

Swansea Bay and Llanelli National Growth Area (NGA) Definition Project Research Report

January 2023



Turley

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Client: Neath Port Talbot, Pembrokeshire Councils, Carmarthenshire, Swansea

Our reference: CARP3002

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1. Introduction

- 1.1 The National Development Framework for Wales (NDF) published February 2020 sets the national direction for growth and development in Wales to 2040.
- 1.2 Future Wales Policy 1 'Where Wales will grow' says that the Welsh Government supports sustainable growth in all parts of Wales and identifies the following three National Growth Areas (NGA) where it says that there will be a growth in employment and housing opportunities and investment in infrastructure:
 - Cardiff, Newport and the Valleys;
 - Swansea Bay and Llanelli; and
 - Wrexham and Deeside
- 1.3 Policy 1 says that these national growth areas are complemented by Regional Growth Areas (RGAs) in the following three regions which will grow, develop and offer a variety of public and commercial services at a regional scale:
 - The South West;
 - Mid Wales; and
 - The North
- 1.4 Further to the above growth areas, Policy 1 says that development and growth in towns and villages in rural areas should be of an appropriate scale and support local aspirations and need.
- 1.5 Future Wales does not define the extent of the Swansea Bay and Llanelli NGA (SBLNGA), with the visual representation of its boundary outlined in the South West Wales Regional Diagram by a purple hatched area which suggests the inclusion of the larger urban areas, named as Neath, Port Talbot, the City of Swansea and Llanelli, and employment centres across the coastal area, whilst also stretching northwards to the edge of the National Park. This illustration is replicated at Figure 1.1.

Figure 1.1: South West Wales Regional Diagram



Source: Future Wales

- 1.6 The authorities of Carmarthenshire, Pembrokeshire, Neath Port Talbot (NPT) and Swansea jointly appointed Turley to undertake a comprehensive assessment of the Swansea Bay and Llanelli National Growth Area (SBLNGA).
- 1.7 The work will be used to inform the preparation of the individual local authorities' Replacement Local Development Plans (RLDPs) which are being progressed independently by each Council and are at various stages of Plan preparation. The work will also feed into the preparation of background evidence, policies and proposals to be formulated for the first South West Wales Strategic Development Plan (SDP).

Study objective

- 1.8 The objective of this study is to undertake an assessment of the constraints and opportunities across the area understood to be broadly encompassed by the SBLNGA. This is in order to refine the spatial extent of the NGA to help to inform the production of RLDPs ahead of the South West Wales Corporate Joint Committee (CJC) defining the extent of the NGA as part of the preparation of the SDP. As a result, it is not intended to explicitly define the extent of the NGA in terms of identifiable boundaries, as this is a process to be undertaken as part of the production of the SDP. This approach is in line with the supporting text to Future Wales Policy 19 'Strategic Policies for Regional Planning' which states that the growth of the NGA should be planned through the preparation of the SDP.
- 1.9 The SDP will be required to adopt a sub-regional consideration as to the movement and distribution of jobs and people across South West Wales and support an integrated approach to strategic land-use and transport planning. An

agreed geographic definition of the NGA within the SDP will be important in framing this higher-level spatial planning between the authorities in the sub-region.

- 1.10 It is a requirement of national planning policy and guidance that all SDPs and LDPs are in general conformity with themselves and with Future Wales. Given this, the outputs from the project will also inform the work of individual local authorities in their development of RLDPs. This recognises that the definition of the NGA boundary/spatial extent within each authority could have implications for the spatial strategy and therefore the distribution of housing and employment land.
- 1.11 It should be noted that this research report has no weight in the determination of planning applications and does not form part of the adopted development plan policies for the Councils.

Report structure

- 1.12 The rest of this report is structured as follows:
- Section 2: Research methodology
 - Section 3: Policy context
 - Section 4: Current socio-economic spatial context
 - Section 5: Opportunities for growth
 - Section 6: Potential constraints
 - Section 7: Refining the spatial extent of the NGA
 - Section 8: Summary and policy considerations

2. Research methodology

- 2.1 There is no prescribed methodology in published guidance or policy as to how authorities should approach the refining of the spatial concept of the NGA's (or RGAs) introduced in Future Wales.
- 2.2 As explained in section 1 it will be a role of the SDP to interpret the scale of national and regional growth areas within their geographic boundary.
- 2.3 To assist the CJC to progress the SDP, including the defining of the NGA boundary, it is understood that it is the intention for WG to publish guidance, following a process of consultation in 2023. It is anticipated that this guidance will consider key plan-making aspects such as a regional spatial strategy and the development of spatial options for growth. This will require the interpretation and rationalisation of informing elements such as, but not limited to; economic opportunities, demand pressures and environmental assets, to determine how they impact on the scale and distribution of growth.
- 2.4 In the absence of guidance and a prescribed methodology an approach has been developed which responds to the brief set by the authorities for this research and recognises the objectives set out in the preceding section. This is described below. It is anticipated that the authorities will reflect on the implications of guidance once finalised by WG to interpret the conclusions of this work as appropriate.

Approach

- 2.5 The research approach has used a combination of desk-top based analysis and stakeholder engagement. Extensive use has been made of Geographical Information Systems (GIS), with outputs of this mapping provided within this report.
- 2.6 A series of tasks have been undertaken as part of the research process. These are introduced below, and the outputs presented in appropriate subsequent sections of the report.

Task 1: Policy review and mapping of planned areas of change.

- 2.7 This has included a review of Future Wales, recognising that it sets a spatial direction for where investment in infrastructure and development will be directed for the greater good of Wales and its people. Consideration is also given to other national policy, primarily Planning Policy Wales (PPW)
- 2.8 Separate consideration has been given to the programmes and processes underway within each of the component authorities in the evolution of their LDPs, with this informing separate analysis as to the existing and emerging spatial identification of future growth opportunities as well as an understanding of the hierarchy of settlements.

2.9 Acknowledging the importance of economic drivers on the rationale for the NGA a concise review has also been undertaken of relevant economic and regeneration strategies (e.g. City Deal) and designations (e.g. enterprise zones) and infrastructure investment plans. The output of this review is summarised in section 3 but with references at appropriate points expanding on aspects of detail throughout the report.

Task 2: Socio-economic spatial analysis

2.10 A range of informing datasets have been analysed and mapped including population, jobs and social and transport infrastructure to build a spatial profile which considers current concentrations of activities and the comparative sustainability / connectivity of settlements across the study area.

Task 3: Mapping of potential constraints

2.11 A range of environmental and policy layers of constraint have been mapped, based on information provided or signposted by the authorities.

Task 4: Engagement

2.12 A process of engagement has been conducted to inform the research, including:

- Meetings with officers within each of the local authorities within and in proximity to the NGA. Discussions were held with each of the commissioning authorities separately, as well as Pembrokeshire, Bridgend and Powys Councils to identify their key considerations in arriving at an understanding of the spatial extent of the NGA.
- Engagement with private sector stakeholders including a number of businesses located within the authorities. A separate workshop was held with housebuilders, RSLs and the Home Builders Federation (HBF) in September.
- A meeting with representatives of the WG shortly after project commencement, to discuss the proposed methodological approach and the objectives of the research. A further meeting was held with the WG to discuss emerging draft findings towards the end of the research programme. Feedback was taken into account in the finalising of the research and the recommendations.
- A meeting with representatives of Transport for Wales (TfW) to discuss planned strategic investments, including active travel. Separate engagement was undertaken with officers responsible for transport related activities from each of the commissioning authorities.

2.13 An overview of the key emerging observations provided through the engagement undertaken to inform the research is included as Appendix 1 to this report.

Task 5: Implications for the refining of the spatial extent of the NGA

- 2.14 The outputs of the above tasks, including views shared through the engagement process, were used to inform an iterative process of developing a working version of a defined spatial extent of the NGA in accordance with the objective set out in section 1. Separate discussions were held with the officer project group to derive a final iteration of an illustrative map of the area and spatial description of the geography encompassed. In line with the brief the output of this task recognises that it is not the objective of the assessment to arrive at a delineated spatial boundary where this will be undertaken by the CJC as part of the preparation of the SDP.

Task 6: Policy recommendations

- 2.15 Engagement through the research process highlighted important issues to which policy will need to respond in taking forward the concept of the NGA and its application within different tiers of the plan-making system, including future RLDPs and the SDP. These issues have been considered with high-level recommendations provided to assist the authorities moving forward including the approaches to be taken to large scale development within and outside the NGA.

3. Policy context

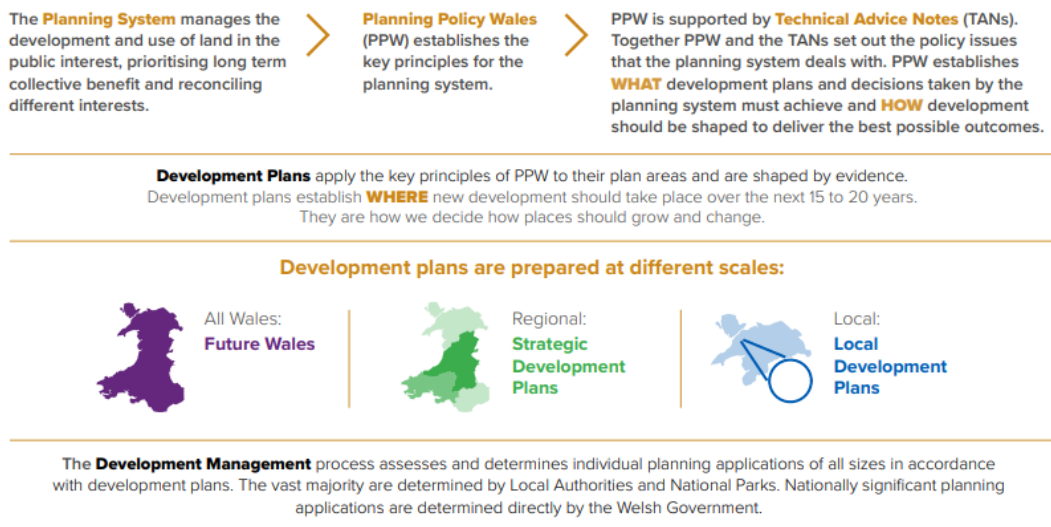
3.1 This section provides an overview of the existing policy context. It focusses on the justification and identification of the NGAs within Future Wales but complements this with a consideration of the future relationship with SDPs and the existing local policy context provided by current and emerging LDPs.

National Planning Policy

3.2 Planning Policy Wales (PPW) and the National Development Framework (Future Wales – the National Plan 2040) set out how the planning system at a national, regional and local level can assist in delivering sustainable development and achieving sustainable places through SDPs and LDPs.

3.3 The following graphic, taken from PPW, illustrates how the different tiers of the development plan cumulatively address national identified planning issues.

Figure 3.1: The Welsh national planning process



Source: Figure 3 Planning Policy Wales, Edn 11 (February 2021)

3.4 PPW does not specifically address NGAs, however, it provides context to the production of spatial strategies within development plans, including LDPs but also in the future through SDPs. It reaffirms the fact that these plans must be in general conformity with Future Wales, confirming in the case of spatial strategies that these should be consistent with the Key Planning Principles and contribute towards the National Sustainable Placemaking Outcomes. Further consideration is given to the guidance provided on SDPs later in this section.

Future Wales 2040

- 3.5 Future Wales: The National Plan 2040 (hereafter Future Wales) is the national development plan for Wales. Published in February 2021, it forms part of the statutory development plan for local authorities in Wales.
- 3.6 Prior to considering the NGAs specifically, it is important as set out in PPW to acknowledge the underlying Outcomes defined in Future Wales. These are introduced as overarching ambitions based on national planning principles and national sustainable placemaking outcomes set in PPW. They therefore represent a vision or statement as to where the WG wants Wales to be in 20 years. Importantly, in the context of the assessment of the NGA, Future Wales is clear to state that:

‘Every part of Future Wales, from the spatial strategy to regional policies, is concerned with achieving the Outcomes’ (Future Wales, page 52)

- 3.7 The defined NGA must therefore be able to demonstrate compliance with and support in delivering against the 11 Outcomes, as summarised as ‘A Wales where people live:

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

Policy 1: Where Wales will grow - The Spatial Strategy and National Growth Areas

- 3.8 The underlying principles of identifying concurrent opportunities for the growth of jobs, communities and infrastructure and the agglomeration effects which can be achieved by concentrated areas of growth are, as Future Wales states, strongly aligned with achieving the above Outcomes. Indeed, in introducing its spatial strategy it clearly states that:

‘Co-locating homes, jobs and services means focusing on **cities and large towns** as the main development areas...Growing urban areas across Wales will create concentrations of jobs, services and amenities and a critical mass of people to sustain good public transport services and a range of economic activities.’ (Future Wales, page 60)

- 3.9 Policy 1 ‘Where Wales will grow’ states, in the context of the above that:

‘In three National Growth Areas there will be growth in employment and housing opportunities and investment in infrastructure’ (Future Wales, page 62)

- 3.10 It proceeds in the supporting text to provide its justification for the identification of these three areas, of which Swansea Bay and Llanelli is one, stating:

‘Each of these urban areas is economically distinctive, supporting a range of businesses, enterprises and universities, and offering culturally rich lifestyles to residents and visitors. They are internationally and nationally significant places and this strategy promotes their continued growth and regeneration.’ (Future Wales, page 62)

- 3.11 Sustainably accommodating such growth in accordance with these outcomes also requires consideration of the proximity of rural / connected environments and minimising the adverse impacts on such areas arising from growth. Indeed, Future Wales confirms:

‘By focusing large scale growth on the urban areas, development pressures can be channelled away from the countryside and productive agricultural land can be protected.’ (Future Wales, page 64)

- 3.12 It also identifies that:

‘The spatial strategy empowers local policy and decision-makers to develop the national priorities through Strategic and Local Development Plans and identify areas of significance to their particular area’ (Future Wales, page 64)

- 3.13 The structuring of this report to consider separately the existing socio-economic spatial make-up of the area, opportunities to accommodate growth and the

fundamental environmental constraints accords with the spatial principles and therefore the Outcomes which are sought through Future Wales.

Policy 28 – National Growth Area – Swansea Bay and Llanelli

3.14 In line with Policy 1, Policy 28 confirms that Swansea Bay and Llanelli will be the main focus for growth and investment in the South West region.

3.15 In understanding the rationale for the NGA designation, it is important to note in this context that the Policy confirms that it will be the focus for:

- Strategic economic and housing growth;
- Essential services and facilities; and
- Advanced manufacturing, transport and digital infrastructure

3.16 The supporting justification text states:

‘The area comprising Neath, Port Talbot, the City of Swansea and Llanelli will be the primary growth area for the region.

