhere, to inform our understanding of good practice and future opportunities for marine planning in Wales.

Key areas of focus have been:

- Approaches taken by other planning regimes and options for taking common approaches with neighbouring UK marine plan areas.
- Opportunities and tools for providing greater spatial clarity and direction through the marine

planning framework in Wales.

- Balancing development with protecting the marine environment, and planning approaches to help protect and enhance marine biodiversity.
- Promoting stronger integration with terrestrial planning policy.
- Evidence and impact assessment requirements.

In support of this review Arup has undertaken:

- A comprehensive literature review.
- Deep-dive discussions with members of the Marine Planning Stakeholder Reference Group (MPSRG).
- A Stakeholder Workshop with selected representatives of the MPSRG and other key stakeholders involved in the marine and terrestrial planning systems, exploring different perspectives on marine planning based on emerging themes.



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2. SWOT Analysis

The key findings from the literature review and stakeholder engagement exercise have been grouped into the following Strengths, Weaknesses, Opportunities, and Threats:

Strengths	Weaknesses
<p>The WNMP gives equal importance to all sectors, ensuring no exclusions. It balances competing demands with flexibility. The plan's national scope avoids inconsistent regional details. The Wales Marine Planning Portal is user-friendly with useful datasets.</p>	<p>There is limited integration between marine planning and terrestrial planning, particularly via fluvial hydrological linkages, which can result in confusion for applicants and duplication of efforts for decision-makers. Additionally, there is a lack of basic environmental and physical baseline (e.g. geophysical data), that can lead to developments in sub-optimal locations potentially creating complexity in design and requiring additional mitigation to manage changes. Furthermore, there is no clear advisory body or consultee to assess applications for socio-economic impact.</p>
Opportunities	Threats
<p>Applications for development involving land and water could be streamlined through a coordinated process similar to the English Coastal Concordat approach. The Wales Marine Planning Portal could be improved by integrating and targeting WNMP policies into the marine portal and providing additional guidance for applicants and decision-makers on these policies. Developing 'area plans' for cross-border locations and major ports are recommended, alongside establishing an SRA-type approach for biodiversity and environmental enhancement. Increased stakeholder collaboration should be fostered to strengthen relationships, while promoting Ocean Literacy in local communities to engage them in marine planning. Effective management of the Marine Protected Area (MPA) network could be strengthened, supporting colocation and / or coexistence of certain activities and sectors where appropriate. Setting clear targets and SMART policy objectives for each sector is crucial to encourage spatial marine planning.</p>	<p>Commercial sensitivity is limiting progress towards a shared baseline for seabed users. Public sector resourcing and budget in Wales are constrained. The Crown Estate's leasing dictates development opportunities, rather than the WNMP. Future leasing rounds may be in data-limited areas preventing a proactive evidence-led approach. In the absence of appropriate foresight and planning, marine developments may exceed the environmental capacity of Welsh marine areas, risking overuse by certain sectors. Climate change and shifting sectoral needs have cumulative impacts on the marine environment.</p>

3. Recommendations

Nine recommendations are made, which capture and address the results of the review, and respond to the SWOT analysis:

1 Recommendation: Facilitate proactive stakeholder engagement and establish a Marine Developer's Forum

Stakeholders report positive and proactive engagement by the Welsh Government with key marine environment stakeholders in Wales, recommending continued active engagement through in-person meetings and bespoke sector interactions. Enhanced collaboration with key organisations including The Crown Estate is deemed crucial for influencing marine development directions and disseminating marine data, while earlier access to strategic datasets, such as marine ornithology data, will help facilitate better development proposals, decisions and industry research. Developing a Marine Developer's Forum (wind energy, tidal energy, etc.) to combine resources for research and information sharing across stakeholders is also encouraged.

2 Recommendation: Empower community involvement and facilitate better socioeconomic outcomes

Stakeholders recommend targeting engagement with local communities, particularly for upcoming SRA proposals, integrating their inputs into the evidence base. Identifying an existing consultee or advisory body, such as the Future Generations Commissioner for Wales, to help explore how Wales can better assess the socioeconomic impacts of marine developments, provides an opportunity for better outcomes aligned to the well-being goals in Wales. Strengthening social value policies and opportunities, applying models for Sustainable Management of Natural Resources, and considering a Natural Capital Assessment Approach is also advised to support delivery of SMNR as currently piloted in the England East Marine Plan. Stakeholders also highlighted the necessity for training and guidance materials to enhance public (and coastal community) engagement, welcoming the Wales Coasts and Seas Partnership's (CaSP) Ocean Literacy Framework as a valuable tool.