3.17 It proceeds to confirm that this area is the main existing centre of:

- Population,
- Employment;
- Services; and
- Is served by the main connectivity infrastructure

3.18 With regard to the intended impact of the identification of an area within a NGA, Future Wales confirms that they are intended to provide ‘a framework for co-ordinated policies, infrastructure delivery and spending by Government, local authorities and stakeholders.’ [Reference: Future Wales, page 106]

3.19 Where the above provide WG’s rationale for the identification and definition of NGAs, it is helpful to draw out the distinction made with other regional growth policies also set out in Future Wales. Future Wales makes the distinction that these areas ‘perform important functional roles within their region’ [Reference: Ibid, page 107] and their status as key centres for:

- Employment;
- Services;
- Tourism,
- Retail; and

- Culture

3.20 In this context Policy 29 defines Carmarthen and the Haven Towns (Haverfordwest, Milford Haven, Pembroke and Pembroke Dock) as regional growth areas and therefore a focus for managed growth. In defining these geographies, the policy acknowledges their strong links to the NGA.

3.21 Finally, in terms of the wider relationship with growth across other parts of the authorities it is important to recognise that Policy 1 and the supporting text confirms that:

‘In all parts of Wales the strategy supports sustainable growth. Any place without jobs, homes, community spaces and wildlife has no prospect of having a thriving and cohesive community, Welsh language or economy.’

3.22 In support of this below the NGAs and RGAs Policy 1 confirms that: ‘Development and growth in towns and villages in rural areas should be of appropriate scale and support local aspirations and need.’ [Reference: Future Wales, page 62] The supporting text continues to affirm that development in these locations should complement rather than compete with efforts to grow cities and towns.

Policy 19 Strategic Policies for Regional Planning and Strategic Development Plans

3.23 Policy 19 of Future Wales establishes the scope of an SDP, which includes inter alia: a spatial strategy, a settlement hierarchy, the housing provision and requirement, the gypsy and traveller need, the employment provision, the spatial areas for strategic housing, employment growth and renewable energy, the identification of green belts, green corridors and nationally significant landscapes where required.

3.24 PPW confirms that SDPs should be prepared on a regional basis and should reflect functional areas, to address issues such as regional housing markets, travel to work patterns and economic opportunity areas. It also confirms that the preparation of an SDP allows opportunities and challenges to be considered and planned for in an integrated and comprehensive way, promoting the achievement of positive planning outcomes.

3.25 The South West Wales SDP area includes the following authorities: Brecon Beacons NPA (Part), Carmarthenshire, Neath Port Talbot, Pembrokeshire CC, Pembrokeshire Coast NPA and Swansea.

3.26 The Town and Country Planning (Strategic Development Plan) (Wales) Regulations 2021 came into force on the 28 February 2022, prior to all four CJsCs having the ability to exercise their strategic planning function from the 30 June 2022. The SDP Regulations confirm that the process for preparing an SDP broadly mirrors that of the LDP process. As set out in section 2 it is understood

that guidance for the preparation of SDPs will be published in 2023 following a process of consultation.

- 3.27 Prior to this guidance being formally published it is acknowledged that it is understood that the planning period of an SDP will be expected to be reasonably long-term i.e. 25 years and that it will establish the scale and spatial distribution of growth for subsequent Local Development Plan Lite (LDPL) documents which will be required to be prepared by individual authorities or through collaboration following the adoption of the SDP.

Other Future Wales policies

- 3.28 There are a number of other policies which have a direct bearing on the potential definition of the NGA in Future Wales. These include the following which are considered in more detail at the appropriate point in subsequent sections of this report:

- Policy 6 Town Centre First
- Policy 11 National Connectivity
- Policy 17 Renewable and Low Carbon Energy and Associated Infrastructure
- Policy 30 Green Belts in the South West
- Policy 31 South West Metro

Key economic strategies

WG economic strategy

- 3.29 Nationally, the WG's Economic Action Plan (2017) highlighted the existence of spatial variations in economic outcomes across Wales, in the context of a persistent productivity deficit overall. It committed to an enhanced regional approach to economic strategy, reflected in Future Wales and informing the regional strategy approaches set out below.

- 3.30 More recently, the Economic Reconstruction and Resilience Mission (2021), developed in the light of the Covid-19 pandemic, set out a vision of a "well-being economy which drives prosperity, is environmentally sound, and helps everyone realise their potential" [Reference: Welsh Government (2021), Economic Reconstruction and Resilience Mission, p.6 (<https://gov.wales/sites/default/files/publications/2021-02/economic-resilience-reconstruction-mission.pdf#:~:text=3Our%20Economic%20Resilience%20%26%20Reconstructi on%20Mission%20We%20have,the%20economic%20impact%20while%20supporting%20business%20and%20workers>.)]. Its focus is on achieving a greener, fairer and more prosperous economy, highlighting (inter alia) opportunities to

develop the ‘foundational economy’ and low carbon growth. The Mission also contains an emphasis on broadening the offer of Wales’ town centres, linked with support for increased local working and the ‘town centre first’ principles set out in Future Wales.

Regional strategy

3.31 In South West Wales, there is a positive history of regional co-operation in economic development and regeneration matters. In 2013, the four local authorities of Carmarthenshire, NPT, Pembrokeshire and Swansea adopted a Swansea Bay City Region Economic Regeneration Strategy. This provided the strategic basis for the Swansea Bay City Deal, a package of nine programmes and projects across the region, supported by £236 million investment from the UK and WGs, delivery of which is now well underway [Reference: Swansea Bay City Deal: <https://www.swanseabaycitydeal.wales/>]. Within the City Deal portfolio, there is a strong orientation towards energy and decarbonisation, innovation and digitalisation, as illustrated in Table 3.1.

Table 3.1: Swansea Bay City Deal portfolio

Project/ programme	Description
Canolfan S4C Yr Egin	Headquarters facility for S4C and hub for creative businesses, located alongside University of Wales Trinity St David, Carmarthen
Swansea City and Waterfront Digital District	Series of transformational investments in Swansea, including new Arena; office development at Kingsway; and ‘Innovation Matrix’ facility at UWTSD’s SA1 campus
Supporting Innovation and Low Carbon Growth	Series of projects to support decarbonisation and improved access to business premises (including the new Swansea Bay Technology Centre at Baglan Energy Park)
Pentre Awel	Life science and wellbeing village at Llanelli, with combination of leisure, R&D, educational and commercial space
Homes as Power Stations	Improved residential energy efficiency, through new build and retrofit installation of renewable technologies
Pembroke Dock Marine	Demonstration zone and test areas to support the development of the marine energy sector
Swansea Campuses	Life science and sports science facilities at Swansea University Singleton campus and Morriston hospital

Digital Infrastructure	Ensuring access to full-fibre connectivity in the region's towns and cities, better rural broadband and supporting the region in taking advantage of the improvements in digital capacity.
Skills and Talent	Identifying the skills and training requirements to realise the benefits of the City Deal portfolio

Source: Swansea Bay City Deal

- 3.32 It can be seen from the list above that all but two of the City Deal projects and programmes are either principally located in the NGA, or will be delivered across the region (the remaining two – Canolfan S4C Yr Egin at Carmarthen and Pembroke Dock Marine – should also have region-wide impacts).
- 3.33 Building on the City Deal, the four regional local authorities approved a new South West Wales Regional Economic Delivery Plan (REDP), in early 2022. The REDP provides a framework for economic development across the region, and underpins a Regional Economic Framework adopted by the Welsh Government in conjunction with local partners [Reference: Welsh Government (2021), Regional Economic Framework for South West Wales (<https://gov.wales/sites/default/files/publications/2021-12/south-west-wales-regional-economic-framework.pdf#:~:text=The%20Regional%20Economic%20Framework%20for%20South%20West%20Wales%2C,more%20regionally-focused%20model%20of%20economic%20development%2C%20in%20accordance>)]. The REDP sets out three 'missions' to guide regional strategy, focused on "becoming a UK leader in renewable energy and the net zero economy"; "building a strong, resilient and embedded business base" and "growing and sustaining the South West Wales experience offer", including the opportunities presented by the visitor economy [Reference: South West Wales local authorities (2022), South West Wales Regional Economic Delivery Plan (<https://www.swansea.gov.uk/regionaleconomicdeliveryplan#:~:text=South%20West%20Wales%20Regional%20Economic%20Delivery%20Plan%20Covering,major%20study%20that%27s%20identified%20regional%20strengths%20and%20opportunities>)]. It also sets out a pipeline of projects, to be developed for investment over time. The REDP and the Regional Economic Framework both provide the strategic context for the new South West Wales Corporate Joint Committee, established in 2021 to provide a regional structure to drive forward sustainable strategic development.
- 3.34 In addition to the REDP, other relevant regional strategies include:
- The South West Wales Regional Energy Strategy, prepared in 2021/22. This sets out a pathway to deliver energy system decarbonisation. It notes the region's very high energy consumption (principally due to industrial

energy use, especially associated with steel production), and outlines priorities in relation to energy efficiency, on- and offshore electricity generation, heat and transport decarbonisation and the use of technology to develop smarter, more flexible systems.

- The South West Wales Employment and Skills Plan 2022-25 [Reference: South West Wales Regional Learning and Skills Partnership (2022), Employment and Skills Plan (<http://www.rlp.org.uk/SharedFiles/Download.aspx?pageid=2&mid=13&fileid=50>)]. This is the latest in a series of plans prepared by the Regional Learning and Skills Partnership to inform providers and the Welsh Government of future skills needs. The Plan especially highlights the need for advanced digital and 'green' skills, in the context of significant recruitment pressures on business.
- Looking across a wider spatial footprint, the South Wales Industrial Cluster (SWIC) programme was formed in 2019 with support from UK Research and Innovation to help plan a route to net zero for South Wales' substantial industrial and energy base, focused on specific projects that will reduce emissions and the development of a lower-carbon, circular, economy [Reference: See SWIC].

3.35 Across these regional strategies, there are common themes associated with a focus on decarbonisation and energy transition (especially important in South West Wales, given the region's significant low carbon energy potential and the high carbon intensity of much of its industrial base. There is a general recognition of South West Wales as a coherent region in policy terms, albeit extending beyond the implied geographic area of the NGA itself.

Local economic strategies

3.36 At local level, there is an extensive economic strategy base, much of which was updated during the Covid-19 pandemic:

- In Carmarthenshire, Transformations, the County Council's Strategic Regeneration Plan, was published in 2015. It highlighted investment in the three principal towns and at Cross Hands, as well as the 'Carmarthenshire Coastal Belt', providing strategic context for several major developments (such as Canolfan S4C Yr Egin) that have subsequently come forward. Subsequently, Moving Forward in Carmarthenshire, adopted by the previous County Council administration, described regeneration as the Council's "number one priority" and reconfirmed its commitment to deliver the priorities set out in Transformations [Reference: Carmarthenshire County Council, Moving Forward in Carmarthenshire: The next five years (<https://www.carmarthenshire.gov.wales/media/1212982/moving-forward.pdf>)]. During the Covid-19 pandemic, the Council commissioned an Economic Recovery and Delivery Plan for the county. This highlighted

opportunities in “advanced manufacturing, creative industries, green economy, health, care and life science and agriculture and food production”, and was accompanied by a series of Recovery Masterplans for the three principal towns (including Ammanford and Llanelli), and plans for the county’s network of ten smaller towns.

- In Swansea, ambitious plans for the regeneration of the city centre are set out in the Swansea City Centre Repurposing Strategy (2021) [Reference: Swansea Council (2021), Swansea City Centre Repurposing Strategy (<https://swansea.gov.uk/repurposingstrategy>)]. This builds on the 2016 Central Area Regeneration Framework, setting out a new approach to the future of the city centre in the light of changing retail and working patterns. More broadly, the Council adopted a new Corporate Plan for 2022/23. In relation to economic growth, the Corporate Plan sets out the goal of “transforming our economy and infrastructure, so that Swansea has a thriving mixed use City Centre and a local economy that will support the prosperity of our citizens”. The Council developed an Economic Recovery Action Plan in 2021 to support recovery of the local economy following the COVID-19 pandemic. The Council also adopted a Tourism Recovery Action Plan in 2021, recognising (as in other parts of the region) the importance of the hospitality sector.
- In Neath Port Talbot, the Council approved a new Corporate Plan, Recover, Reset, Renew, in 2022. This contains four themes within a ‘Strategic Change Programme’, with the aim of “creating the conditions for more secure, well paid and green work in the area” [Reference: Neath Port Talbot Council (2022), Recover, Reset, Renew: Corporate Plan 2022-27, p.45 (<https://www.npt.gov.uk/media/17199/corporate-plan-2022-27-recover-reset-renew.pdf?v=20220422124059>)]. Alongside the Corporate Plan, the Council has also developed an Economic Recovery Plan, which seeks to build on the recovery from the Covid-19 pandemic to “grow our business community, support sustained employment and progression in work, and increase productivity and pay over the long term” [Reference: Neath Port Talbot Council [SQW] (2022), Economic Recovery Plan]. The Plan notes the strength of the existing industrial base and the potential for leadership in the transition to a low-carbon economy, highlights the scale and employment potential of NPT’s major sites, and sets out the need to promote economic opportunity throughout the county borough, including within the Valleys.
- In Pembrokeshire, the Council published a ‘Recovery and Regeneration Strategy 2020-2030’. This strategy combined the Council’s economic restart and recovery plans in response to the Covid 19 pandemic with its longer term renewal and regeneration approach. It sets out the Council’s ambitious plans to move to a stronger economic position than pre-Pandemic, with this including objectives which will see the creation of new clean, green engineering jobs focussed around the Milford Haven

Waterway and continued improvements to key infrastructure, including the provision of universal access to high quality broadband by 2023. The importance of sustaining the transformation and regeneration of key towns and specifically their town centres is also recognised, with this identified as being necessary to attract workers in knowledge and creative economies. The Strategy also references the ongoing work with Milford Haven Port Authority to help secure Free Port status for Milford Haven, which as referenced elsewhere in this report has progressed to the submission of a joint bid with NPT.

- 3.37 Across this local strategy base, three common themes are worth highlighting. First, the commitment to supporting sustainable economic growth within the regional framework set out earlier: in all four authorities, substantial work has been done to revise plans in the light of the Covid-19 pandemic and to prioritise economic recovery. Second, a focus on town and city centres, which is developed further at more local level through (for example) Carmarthenshire's town recovery masterplans. Third, the growing focus, consistent with regional and national strategy, on decarbonisation and energy transition, which is again reinforced through a series of specific thematic strategies at local level (such as NPT's Decarbonisation and Renewable Energy (DARE) Strategy).

Funding programmes

- 3.38 Historically, the economic development and regeneration plans adopted at regional and local level have been closely associated with strategic sources of investment (for example, the 2013 Swansea Bay Economic Regeneration Strategy helped to inform the City Deal process). Recent years have seen a significant shift in the regeneration funding landscape, as European funds (from which the region has benefited significantly) draw to a close. However, there has been regional cooperation in preparing an Investment Plan for future UK Shared Prosperity Fund allocations and, at the time of writing, several capital Investment proposals had been submitted to the UK Government's Levelling Up Fund.
- 3.39 The area also incorporates an Enterprise Zone at Port Talbot Waterfront, designated by the Welsh Government. This is closely linked with Port Talbot's manufacturing focus and capacity for growth, and is referenced further in Chapter 5.

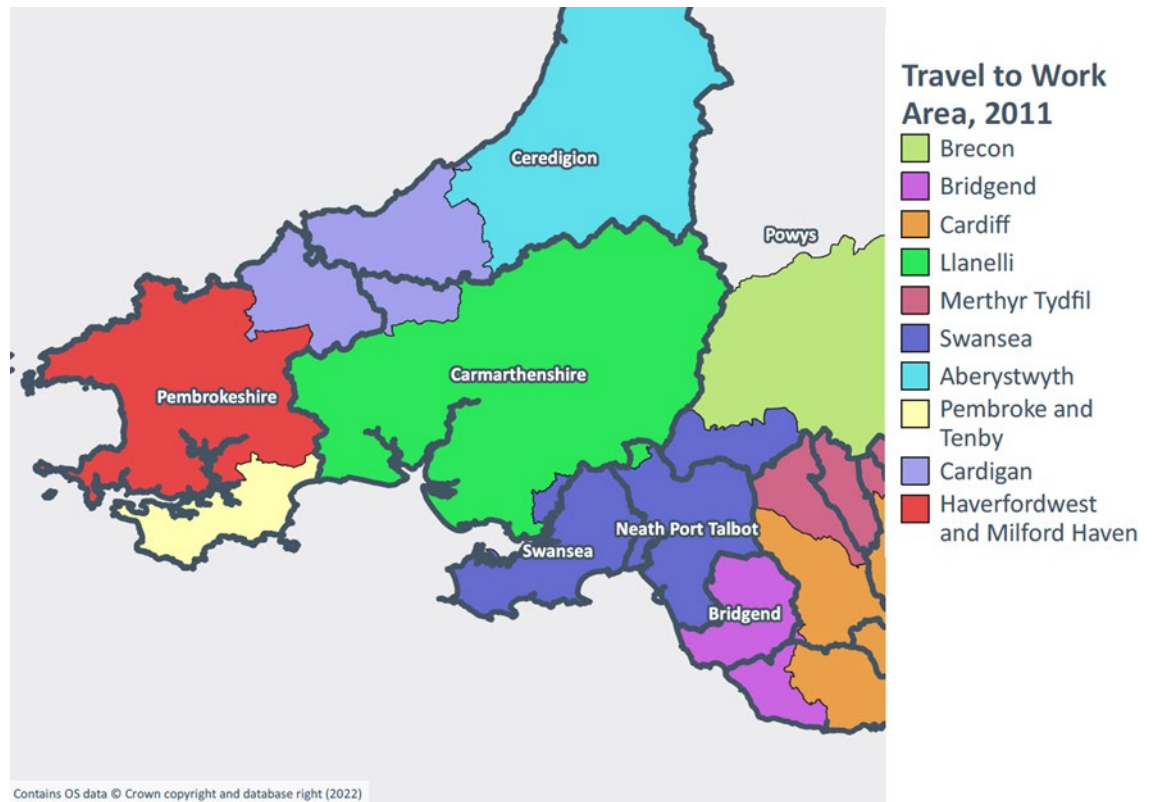
Evidence of functional spatial geographies

- 3.40 Whilst the process of developing an SDP has not formally commenced the implications of the NGA and its spatial definition will be a consideration in the development of the spatial strategy at this larger than local geography. Whilst the above highlights evidence of shared economic strategies across the region and in other combinations of the authorities to date there is limited recent evidence explicitly seeking to understand the current functional relationships between authorities and across the area, largely because of plan-making being undertaken within existing administrative areas. Where such evidence will no

doubt be prepared to inform the SDP, this section provides a brief consideration of the available published analysis of functional geographies across the area or informing statistical definitions.

- 3.41 At the time of writing and in advance of the SDP evidence base there are no up-to-date evidenced attempts to define either Functional Economic Market Areas (FEMAs) or Strategic Housing Market Areas (HMAs) across South West Wales, noting these are not explicitly required under relevant guidance in Wales. The individual authorities have, however, previously and continue to recognise the strength and nature of functional relationships between the administrative areas to understand the implications of their respective Local Development Plans. This has included the publication of multi-authority studies, with the authorities continuing to build upon this work in the evidence informing their current emerging RLDPs. It is understood that in progressing evidence to inform the SDP that the analysis presented in these studies will continue to be reviewed and updated accordingly.
- 3.42 In the absence of defined functional geographies high-level consideration has been given to existing statistical definitions or informing indicators of need and their spatial presentation.
- 3.43 In terms of travel-to-work areas, Figure 3.2 shows that the whole of the city and county of Swansea and the majority of NPT are within the Swansea TTWA, as defined based on the 2011 census. The Swansea TTWA also extends slightly further north, to the southwestern part of Powys, around Ystradgynlais. The Llanelli TTWA whilst including a small part of NPT covers most of Carmarthenshire, and includes Ammanford and Cross Hands, as well as extending westwards to cover Carmarthen and its hinterland. The Haverfordwest and Milford Haven as well as Pembroke and Tenby form the TTWA's in Pembrokeshire. This is illustrated in Figure 3.2.

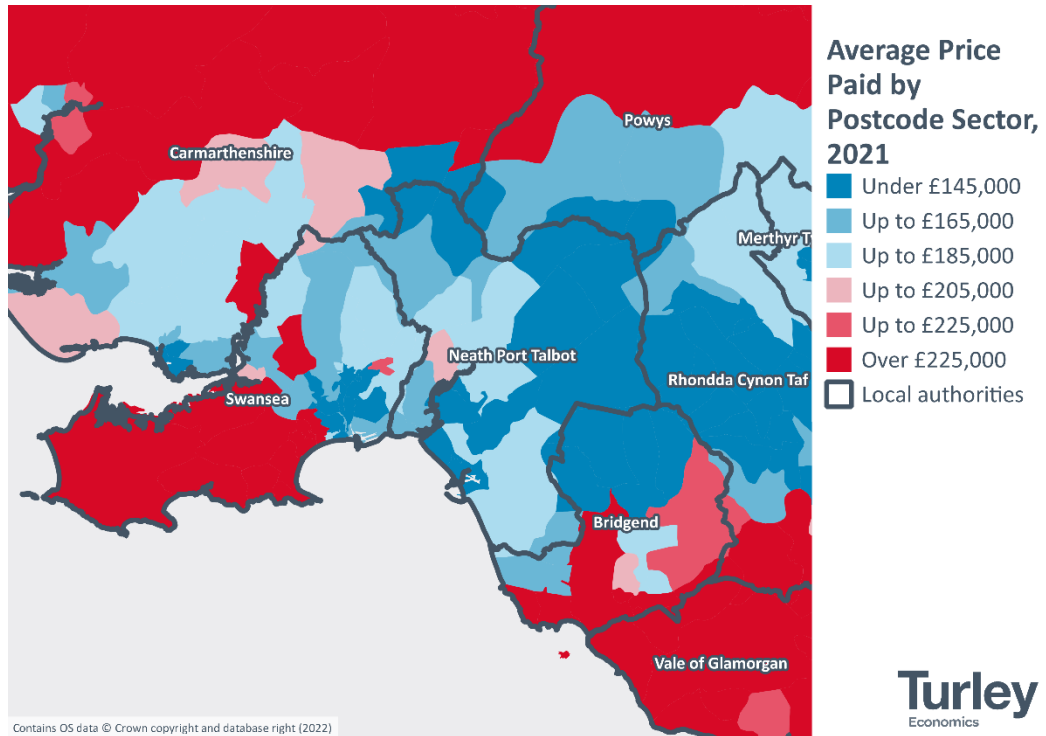
Figure 3.2: Travel to Work Areas 2011



Source: ONS

- 3.44 House prices are an indicator of market demand and a symptom of housing market conditions with regards to the comparative balance between housing supply and demand. Figure 3.3 presents Land Registry data to establish the average price paid in different postcode sectors.

Figure 3.3: Average Price Paid by Postcode Sector [Reference: Categories defined relative to the average price of circa £187,258 across the six authorities as a whole, rounded down to the nearest £5,000] (2021)



Source: Land Registry; Turley analysis

- 3.45 The mapping of prices, focussing on the core of the study area around Swansea, shows a large area of broad commonality of comparatively low prices. This area stretches further east but with a clear spatial break into the more rural parts of Swansea and Carmarthenshire and into Pembrokeshire. In each of the latter there are smaller islands of lower prices in many of the smaller settlements.

Local planning policy

- 3.46 Subsequent sections of this report consider in more detail the spatial implications of current and emerging policy approaches to the planned accommodation of growth and the settlement hierarchies in adopted LDPs. This section provides an overview of the current LDPs across the study area to provide context to this more detailed analysis.

Swansea

- 3.47 The Swansea LDP 2010-2025 was adopted on the 28th February 2019. It identifies itself as promoting a strong Placemaking agenda, representing a positive approach to managing and promoting growth, and to delivering the supporting infrastructure required to underpin the transformative change that Swansea is anticipated to experience as the city at the heart of the Swansea Bay Region.

3.48 Plan policies for growth are predicated on the evidenced potential to deliver 13,600 jobs over the plan period and an anticipated projected significant increase in population and households. This underpins the provision of land to match an identified requirement to deliver 15,600 homes and a requirement for 19ha of employment land to accommodate the potential economic growth likely to be associated with the impact of the City Deal. It is recognised that provision on this scale would represent a significant uplift from past levels of delivery. The spatial strategy for accommodating growth is predicated on the identification of a limited number of sustainable new neighbourhoods at Strategic Development Areas (SDAs) within or close to the existing urban areas along with a number of non-strategic medium scale edge of settlement extensions and more dispersed and smaller allocations to round off settlements.

Carmarthenshire

- 3.49 The Carmarthenshire LDP was adopted on the 10th December 2014 and was intended to guide development up to 2021. Evidence considering in detailed projected population and household growth was used to identify a housing requirement of 15,197 dwellings over the plan period. Further economic evidence was used to justify the allocation of 111.13 ha of employment land.
- 3.50 The accommodation of growth is based on a spatial strategy which is intended to consolidate the existing spatial settlement pattern and allows for support, retention and continued provision of viable facilities, services and employment opportunities at accessible and appropriate locations. It is also intended to enable the development of sustainable local economies. This sees the focus of the distribution of housing and employment provision in the established urban centres of Llanelli, Carmarthen and the Ammanford/ Cross Hands grouping of settlements. It confirms that the focus on these settlements as 'Growth Areas' reflects their respective standing and their sustainability and accessibility attributes. It observes that these Growth Areas exhibit good accessibility through connections to the strategic highway network and the rail networks as well as public transport.
- 3.51 In 2018 Carmarthenshire started work on its RLDP and subsequently consulted on the Deposit RLDP in 2019/2020. Progress on the RLDP then halted due to the unforeseen publication of new targets to reduce river phosphate levels in special areas of conservation across Wales by NRW in January 2021, which placed significant restrictions upon development in parts of the County. Progress is being made to address these issues and the local planning authority are currently preparing a second deposit RLDP. The second deposit plan will seek to retain Carmarthen, Llanelli and Ammanford / Cross Hands as the areas which will receive the highest level of housing and employment provision reflective of their sustainability credentials.

NPT

- 3.52 NPT's LDP was adopted in January 2016. The document sets out the Council's vision and objectives, together with a series of policies and proposals which together sets the framework for the development and use of land in the county borough 2011-2026.
- 3.53 The LDP provides for a housing requirement of 7,800 homes with this based on an economic-led scenario assuming the growth of 3,850 jobs, which it confirms complements the approach taken by the City and County of Swansea. A total of 96 ha of land is also allocated for employment uses, which it observes includes space to accommodate the needs of the energy sector and ancillary facilities and services.
- 3.54 The LDP observes that the chosen economic-led scenario is aspirational in its approach, aiming to maximise job growth within the local economy. The relationship with housing need is acknowledged with a recognition that the level of housing identified as being needed is mainly driven by the reduction in average household size whilst also encouraging an element of migration into the County ensuring it becomes more independent and less reliant on outside sources of labour by improving the economic activity rates of residents.
- 3.55 Spatially the LDP focusses development along the coastal corridor and in the urban areas of Neath and Port Talbot, whilst identifying Pontardawe and the Upper Neath Valley as strategic growth areas in the valleys communities.

Pembrokeshire

- 3.56 The Pembrokeshire LDP was adopted on the 28th February 2013. It provides for 7,300 new homes to deliver a need for 5,700 homes, recognising projections at the time which indicated that the population of the authority was anticipated to grow because of significant net immigration. Provision is also made for 173 hectares of employment land, with recognition of the importance of supporting the future development of port and energy related activities in proximity to the Milford Haven Waterway, with several strategic employment sites identified in proximity. The Plan includes a settlement strategy which aims to achieve a balanced distribution between urban and rural Pembrokeshire.

Summary

- 3.57 The Outcomes set out in Future Wales underline the importance placed on the sustainable accommodation of growth. This includes a focus on the concentration of new development within towns and cities, with sustainable travel options which mitigates environmental impacts, and promotes climate-resilience.
- 3.58 The identification of three NGAs, including Swansea Bay and Llanelli enforces this spatial strategy and provides an important insight into their geographical definition. Importantly in the context of the SBLNGA Future Wales is clear that this geography has been identified due to it being the main existing centre of

population, jobs and services as well as the existing infrastructure connections which connect it to other economic centres and facilitate sustainable self-containment of movements. Importantly it also recognises that this area has the opportunity to sustainably absorb future strategic economic and housing growth, including new employment opportunities in advanced manufacturing and transport.

- 3.59 A clear distinction is made, in this regard, to the rationale for the definition of areas of regional growth, which by contrast whilst being key centres of existing employment, services, retail and culture are to be a focus of managed growth which enables them to sustain and support their own population and communities around them.
- 3.60 The review of available published plans and strategies has also been directly considered in the presentation of the spatial analysis in the proceeding sections, with this considering for example existing transport plans at the regional level as well as investment and economic strategies and the spatial distribution of growth planned for within LDPs.

4. Current socio-economic spatial context

4.1 The previous section importantly affirmed the definitional socio-economic considerations in Future Wales as recognising that the NGA:

- is the main existing centre of population, jobs and services and infrastructure connections;
- can accommodate and absorb future strategic economic and housing growth sustainably; and
- will be the recipient of investment in infrastructure

4.2 This section considers the first of two spatial justification components using GIS and wider analysis to build a greater understanding of the implications for ensuring that any geographical definition accurately reflects existing concentrations and the implications for accommodating future growth sustainably. It considers:

- the current distribution of population, employment and economic output across the area;
- the settlement hierarchy within the planning context, alongside some wider considerations of settlement distribution;
- existing transport connections and infrastructure; and
- key assets, in relation to education, research and innovation; the industrial and business stock; and cultural provision.