3 Recommendation: Improve integration between marine and terrestrial planning

The integration of marine and terrestrial planning is crucial to consider the interrelationships and cumulative impacts of developments, with stakeholder recommending better integration through initiatives like a Coastal Concordat, inclusion of terrestrial planners in marine planning discussions, and cross-sector collaboration. Improving integration through the emerging terrestrial Strategic Development Plans at a regional scale offers a strong opportunity for policy integration, whilst regional planning in Wales could help improve resource, knowledge and skills coordination.

3. Recommendations

4 Recommendation: Explore opportunities to further share data and evidence

Stakeholders acknowledged the value of the Wales Marine Planning Portal's existing data and suggested enhancements, including integrating additional datasets from various sources, conducting targeted data acquisition to inform key risks and develop strategic baselines, and refining existing datasets for better clarity. There is a key importance to aligning data platforms and focusing efforts for evidence collation on sensitive areas, such as biodiversity hotspots, to provide spatial clarity where data is currently limited.

5 Recommendation: Strengthen the protection and enhancement of the marine environment

Stakeholders suggested enhancing the MPA network through zoning and engagement to protect sensitive areas, considering non-statutory marine protected areas like IUCN-notified Important Marine Mammal Areas. Emphasis was placed on reviewing offshore habitat protection due to limited data in deeper waters. The suggestion included mandating fishing exclusion zones around offshore renewable energy developments to boost biodiversity. Additionally, the expansion of floating offshore wind in the Celtic Sea requires consideration of seascape, landscape and visual impacts; particularly 'wet storage' where turbines are constructed and stored in ports pending transfer offshore. Effective data acquisition and adaptive monitoring are recommended to avoid exceeding the carrying capacity of sensitive populations and to guide effective decision-making on how to manage sector capacity.

6 Recommendation: Enhance climate resilience and adaptation

Support for research on climate change impacts and strategic mapping of opportunities to enhance climate resilience is crucial. This involves considering future ecosystem shifts and adapting MPA boundaries accordingly. Evaluating current climate policies, aligning the WNMP with the Welsh Climate Change Strategy, and considering up-to-date climate data during scheduled WNMP reviews to consider whether climate policies requires refinement or strengthening is recommended.

3. Recommendations

7 Recommendation: Support spatial prioritisation for key sectors

Stakeholders identified the importance of SRAs for sectors with spatial limitations, advocating for their implementation to guide marine development in Wales aligned to Welsh Government priorities, with provision of spatial prioritisation for key sectors, and were supportive of continuing the current direction of travel via SRA delivery. Key sectors identified include floating offshore wind, wave energy, tidal range, mariculture, marine aggregates, and marine restoration. This would provide confidence for sectors and investors and support regulatory processes to focus on evidence requirements, assessment techniques and generate appropriate capacity and expertise to support focus sectors, potentially facilitating consenting processes.

8 Recommendation: Maintain the national approach to the framework and complement with focused regional guidance

Stakeholders recommended keeping the WNMP's single national plan covering both inshore and offshore areas, due to its simplicity and clarity. They noted the likely complexity and higher costs of managing multiple regional plans in Wales. Although preferring a national plan, respondents supported regional guidance, similar to the Severn Estuary cross-border guidance for the Dee Estuary, and for high-intensity areas like Milford Haven Port.

9 Recommendation: Support decision making with technical guidance and tools

Respondents suggested bespoke marine planning guidance to enhance the WNMP, similar to Welsh terrestrial planning documents like Technical Advice Notes and Supplementary Planning Guidance. These documents would aid in implementing the WNMP and applying its policies during marine licence decisions. The MMO Marine Portal was praised for mapping policies spatially, helping users identify relevant policies for their interests. A similar approach is recommended for the Wales Marine Planning Portal to ease marine licence application processes.

4. Concluding Statement

The broad consensus from stakeholders indicates that the WNMP is fit-for-purpose and is effective in delivering marine planning in Wales.

Our review has highlighted the novelty of the marine planning system in Wales and the positive integration of lessons learnt from other marine planning regimes that have led to its successful implementation.

Stakeholders support that the Welsh Government collaborates and engages well across sectors, NGOs, and regulators, as well as geographies, supporting the cohesive delivery of marine planning across the UK in accordance with the aspirations of the UK Marine Policy Statement. Fundamentally, stakeholders attribute the success of the WNMP to this successful integration and collaboration.

While the positive reflection on the WNMP is notable in our review, recommendations are made for opportunities to build on, enhance, and refine the WNMP and its supporting components. They do not involve sweeping changes nor identify fundamental deficiencies. Our recommendations represent an enhanced approach to fostering relationships, facilitating better socioeconomic outcomes, and supporting environmental enhancement and climate resilience.

In conclusion, the future of marine planning in Wales is promising, with strong engagement and collaboration from stakeholders, and continued refinement of policies, tools and guidance to improve integration, evidence-based and effective decision making. This review marks a progressive path forward, helping ensure that Wales remains at the forefront of sustainable marine planning.