Population, employment and output

Population

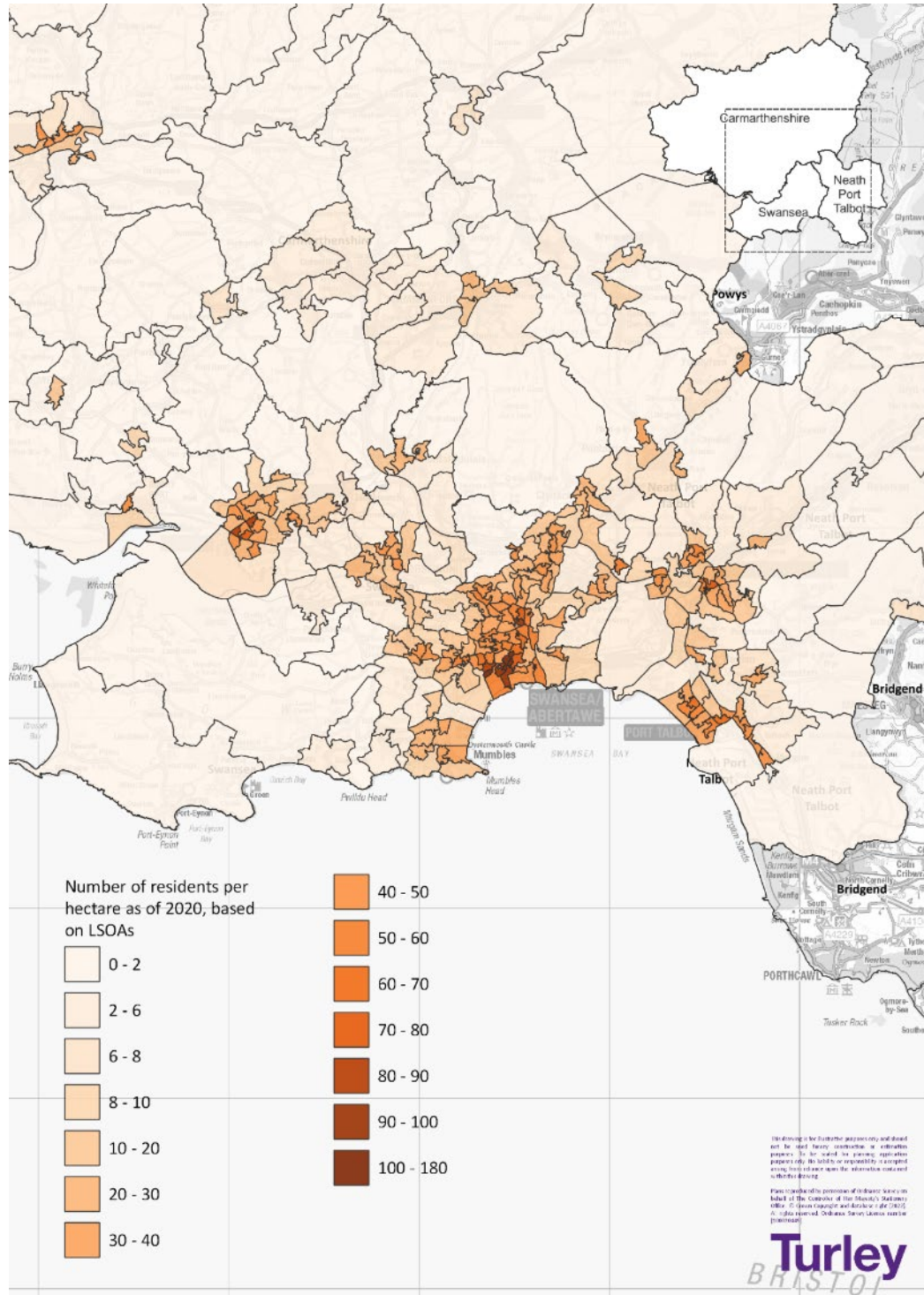
4.3 Figure 4.1 shows the number of residents per hectare in each LSOA [Reference: Lower-level Super Output Area – Census defined geographic area] using the latest 2020 population estimates [Reference: It is noted that the outputs of the 2021 Census are not available at the time of this report’s production. These will provide an updated count of people, noting that the official datasets used are estimates with the last count recorded using the 2011 Census.]. This shows the relative density of resident populations across the area.

4.4 The map shows a concentration of population spreading out from the centre of Swansea. Relatively dense concentrations of population are also apparent in Llanelli, Port Talbot and Neath in particular.

4.5 It is of note that the coastal area contains more densely populated neighbourhoods, reinforcing the current concentration of people within this

geographical area where densities quickly reduce in all but a few neighbourhoods in the surrounding areas.

Figure 4.1: Population density – number of residents per hectare (2020)

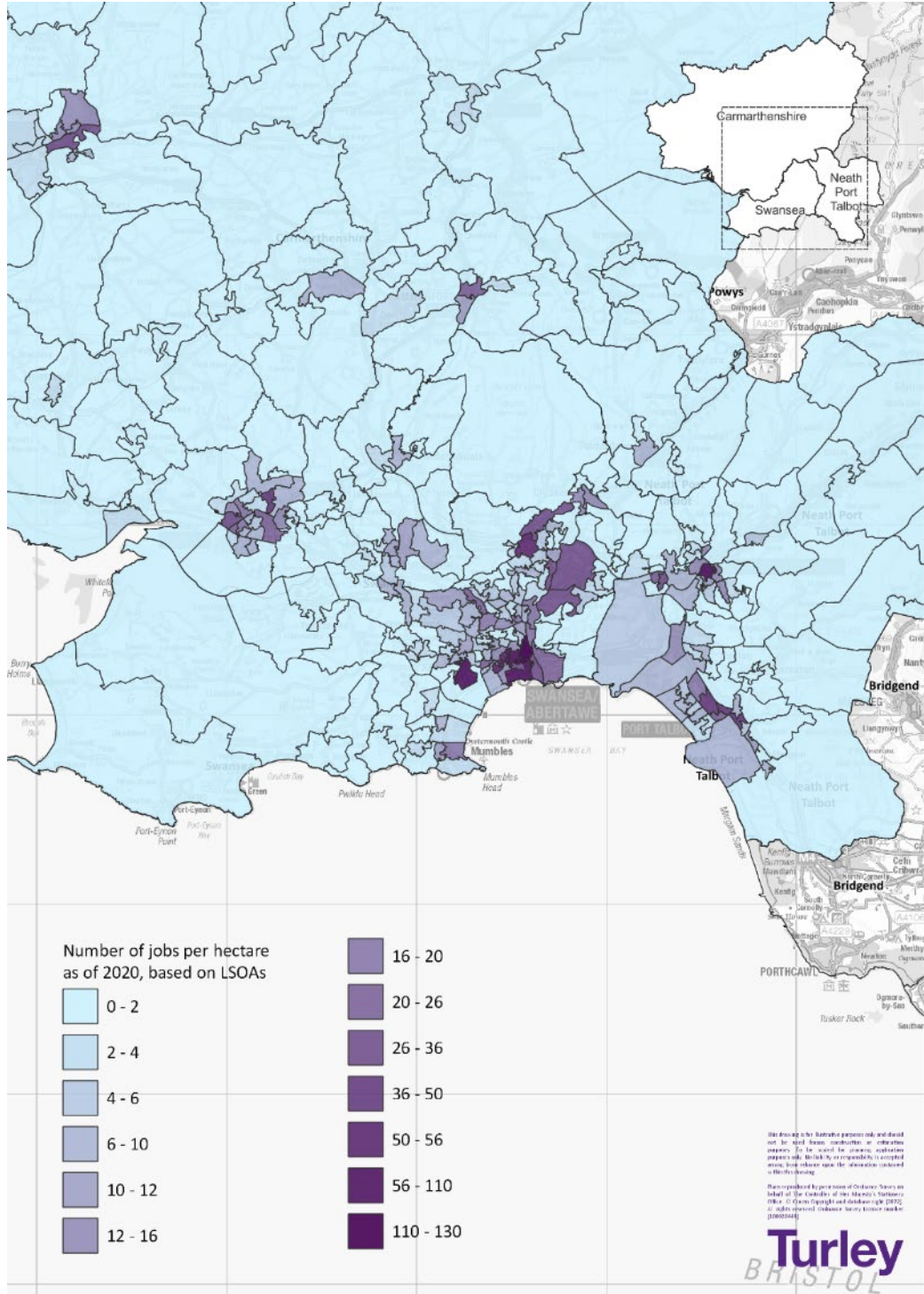


Employment

4.6 Where concentrations of jobs or employment represent another key determinant based on Future Wales, Figure 4.2 shows the number of jobs per

hectare, again broken down by LSOA and using the latest data available from 2020 [Reference: Sourced from the Business Register and Employment Survey].

Figure 4.2: Employment density – number of jobs per hectare (2020)



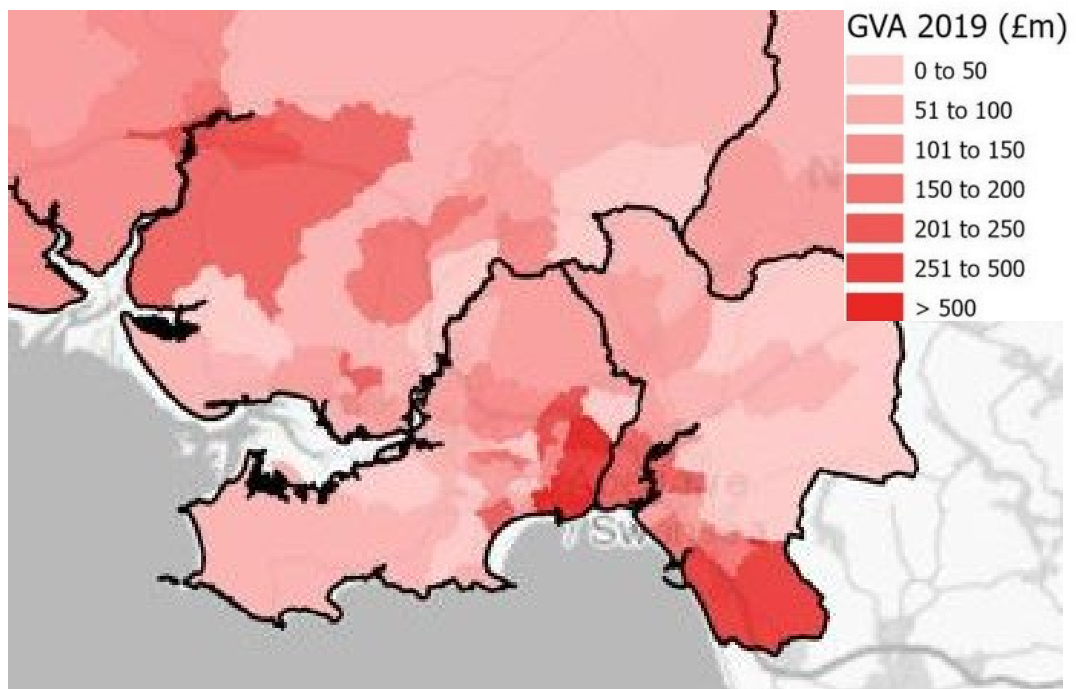
4.7 This shows a markedly similar geographic picture to the population mapping, reassuringly highlighting the sustainability of the alignment of jobs and homes. There are some exceptions which are of note including, concentrations of employment to the northern parts of the urban area of Swansea which reflects

proximity to junctions on the M4. The concentration of jobs at Port Talbot also stands out more significantly than the concentration of population reflecting the scale of the Tata Steel works and other surrounding employment uses. Beyond Swansea and Port Talbot, concentrations of employment mainly align with the urban distribution, where Neath and Llanelli are identifiable.

Economic output

- 4.8 It is also possible to map concentrations of output at local level, using the Office for National Statistics' UK Small Area GVA Estimates. Unsurprisingly, this tracks the population and employment mapping, with the principal concentrations extending from Margam through to central and northern Swansea, and with smaller concentrations around Llanelli and the Cross Hands area, as Figure 4.3 illustrates.

Figure 4.3: Local concentrations of GVA



Source: ONS (2021), Small Area GVA Estimates; SQW analysis

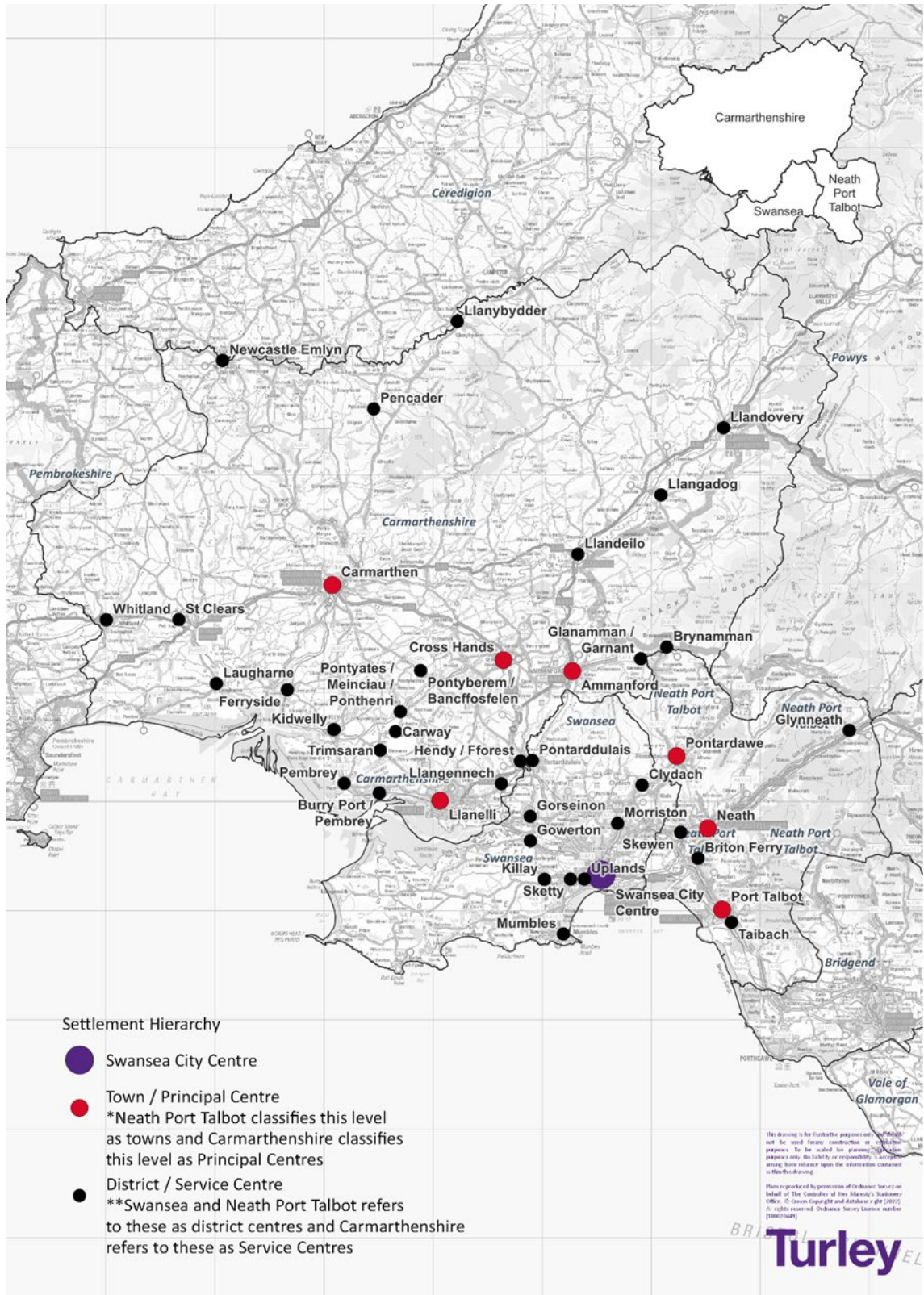
The settlement hierarchy

- 4.9 In considering the current settlement hierarchy across the study area it is important to observe the national policy context through which this is established. Policy 6 of Future Wales is predicated on a 'Town Centre First' approach. This asserts that significant new commercial, retail, education, health, leisure and public service facilities must be located within town and city centres. The policy states that they should have good access by public transport to and from the whole town or city and, where appropriate, the wider region.
- 4.10 PPW further develops this by stating that planning authorities should adopt a sequential approach to the selection of new sites in their development plan and

when determining planning applications [Reference: Planning Policy Wales, Paragraph 4.3.18].

- 4.11 As part of the refinement of the spatial extent of the NGA , consideration therefore needs to be given to the hierarchy of settlements within the region, notwithstanding that these are policy designations that will be reviewed as part of the preparation of RLDPs.
- 4.12 Figure 4.4 shows the current designations of settlements, seeking to provide some alignment in descriptions of the various hierarchies.

Figure 4.4: Currently defined settlement hierarchy – adopted LDPs



- 4.13 In considering Figure 4.4, it is evident that Swansea is the main urban centre, acknowledged in its existing LDP and reflecting its status as a city. There is no further stated hierarchy classifying other parts of the urban area, with the spatial strategy formed of three elements; the urban area, identification of key villages outside of this main urban area; and the open countryside. Policy PS1 of the LDP directs development to within the settlement boundary of the urban area of Swansea and key villages. The LDP defines the 'urban area', which consists of Swansea itself and settlements including Mumbles, Pontarddulais, Gorseinon, Gowerton and Clydach (all of which are defined as 'district centres'). It is the case that the county of Swansea also contains an extensive rural hinterland to the north and west, and not all of the defined 'urban area' is contiguous: Policy ER3 of the LDP defines a series of 'green wedges' to prevent coalescence.
- 4.14 In NPT the scale and 'offer' of the larger settlements of Neath (including Melincryddan), Port Talbot (including Velindre) and Pontardawe (including Trebanos, Rhydyfro and Ynysmeudwy) are recognised in their designation as 'Towns' within the hierarchy. Briton Ferry, Skewen, Taibach and Glynneath (including Pontwalby) are classified as District Centres. The subsequent tier of 'Large Local Centres' are not included on the Plan but evidently have their own more local role in the hierarchy. The strategy set out in the NPT LDP distinguishes between a 'Coastal Corridor' spatial strategy area, including Port Talbot and Neath; and a 'Valleys' strategy area, including Pontardawe, Glynneath and the rural hinterland.
- 4.15 In Carmarthenshire the Deposit RLDP uses a Tier classification which identifies clusters of settlements. The settlements of Carmarthen, Llanelli and Ammanford/ Cross Hands are identified as Tier 1 Principal Centres. Other smaller settlements are classified as Service Centres. The Deposit RLDP also identifies six 'clusters' of settlements across the county: of relevance to the NGA, these include Llanelli and the Southern Gwendraeth area, which is noted as of "strategic importance not only to Carmarthenshire but also regionally and nationally", and Amman and the Upper Gwendraeth, noted as a key focus for investment in jobs, homes and services.
- 4.16 Beyond the settlement hierarchy as set out in adopted and emerging LDP as described above, it is relevant to note the Office of National Statistics' definition of 'Built Up Areas' [Reference: Built Up Areas are defined as land with a minimum area of 20 hectares, where settlements within 200 metres of each other are linked.] (BUAs). The ONS defines 8 larger Built Up Areas, consisting of a number of subdivisions. By far the largest of these is Swansea, which extends to include most of the coastal part of NPT, highlighting the close connections across this part of Swansea Bay. The other larger BUAs are Llanelli, Ammanford and Gorseinon, with the remainder smaller settlements. Table 4.1 sets out the population of each BUA and its component subdivisions:

Table 4.1: Larger Built-Up Areas and subdivisions (population over 5,000)

Built Up Area	Subdivisions	Est.pop 2020
Swansea	Glais	861
Swansea	Gowerton	8,151
Swansea	Neath	51,581
Swansea	Pontardawe	13,330
Swansea	Port Talbot	38,134
Swansea	Swansea	185,033
Swansea	Upper Killay	1,323
Swansea	Ystradgynlais	10,670
Swansea BUA	Total	309,083
Llanelli	Llanelli	45,551
Llanelli	Llangennech	4,313
Llanelli	Pwll	1,348
Llanelli	Llanelli BUA total	51,212
Ammanford	Ammanford	8,610
Ammanford	Pen-y-groes (inc. Cross Hands)	6,465
Ammanford	Penybanc	1,115
Ammanford	Saron	922
Ammanford	Tumble	4,333
Ammanford	Tycroes	3,775
Ammanford BUA	Total	25,220
Gorseinon	Gorseinon	17,340
Gorseinon	Loughor	5,014
Gorseinon BUA	Total	22,234
Pontarddulais	Pontarddulais	9,757
Burry Port	Burry Port	6,061
Burry Port	Pembrey	2,007
Burry Port BUA	Total	8,068
Gwaun-Cae-Gurwen/ Brynamman	Brynamman	2,634

Gwaun-Cae-Gurwen/ Brynamman	Gwaun-Cae-Gurwen	3,130
Gwaun-Cae-Gurwen/ Brynamman BUA	Total	5,764
Glynneath	Blaengwrach	1,146
Glynneath	Glynneath	4,195
Glynneath BUA	Total	5,341

Source: ONS, Population Estimates for Small Areas

- 4.17 It should be noted that in some cases, the extent of the ‘larger BUA’ extends some way beyond the ‘core’ settlement: for example, Neath and Port Talbot are clearly distinct settlements from Swansea, and Ystradgynlais (included as a subdivision of the Swansea BUA) is in Powys, beyond the boundary of the three authorities within the NGA, and a substantial distance from Swansea itself. But the BUA definition provides another (externally-derived) way of looking at the area’s urban geography and the connections between urban centres.

Connections and infrastructure

Transport infrastructure

- 4.18 Appreciating the important role that existing infrastructure plays in facilitating both the movement of people and concentrations of communities around key hubs, Figure 4.5 shows the key transport infrastructure across the area, including nodal points (stations, junctions etc).

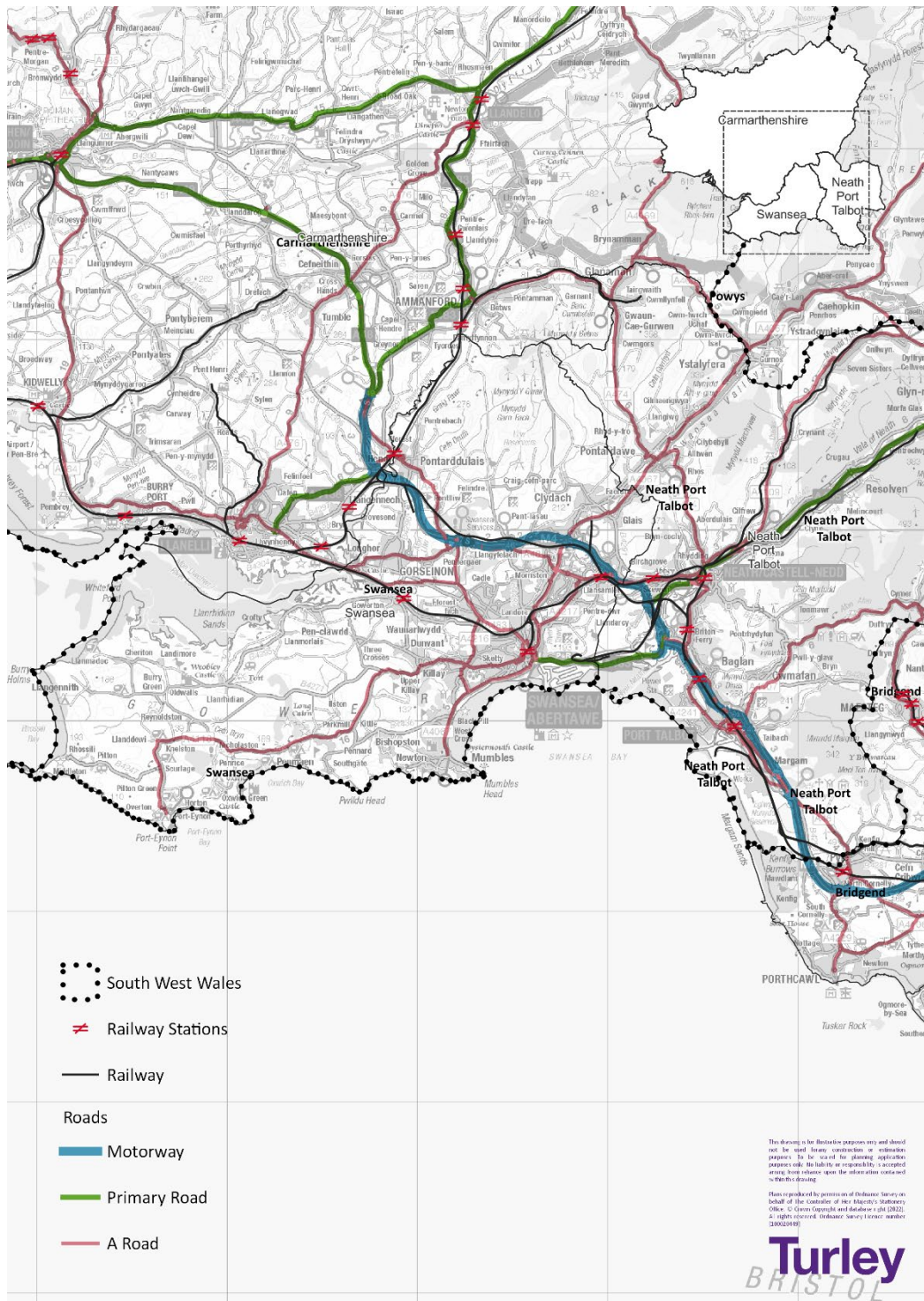
- 4.19 This shows:

- The important east-west passenger rail links running along the coastal corridor with the South Wales Main Line connecting Port Talbot, Neath, Swansea, Gowerton, Llanelli and Burry Port (and providing connectivity to Cardiff and London) and the Heart of Wales Line extending north to Pontarddulais and Ammanford;
- Rail freight connections which play an important role in reducing distribution by road. These include four cargo lines in NPT: The Onllwyn line from Neath (Jersey Marine), Vale of Neath to Cwmgwrach, Dulais Valley to Onllwyn, Amman Valley – Ammanford to Tairgwaith. Lines also operate between Swansea Docks via Jersey Marine and River Neath Wharves and between Port Talbot and the Global Centre for Rail Excellence in NPT / Powys (further information on this planned investment is considered in section 5); and
- The strategic road network, specially including the M4 which navigates around the main urban area from Port Talbot, connecting the most northerly parts of Swansea. Llanelli and Neath are connected to the M4 by

the A4138 and A465 respectively; while the A465 also extends connectivity from Neath and the M4 to the Heads of the Valleys, the M50 and the English Midlands. The M4 corridor extends west along the A48 from Pont Abraham, via Cross Hands, Carmarthen and on to Pembrokeshire and its ports. There is also a northerly road connection from the end of the M4 at Pont Abraham along the A483 to Ammanford and beyond to mid wales.

- 4.20 Major transport investment in recent years has included improvements to the Fabian Way corridor linking NPT and Swansea; and improvements to the road network around Ammanford and Cross Hands, and the development of the major transport hub at Port Talbot Parkway. Further details are provided with regards ongoing investment in transport infrastructure schemes in section 5 but it is noted here that beyond the proposed NGA itself, the dualling of the Heads of the Valleys road (A465) east of Hirwaun will improve connectivity from Swansea Bay to the Midlands.
- 4.21 The mapping reveals an 'inverted T' created by the key strategic transport routes, including rail connections, along the coastal area and then up the M4/northern rail link. It is worth noting however, the relatively weak transport connections across Valley communities and between smaller Valley settlements and the larger coastal conurbations, given the absence (other than on the Heart of Wales line) of north-south passenger rail connections.
- 4.22 The area's port infrastructure is also of wider regional and national significance. Both the Port of Swansea and the Port of Port Talbot are owned by Associated British Ports (ABP): Port Talbot is especially significant as a major deep-water port, one of only 3 such in the UK. The development opportunities associated with the ports are discussed later in this report.

Figure 4.5: Strategic transport infrastructure

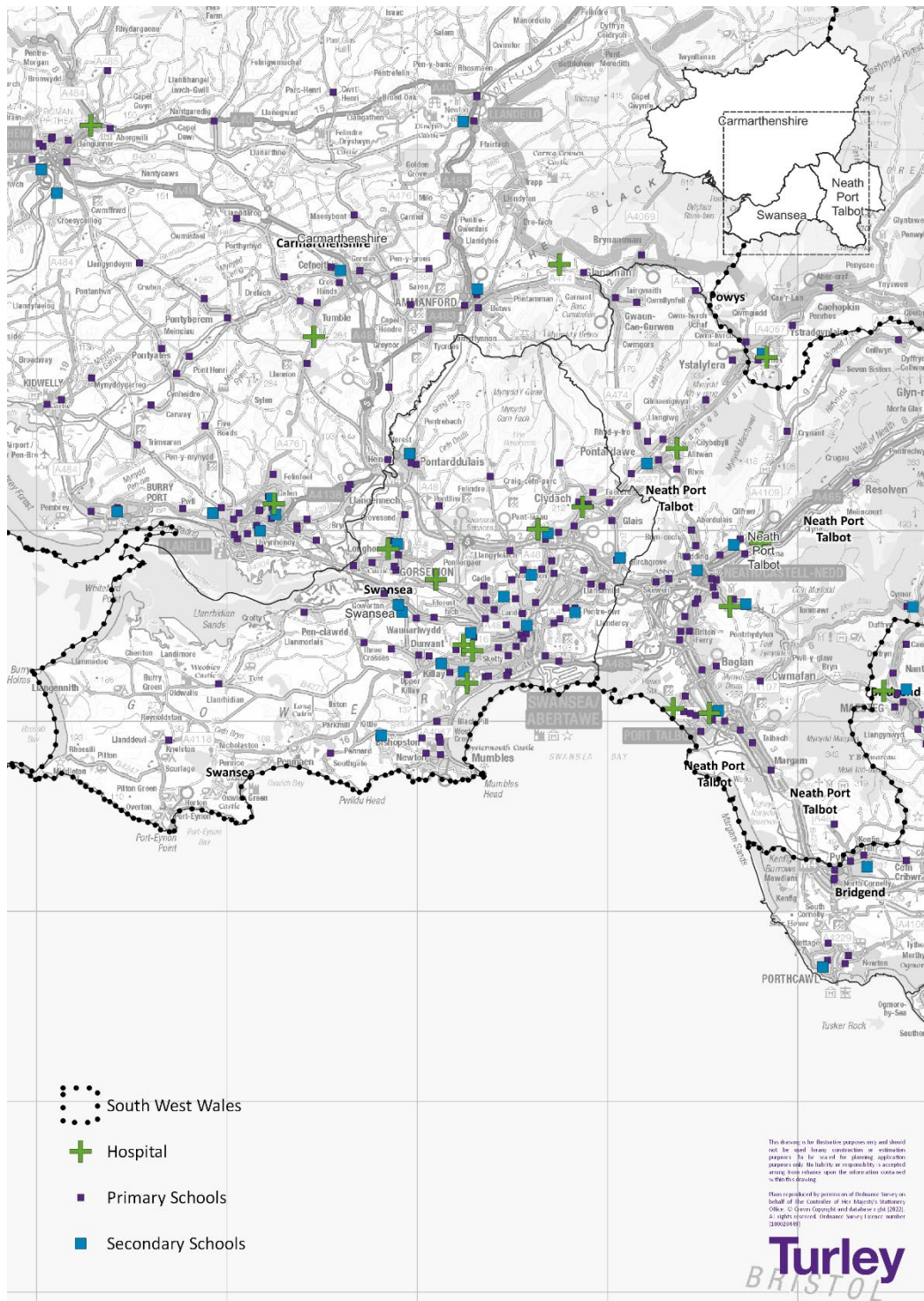


Public service infrastructure

4.23 Figure 4.5 highlights the concentration of schools, particularly secondary schools within the main coastal urban area. It is noted that secondary schools outside of this area are more disparate following the settlement pattern.

4.24 The geography is covered by two different health boards, Hywel Dda and Swansea Bay. Major hospital provision is located along the coastal strip, with the area's only major accident and emergency and major acute hospitals (Morrison and Singleton respectively) both located in the wider urban Swansea area.

Figure 4.6: Public service infrastructure



Key economic assets

4.25 This sub-section considers the spatial distribution of key economic assets, looking at education, research and innovation facilities, business and industrial stock and cultural and leisure assets.

Higher and further education

4.26 Where the analysis above considered schools, Universities and colleges evidently have a larger footprint in terms of their students. They also act as important economic catalysts given their focus on research and important opportunities for productive links with businesses.

4.27 The main university provision is offered by Swansea University and University of Wales Trinity St David:

- Swansea University is based on two main sites: the long-established Singleton Campus in urban Swansea, and the more recent Bay Campus, located on Fabian Way in NPT. The Bay Campus involved the major redevelopment of a former petrochemicals site and substantially expanded the University's provision.
- University of Wales Trinity St David operates from three major locations in South West Wales (at Swansea, Carmarthen and Lampeter). The Swansea campuses are located in the city centre, with major investment in the SA1 Waterfront development and Swansea Business Campus in recent years.

4.28 In addition, there are several specialist higher education research institutions in the area, all of which are located in Swansea and the coastal part of NPT. These include Swansea University's Institute of Life Science (located between the Singleton Campus and Singleton Hospital), and a series of specialist institutions in NPT focused on energy and industrial decarbonisation, the largest of which is the University of South Wales Hydrogen Centre at Baglan [Reference: Other institutions include the Gas Turbine Research Centre (Cardiff University, Margam); and the Solar Heat Energy Demonstrator (Swansea University, Margam)]. Planned future university investment includes the development of the SWITCH industrial research facility in Port Talbot and university-led research provision at the forthcoming Pentre Awel development in Llanelli and the proposed Global Centre for Rail Excellence at Onllwyn (discussed further below). Historically, there have been strong links between Swansea University and UWTSD and industry within the area, as demonstrated both by this series of industrial research facilities and by the operation of a number of university-led regional innovation programmes [Reference: For example, the ASTUTE 2020 programme delivered by Swansea University.].

4.29 Further education is offered by Coleg Sir Gâr (with campuses at Graig, just west of Llanelli; and at Ammanford [Reference: As well as at Carmarthen and with an agricultural college near Llandeilo]); Gower College (with facilities in Swansea and Gorseinon); and NPTC Group of Colleges (with its main facilities at Margam,

Neath and Pontardawe; specialist sites in Llandarcy, Maesteg and Swansea, Newtown and Brecon Beacons Colleges in Powys and plans to develop a new campus in Port Talbot). Swansea College also has a large sixth-form offer.

- 4.30 Two observations are worth making on the current geography of higher and further education provision. First, there is a dense concentration of university assets, which straddle Swansea and NPT, are internally integrated and which have expanded in recent years. Second, institutionally, there are important connections to the wider region: for example, UWTSD and Coleg Sir Gâr form part of the same group and have a significant footprint across South West Wales and beyond and the NPTC Group of Colleges extending north into Mid Wales. While there is a visible concentration of assets along the Swansea Bay and Llanelli coast, integration with the wider hinterland is important.

Key business and industrial assets

- 4.31 The broad NGA area shares a common industrial heritage, historically linked with the coal, metals, engineering and petrochemicals industries. The legacy of these remain important, both in the engineering strengths of the higher education offer highlighted above, and in the relative scale of manufacturing employment and output, especially in NPT and Llanelli. Key assets with links and relationships across the area include:

- A continuing large presence in the steel industry and its supply chain, linked with Tata's major works at Port Talbot (and its specialty steel facility at Trostre in Llanelli). Tata maintain research and development facilities at Harbourside in Port Talbot, which will be augmented by Swansea University's planned SWITCH centre.
- A wider manufacturing base that includes strengths in the automotive sector (e.g. Gestamp Tallent and Marelli Automotive at Llanelli); and (especially around Port Talbot) a number of energy-intensive uses, including steel and cement and a diverse range of manufacturing activities [Reference: Including paper, finished metal products, specialist coatings and sealants within a wide range of industries.]. While manufacturing employment in the area fell substantially in the 1980s (and experienced further contraction in the early 2000s), it has been resilient in recent years. As noted above, the general manufacturing sector is supported by a university research base (e.g., the Materials Research Centre and Materials and Manufacturing Academy at Swansea University), as well as by private sector research and development assets (most prominently TWI at Port Talbot).
- A concentration of activity in the food production sector, notably around Cross Hands (home to Castell Howell Foods, a major manufacturer), and linked with aspirations to develop a food manufacturing park.

- 4.32 There are also emerging strengths in:

- Energy linked with the area’s concentration of energy-intensive industry, existing hydrogen production and research capabilities and scope for significant expansion of offshore energy generation (discussed further below).
- Data and digital technology, including Swansea University’s significant strengths in computing and the recent growth of software development and business services (for example Keytree and Vizolution) and some creative digital assets (for example Tinopolis at Llanelli). It is also worth noting the major presence of the DVLA at Swansea, which describes in its strategy its vision of being a “dynamic, digital organisation” and which is a substantial investor in data science and cybersecurity [Reference: DVLA (2021), Strategic Plan 2021-24 (<https://www.gov.uk/government/publications/dvla-strategic-plan-2021-to-2024/dvla-strategic-plan-2021-to-2024>)].
- Life sciences, partly driven by the development of the Institute of Life Sciences in Swansea and the active involvement of NHS institutions in driving demand for new products and services (for example via the ARCH regional collaboration led by the Swansea Bay and Hywel Dda University Health Boards).

4.33 Looking across this snapshot of industrial activity, there is evidence of linkages across the Swansea Bay and Llanelli area, and significant alignment between the area’s research and industrial strengths. There are also important links beyond the immediate vicinity: for example, ABP’s emerging plans for future port development extend to their assets in Cardiff and Newport, as well as at Port Talbot and Swansea, while the South Wales Industrial Cluster (SWIC) programme (referenced earlier) seeks to develop a plan for industrial decarbonisation across the whole region, extending from the Milford Haven through to Newport.

4.34 More immediately, businesses consulted as part of this study recognised both a ‘local’ market area focused around Swansea Bay and important links to the wider region. Several described working with a ‘South Wales and West of England’ customer base, with good east-west rail and road connections facilitating supply chain and employment links eastwards towards Cardiff. However, some also cited the importance of locally based supply chains and the value of a loyal, locally-based workforce.

4.35 Looking at business innovation facilities (beyond the research and development facilities offered by the universities and major employers), most provision is concentrated along the coastal corridor. Key recent investments include the Swansea Bay Technology Centre at Baglan (which itself offers expansion space to the existing Baglan Innovation Centre) and the new Kingsway digital innovation centre in central Swansea. Plans are also underway to develop the

'Matrix' innovation centre as part of the SA1 Innovation Waterfront Quarter in Swansea, led by UWTSO.

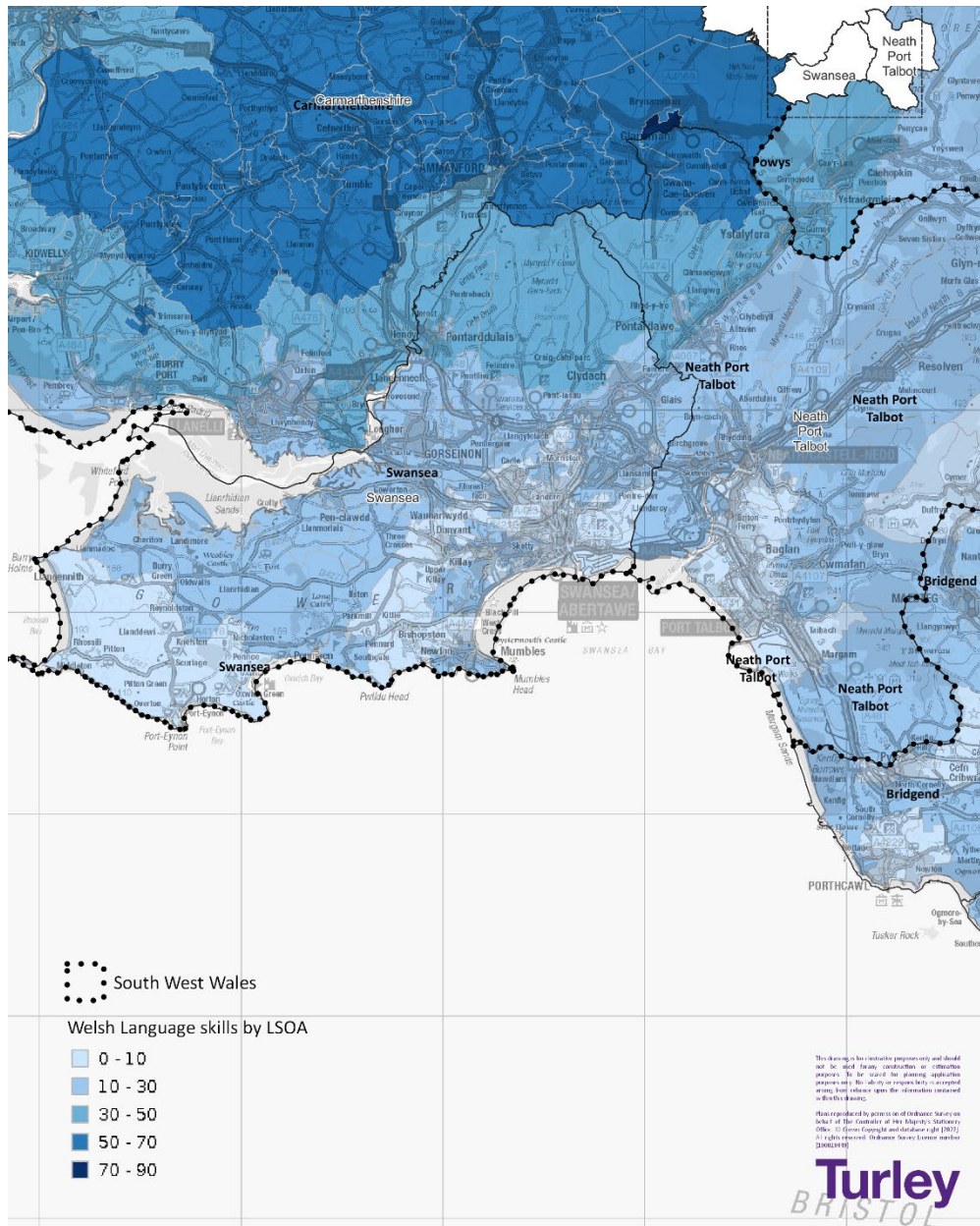
Cultural and leisure assets

- 4.36 The South West Wales Regional Economic Delivery Plan identified the potential for the region's growth as an "experience economy", taking advantage of its quality of life offer and its scope to develop its visitor economy and leisure offer. Within the context of the emerging NGA, Swansea offers a focal point for the regional leisure and cultural offer (with, for example, past investment in the Liberty Stadium and National Waterfront Museum; the recent completion of Swansea Arena within the city centre; and the planned heritage-oriented development of the Hafod Morfa copperworks site).
- 4.37 Within the rural parts of the area, visitor economy assets include the Gower AONB and a substantial 'outdoor leisure' offer. Recent and new developments to promote this include the new Wildfox resort being developed in the Afan Valley and investment in Waterfall Country. In addition, the area has an extensive industrial and pre-industrial heritage offer (e.g., Margam Castle and Neath Abbey in NPT, and Parc Howard in Llanelli).

Welsh language

- 4.38 Relevant to the scope and nature of development across the NGA is the need to safeguard and promote the use of the Welsh language. Within Future Wales the WG articulates a clear ambition 'for the Welsh language...to reach a million Welsh speakers, as well as increasing the percentage of people who speak Welsh daily by 10% by 2050', noting it identifies that there are over 562,000 speakers currently.
- 4.39 It presents a map drawing upon Census 2011 data to show comparative representation of Welsh speakers. An iteration of this map is shown below at Figure 4.7.

Figure 4.7: Number of people (aged three and over) able to speak Welsh, by settlement



Source: Future Wales, Census 2011

- 4.40 It is evident from this map that there are greater numbers of Welsh speakers into Carmarthenshire, when compared with the other parts of the study area. The mapping in Future Wales at a settlement level suggests that higher numbers of Welsh speakers are located in many of the settlements in Carmarthenshire, in closest proximity to Swansea. Other settlements with higher representations are also evident on the Gower and on the main arterial road north in NPT.
- 4.41 To a degree there is an underlying support for the growth of areas with strong representation and those where representation is lower if it will contribute to increased use of the Welsh language. In this context it is noted that within existing adopted Plans 'Welsh language sensitive areas' are defined in Swansea within the northern part of the county, and in NPT within the Amman, Upper Swansea and (part of) the Dulais Valleys and Pontardawe. Carmarthenshire's Deposit RLDP defines the entire county as 'linguistically sensitive', noting that even in the ward with the lowest proportion of Welsh speakers (Glanymor, in Llanelli), the percentage is still higher than the Welsh average.

Summary

- 4.42 This section has presented spatial analysis of the existing socio-economic profile of the area as well as the infrastructure which connects communities and areas of employment.
- 4.43 It is evident from this mapping that the larger settlements and employment locations along the coastal stretch clearly represent the most significant concentrations of both population and employment.
- 4.44 This coastal area is strongly connected by existing road and rail infrastructure and includes a concentration of associated social infrastructure services.
- 4.45 Less pronounced concentrations of population and jobs exist in the more peripheral smaller settlements in both NPT and Carmarthenshire. In part this reflects the more limited north / south transport infrastructure with road and rail connections stretching up the M4, A483 and A48 to Ammanford and Cross Hands and road connections (A465) up into the Valleys in NPT.
- 4.46 There are significant industrial linkages across the SBLNGA. These are principally located in the southern urban strip from Port Talbot to Llanelli and reflect both the 'legacy' of historic industrialisation, as well as current and practical links between businesses, their supply chains and the knowledge base.

5. Future growth opportunities

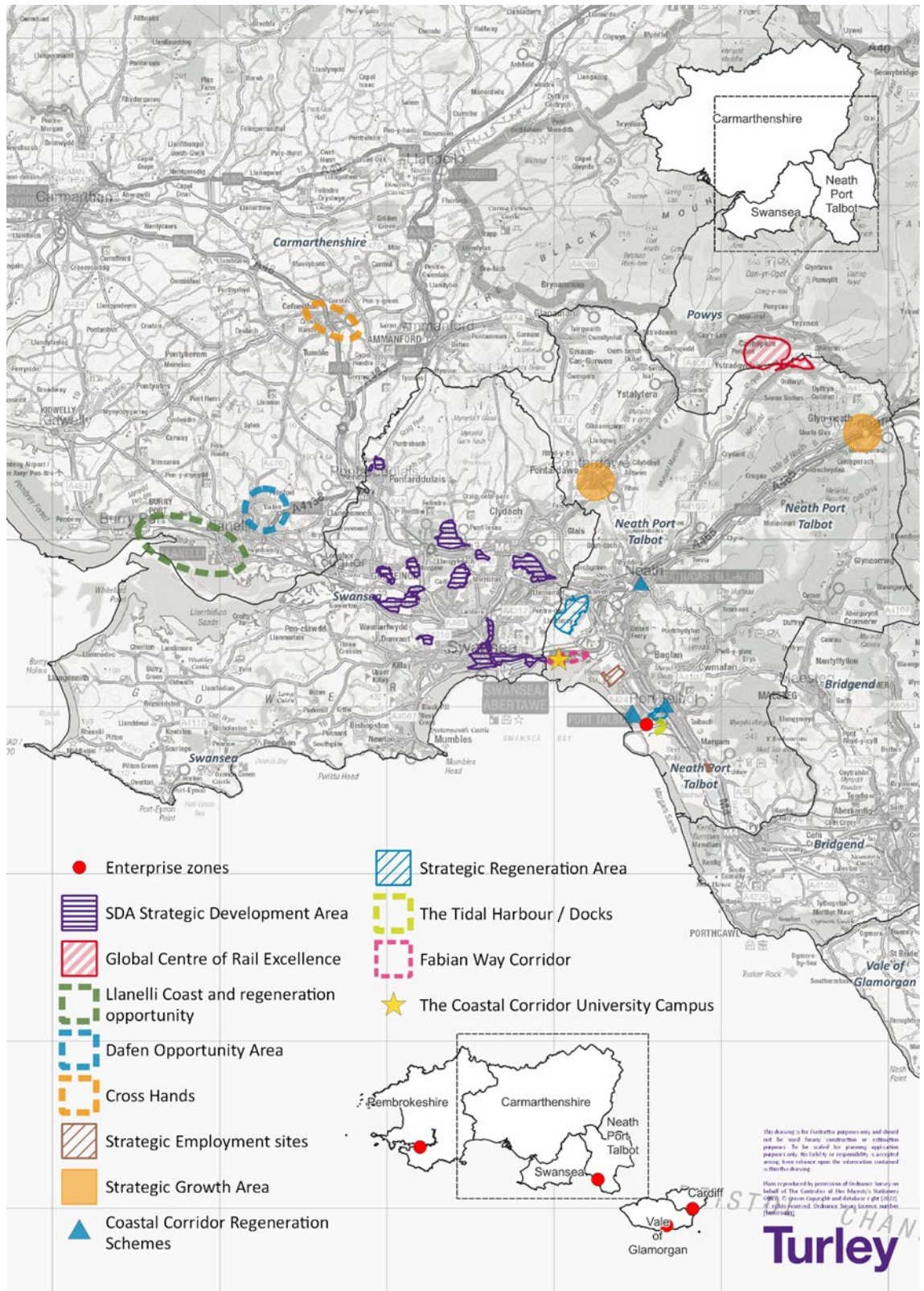
- 5.1 This section considers the second spatial justification strand acknowledged at the start of Section 4 considering how different parts of the study area demonstrate the ability to accommodate and absorb future national scale strategic economic and housing growth sustainably as well as investment in infrastructure.
- 5.2 This includes taking account of current proposals within existing and emerging LDP, published economic strategies and the separate identification of potentially transformational investments.
- 5.3 Alongside the identification of areas in which growth could be contained / facilitated the section also considers ongoing and future investment in the transport infrastructure across the area. Enhancements to this infrastructure will influence the demand for housing and employment space and will also have implications for the ability of households and workers to sustainably travel to access new opportunities.
- 5.4 The mapping of spatial opportunity areas using GIS is intended to help to build a greater understanding of the current and future growth opportunities in the region as a whole and ensure that any geographical refinement accurately reflects both existing concentrations and future growth potential ahead of further work being undertaken by the CJC to define the NGA as part of the preparation of the SDP, as explained in Section 3.

Planning for future growth – spatial areas of opportunity

- 5.5 Future Wales is explicit, as explained in Section 2, that the NGAs are to be the focus of strategic economic and housing growth and investment in infrastructure within their respective regions (South West Wales in the case of the SBLNGA) and that these areas are complemented by RGAS which will be a focus for managed growth and offer a variety of public and commercial services at a regional scale.
- 5.6 Each of the commissioning authorities have adopted LDPs and are at different stages of producing replacement Plans. These existing and emerging Plans include current identified areas of potential future growth, particularly with regards housing and employment land opportunities, which reflect the identified spatial strategy for the local authority.
- 5.7 This information has been used for the purpose of providing an indication of the key geographic areas of anticipated change and growth of scale. It is important to note that this is not intended to pre-empt the identification of plan-led spatial strategies for growth at a sub-regional or local level but to provide insight into the key areas in which nationally strategic growth could be expected which could have a bearing on the geographic extent of the NGA.

- 5.8 In identifying specific sites / opportunities for inclusion, a decision was made to not apply a threshold (i.e. number of homes / jobs) below which specific areas would be omitted. This recognises that the 'strategic' contribution of development / regeneration opportunities is more nuanced than a simple consideration of scale, as a development opportunity may for instance attract national interest or significance because of the type of intended occupier rather than the number of jobs it will create. This recognises the justification in Future Wales, which as noted in Section 2, confirms that NGAs will also be the focus of advanced manufacturing, digital and transport infrastructure.
- 5.9 Figure 5.1 therefore layers on the available information provided by each of the authorities considered to be of strategic scale or significance.

Figure 5.1: Identified potential areas of significant future growth – housing and employment



5.10 The key identified areas of potential growth for each authority are considered in turn.

Swansea

5.11 The Swansea LDP was adopted in 2019 and provides the most up to date development framework for growth within the County. The key growth areas within Swansea are primarily those located within allocated SDAs. In addition, the LDP 'safeguards' land adjoining Morriston Hospital (Policy SI 4) for the expansion of the hospital to deliver a facility of regional significance. The SDAs are identified in the Plan as 'sustainable new neighbourhoods...within, or close to the existing urban area' [Reference: Swansea Local Development Plan 2010 – 2025, paragraph 1.3.23]. In total 12 SDA locations are identified. Residential led SDA have been assessed as accommodating a minimum of 400 homes and are anticipated to cumulatively deliver almost 5,300 homes. The mixed-use SDAs are anticipated to deliver a further circa 4,400 homes. In total the Plan confirms that the SDAs are intended to contribute around 70% of all allocations for residential development in the plan period. The SDAs and their intended development uses are identified as being:

- South of Glanffrwd Road, Pontarddulais – residential led for circa 720 homes
- North of Garden Village – residential led for circa 750 homes
- South of A4240, Penllergaer – residential led for circa 850 homes
- West of Llangyfelach Road, Penderry – residential led for circa 1,950 homes
- North of Clasemont Road, Morriston – residential led for circa 600 homes
- Cefn Coed Hospital – surplus lands for residential led development for 427 homes
- Northwest of M4 J46, Llangyfelach – mixed-use accommodating circa 800 homes and 14ha strategic business park
- North of Waunarlwydd extending north to Fforestfach – mixed-use development accommodating circa 1,319 homes and regional employment site
- The Fabian Way Corridor – a key employment location, benefitting from the proximity to the Swansea University Bay Campus and University of Wales Trinity St David Innovation Quarter and Swansea Port with capacity for circa 525 homes and 12 ha of potential employment uses
- Swansea Vale – development strategy to bring forward remaining land with capacity for circa 450 homes and 4ha of employment uses

- Swansea Central Area – this includes the City Waterfront area and is subject to a number of significant development projects at prominent city centre locations, which collectively aim to deliver new residential uses (up to 900 homes) alongside office space and commercial development that aims to generate significant employment opportunities. A number of schemes are being brought forward by the Council with a development partner ‘Urban Splash’.
- The Tawe Riverside Corridor and Hafod Morfa Copperworks– a riverside strategic site of significant heritage importance that aims to provide a mix of uses, including housing (up to 370 homes), alongside significant new leisure and commercial development, including the ‘skyline’ proposals for a regional scale adrenaline leisure attraction

Neath Port Talbot

5.12 NPT Council is currently in the process of developing a RLDP and therefore again the key growth areas within the adopted version of the Plan (January 2016) have been included alongside other identified areas of future strategic opportunity. The LDP has identified the following as being strategic in nature and therefore of significance in defining the NGA:

- Strategic Regeneration Areas at Coed Darcy (Neath) and Harbourside (Port Talbot), which are both under construction. Coed Darcy is anticipated to have the capacity to deliver c.4,000 new homes and 41,200 sqm of B1 Business space. Harbourside is anticipated to delivery c.385 new homes and 7 ha of employment land and 3.37 ha of A1 Bulky Comparison Goods uses.
- Strategic Employment sites at Baglan Bay and Junction 38 (M4) Margam. The Plan notes that ‘These sites are located in the coastal corridor which is the area of highest market demand with easy access to the strategic road and freight networks.’ [Reference: Ibid, paragraph 5.2.2] The site at Baglan Bay is made up of some 75ha of land, albeit only 15 ha is allocated for conventional employment in the plan period. The site is intended to provide a range of types and sizes of employment units, including scope for manufacturing industries and is intended to meet a regional need in this regard. WG are in the process of purchasing the Baglan Bay site with the intention to actively promote it is an important employment location and accelerate its delivery.
- Strategic Growth Areas – two such areas are identified in the Valleys, Pontardawe and the Upper Neath Valley. The LDP defines the former noting: ‘Pontardawe is the largest settlement in the Valleys Strategic Area and has the facilities and amenities to support significant additional growth over the Plan period. This growth in the Pontardawe area will help to support and enhance the town of Pontardawe, its retail and cultural amenities and will support and encourage economic development across

the Swansea and Amman Valleys. [Reference: Neath Port Talbot County Borough Council Local Development Plan (2011-2026) Adopted January 2016, paragraph 4.0.33] In total the Plan identifies the capacity to deliver circa 660 houses and 0.2 ha of employment land. The Upper Neath Valley SGA has identified capacity for circa 264 homes and 1.2 ha of employment land.

- The Coastal Corridor University Campus which recognises the allocation of land on Fabian Way for the development of the Swansea University Science and Innovation Bay Campus, which because of its recent completion has doubled the size of the University as well as the recognition of potential further subsequent expansion capacity. It is noted within the LDP that 'The development is seen as significant in terms of attaining the aspirations and key principles for socio-economic growth in the region as set out within the Wales Spatial Plan, acting as a major contributor to the knowledge economy in providing an innovation campus where higher education and research and development can be fully integrated.' [Reference: Neath Port Talbot County Borough Council Local Development Plan (2011-2026) Adopted January 2016, paragraph 4.0.28]
- Coastal Corridor Regeneration Schemes aimed at enhancing and supporting growth and development of the coastal corridor – three mixed use regeneration schemes are identified all of which are at different stages of development at the time of writing and include; Neath Town Centre, Glanafan Comprehensive School and Afan Lido schemes.
- The Tidal harbour / Docks which provide a strategic access point for both general cargo and deep water facilities for bulk cargo. The LDP safeguards these freight facilities under Policy TR 4, stating that: 'These will be safeguarded in recognition of the important role they have in supporting the local economy and allowing goods to be transported by means other than road, reducing congestion and emissions.' [Reference: Ibid, paragraph 5.4.31]
- The Port Talbot Waterfront Enterprise Zone (EZ). The latest published Strategic Plan for the EZ confirms that it has successfully accommodated a wide diversity of sectors – including Advanced Materials and Manufacturing, Energy and Environment and Construction [Reference: Port Talbot Waterfront Enterprise Zone Strategic Plan 2018 – 2021 (February 2019)].
- 19 designated employment areas, including Tata Steelworks and Margam (EC2/11). The steelworks at Port Talbot currently employs in the region of 4,000 workers.
- It is also recognised that there are further brownfield development opportunities within the three main town centres of Neath, Port Talbot and Pontardawe, which can accommodate modest scale development.

Carmarthenshire

- 5.13 The Council as part of this project and in the context of the development of its Deposit RLDP identified 3 opportunity areas, which take into account existing allocations within the adopted Plan.
- 5.14 Whilst this approach differs from that described above for NPT and Swansea this recognises the more advanced progress of the RLDP.
- 5.15 Each of the areas are, however, located within areas identified as Growth Areas in the adopted LDP and the Deposit RLDP. The 3 areas described below are shown on Figure 5.1 therefore as broad geographies, not in a form which is directly reflected in emerging or adopted planning policy but to capture the areas where most regeneration opportunities and growth are focused. The first two areas, the Llanelli Coast and regeneration opportunity area and the Dafen opportunity area fall within the Llanelli Growth Area identified in the adopted LDP. This is identified as having residential allocations to accommodate 3,927 homes. This capacity is reduced in the deposit LDP to approximately 1,700 homes albeit noting that this is subject to review:
- The Llanelli Coast and regeneration opportunity area which is viewed as stretching along the coastal area skirting the south of the main urban area and along to Burry Port. This area includes opportunities for significant regeneration opportunities including joint venture arrangements with the WG and potential to capitalise on the emerging Pentre Awel life sciences Development at the heart of this area.'
 - Dafen opportunity area: The opportunity area also offers the opportunity for significant employment uses with the Deposit RLDP identifying 14.93 ha of employment land within the opportunity area, a figure which is lower than the allocation in the adopted LDP which identifies 22.80ha of land for B1, B2 and B8 uses. The Council that this land could potentially accommodate around 3,700 employees if developed solely for offices uses or around 890 jobs for only industrial uses (production/ warehousing), albeit noting that where a mix is more likely the job potential is likely to be within this range.
 - Cross Hands: In the adopted LDP the capacity of the wider growth area (including Ammanford) is identified as being 2,552 homes albeit again this is reduced in the Deposit RLDP to 1,080 homes, albeit again this is subject to review. The opportunity area also offers the opportunity for the provision of new employment uses with the Deposit RLDP identifying 21.92 ha of employment land within the opportunity area, broadly the same as the allocation in the adopted LDP which identifies 21.12ha of land for B1, B2 and B8 uses. As above the Council has estimated the potential for job generation based on four distinct areas. Within the Cross Hands East (8.7ha) area it is estimated that between 2,425 (offices) or 579 jobs (industrial workers) could be accommodated. It is perceived that the

balance is likely to be more oriented towards office-based employment. On the Business Park (4.73ha) it is estimated that between 2,956 (office) or 706 jobs (industrial) would be created with interest currently more oriented towards B2/B8 uses. Meadows Road (1.09 ha) identified as having the potential for between 600 (office) or 164 jobs (industrial) and finally Cross Hands West Food Park (7.31 ha) the Council identifies based on recent interest in the expansion of existing uses the potential for just over 1,000 jobs to be generated in production / warehousing units.

Other potentially transformational economic investments

- 5.16 In addition to the key development opportunities cited above, there are several other potentially transformational investments of regional or national significance, described in the following paragraphs.

The Global Centre of Rail Excellence

- 5.17 The planned development of a Global Centre of Rail Excellence (GCRE), located on lands within NPT and Powys County Council administrative areas at and surrounding the Nant Helen Open Cast Coal Site and Onllwyn Distribution Centre, is a project of potentially UK significance with Central Government investment identified.
- 5.18 Planning permission was granted for two test tracks of loop configuration together with operations and control offices, including staff accommodation, and research and development, education and training facilities. The site is connected via road and an existing rail connection linking to the Neath and Brecon branch line, albeit it does not provide passenger service connections currently. The GCRE is proposed to provide a UK-based modern and comprehensive rail testing facility, noting that such a facility doesn't currently exist with facilities having to be accessed in Europe and the USA, and to act as a catalyst for the creation of a rail technology hub in Wales, providing an open market platform for leading research and development activity to improve the UK's competitive strengths as a world leader in achieving carbon neutrality.
- 5.19 It has a stated objective to develop education and training opportunities in partnership with universities, including those in the Coastal Area and the University of Birmingham. The assessment of socio-economic impacts to the planning application identified the potential to create between 53 (phase 1) and 163 (phase 3) net direct jobs during construction and the creation of between 141 (Phase 1) and 298 (phase 3) jobs during operation. It identifies that many of these operational jobs will be high skilled.
- 5.20 NPT Council has identified that potential additional lands in proximity to the existing GCRE site have been identified through the Call for Candidate Sites exercise for its RLDP, offering the opportunity for additional complementary development.

Pentre Awel

- 5.21 Pentre Awel is a £200 million life science and wellbeing village currently being developed across 83 acres at Delta Lakes on the southern side of Llanelli. It is a key project within the Swansea Bay City Deal, and involves the delivery of a clinical delivery and research centre to enable Hywel Dda University Health Board to expand its research and medical engineering provision by focusing on community level clinical trials; an education and training centre to support access to health and social care careers; new leisure facilities; social and affordable housing (including an assisted living village); up to 10,000 sq m business expansion space; open market housing and a hotel. The full business case for the project anticipates the creation of over 1,000 jobs, with the first phase (the leisure centre, education and training centre and clinical delivery and research facility) planned for completion in 2024.
- 5.22 Pentre Awel is anticipated to have a positive economic outcome on a relatively deprived part of Llanelli. It also aligns closely with opportunities and assets elsewhere in the SBLNGA: Swansea University and UWTSD are leading partners, and the focus on health and wellbeing is consistent with the emerging life science strengths described earlier (e.g., linked with the Institute of Life Sciences at Swansea) and the collaboration between the Swansea Bay and Hywel Dda University Health Boards (serving NPT and Swansea, and Carmarthenshire respectively).

Blue Eden

- 5.23 Originally developed from the proposals for a Swansea Bay Tidal Lagoon, the Blue Eden project envisages a privately-financed scheme involving the construction of a 9.5 km tidal lagoon south of the Prince of Wales Dock in Swansea. This would be the UK's first tidal lagoon, with capacity to generate 320 MW of renewable energy. The project envisages development over twelve years. This involves proposals for a circa 5,500 sqm (60,000 sq ft) 'giga factory' producing advanced batteries for the renewable energy sector; a floating solar array; data centre and residential development. The proposition is that the lagoon will generate cheap and plentiful renewable energy, taking advantage of Swansea Bay's natural assets and powering relatively energy-intensive industrial uses.

Wildfox Resorts

- 5.24 Planning permission was granted in 2022 for the Wildfox Resorts Afan Valley development in NPT. The Council considers this to be a potentially transformational new leisure development. The development is cited as being a £250m investment, which will deliver 570 holiday lodges, a 50-bed hotel and 15-bed apartment-hotel as well as an indoor water park and canyoning facility. It is anticipated that the development will, beyond the creation of construction employment opportunities, boost tourism within the area all year around mitigating against current issues of seasonal employment. The scale of the opportunity and its unique offer is anticipated to draw tourists from across the UK thereby raising the profile of the area nationally.

The Fabian Way / Jersey Marine area

- 5.25 The Fabian Way / Jersey Marine area is considered to represent an important opportunity area. In addition to the Corridor area identified in the Swansea LDP it is anticipated that it will accommodate future employment and housing development within NPT recognising the opportunity to build on the growth area identified in Swansea and its location between the University Campus, M4 and the Docks. NPT Council have identified that lands along the corridor have been promoted as part of a recent Call for Candidate Sites exercise as part of its RLDP.

Future Ports

- 5.26 Alongside the Blue Eden proposal, ABP owns around 56 hectares of development land around Port Talbot docks and Margam, including Port Talbot's deepwater port, which currently principally serves Tata Steel. In 2021, ABP published its Future Ports Vision, which sets out an ambition to develop the Port at Port Talbot to support "low carbon, port-centric manufacturing facilities", and the development of the renewable energy industry [Reference: ABP (2021), Future Ports: Port Talbot (<https://www.abports.co.uk/media/ad4px2sn/abp-future-ports-port-talbot-online-final.pdf>)]. The Future Ports Vision describes a transformational refocusing on low carbon growth opportunities, geared around four 'missions':

- Energy generation, including floating offshore wind (FLOW), with the potential for the development of manufacturing capacity; and onshore wind and solar power generation. Development of FLOW technology is currently at a relatively early stage, and ABP acknowledges strong competition from elsewhere, although access to deep water, brownfield development land and proximity to steel production and aggregates are seen as important assets. Early economic analysis carried out for ABP anticipates between 570 and 1,000 jobs (gross) in NPT, in operations and maintenance, manufacturing and the supply chain, although these should be seen as preliminary estimates at this stage [Reference: MetroDynamics for ABP (2022), Outline Economic Impact Assessment of the Floating Offshore Wind (FLOW) at Port Talbot and Swansea. This also estimates 420-820 gross jobs at Swansea.].
- Decarbonising manufacturing, including opportunities for carbon capture, use and storage and facilities for the import of hydrogen, potentially making Port Talbot an attractive location for energy-intensive industries in, for example, cement, chemicals, glass and ceramics.
- Logistics, through the more effective use of Port Talbot's rail connections with the deepwater Port
- The development of a manufacturing and research and development cluster, building on NPT's existing manufacturing capabilities. Interest has been expressed in larger scale manufacturing facilities linked with

proximity to energy production (potentially supporting some 1,300 jobs at Baglan, Harbourside and the Port) [Reference: SQW for University of South Wales (2022), Strategic Hydrogen Site Development in Neath Port Talbot: Analysis of potential economic impacts].

- 5.27 The ambitions for the Port could have very significant implications for economic growth. They are also of wider regional and national significance, linked with the SWIC programme cited above. Of current relevance, the UK and WG jointly launched a bidding process in September 2022 for sites to come forward for designation as ‘Freeports’, to benefit from a series of customs and tax incentives (and potentially other measures) to support investment [Reference: <https://www.gov.uk/government/publications/freeport-programme-in-wales-bidding-prospectus/freeport-programme-in-wales-bidding-prospectus>]. A proposal for Freeport designation is currently being jointly developed by ABP at Port Talbot and Milford Haven Port Authority, linked with the ports’ renewable energy and decarbonisation potential and (at Port Talbot) significant site availability).

Transport infrastructure investment

- 5.28 Alongside the designations of potential housing and employment growth identified in the preceding section and within the context of the acknowledged importance of sustainable transport and accessibility in national policy the potential enhancement or delivery of new transport infrastructure is an important further consideration as to where growth can be expected to be accommodated.
- 5.29 The significance of national connectivity is set out in Policy 11 of Future Wales, which includes encouragement for longer-distance trips to be made by public transport and supporting the delivery of investments in associated networks. Importantly the policy expects planning authorities to ‘maximise the opportunities that arise from them’ [Reference: Future Wales, page 83]. Policy 12 sets out a similar focus on the importance of improving regional connectivity. This includes to support sustainable growth and regeneration in Urban areas prioritising the improvement and integration of active travel and public transport. The policy expects that planning authorities “must plan the growth and regeneration of the National and Regional Growth Areas to maximise opportunities arising from the investment in public transport, including identifying opportunities for higher density, mixed use and car free development around metro stations”.

Key existing transport schemes

- 5.30 Engagement was held with transport officer leads within each of the authorities to identify specific transport investments. It was noted through this engagement that timescales were uncertain with regards the next iteration of the Regional Transport Plan, with the current version now comparatively dated. Similarly, at the time of writing the outcome of the WG Roads Review was

awaited. In considering the future nature of investment in transport infrastructure reference was made to the clear steer provided by the Wales Transport Strategy with it suggesting notably limited investment in new road-based schemes, with the emphasis very much on sustainable travel options and active travel.

- 5.31 This is reflected in the identified key transport infrastructure schemes identified by officers, including current schemes supported by the Local Transport Fund / Active Travel Fund and potential bids, to which this research should take consideration. These are listed below for each authority.

Swansea – infrastructure schemes

- Public Transport Hubs (Morrison and Mumbles Bus Interchange – improvements to the existing interchange facilities, maximising the opportunities for travel and improving comfort, safety and the ability to use waiting time productively
- Bus Corridor Infrastructure Assessment and Improvement Package (Mumbles to Ystradgynlais) - £230k of improvements for full implementation in 2022 / 23
- Pontarddulais Interchange – identification of preferred site in 2022/23 to provide enhanced accessibility, interchange and improved customer experience across Pontarddulais and its surrounding area
- Gowerton Interchange – provision of a dedicated mobility hub
- Landore Park and Ride – Identification of a preferred Park and Ride site as a key interchange targeting vehicles exiting the M4 from J45 (Ynysforfan) and provide opportunities for integration with local bus services. Future phases will consider a bus corridor through Swansea Enterprise Park
- The Swansea Northern Strategic Route including the Pontarddulais Link which will create a 2.4km traffic free shared use path between Grovesend and Pontarddulais and through to Coed Bach Park. It will also include a further 2.8km off-road path between Penllergaer and Gorseinon, with a connection to the recently constructed off-road link from Gorseinon to Gowerton Railway Station which will enable multi-modal journeys. The scheme will also include the Pontarddulais Public Transport Link
- Swansea City Centre Links including a 2.8km off-road shared path connecting the A48 shared-use path to Cadle and the surrounding Fforestfach retail Centre, as well as the Parc Penllergaer residential estate
- Swansea Valley Links including the Morrison South Link off-road path and the Ynysallan Road shared use route for pedestrians and cyclists

- West Swansea Links – provision of a 2.4km shared-use route over Clyne Common connecting the residential area of Bishopston
- Fabian Way Innovation Corridor – potential scheme to be supported through a Levelling Up Fund bid to which the outcome is awaited. This involves a series of active travel routes and a new Park and Ride connection to the Metro / LRT.

Neath Port Talbot – infrastructure schemes

- Integrated Transport Hub at Neath railway station – Proposal to create a transport interchange linking different modes of travel recognising the existing railway station is remote from the town’s bus station
- Cymmer Carriage Way Improvement – Proposal to improve Cymmer viaduct, which provides the only suitable access to the communities of Abercregan and Glyncorrwg for heavy vehicles, buses and emergency vehicles. Improvements will therefore be important in maintaining connectivity to neighbouring communities
- Newbridge Active Travel Link and Dock Access – Proposal to refurbish existing bridge to reopen it to pedestrians and cyclists alongside the provision of a shared pedestrian and cycle track (375m) along Newbridge Road and the upgrading of Riverside Road (516m) to adoptable standards to connect to the existing travel network.
- Port Talbot Bus Station – Proposal to regenerate the existing bus station to provide a more welcoming area while allowing space for buses, Taxis and active travel.

Carmarthenshire – infrastructure schemes

- Tywi Valley Path (£18m scheme) providing a 20km shared path linking Carmarthen to Llandeilo. Funding secured via Levelling Up Fund (LUF)
- Upgrade of Carmarthen Bus Station – Phase 1 works currently underway on existing footprint improving waiting facilities and pedestrian environment
- Llanelli A484 and Black Bridges – Active Travel bridges spanning major road and rail routes providing crucial links within the wider Llanelli Active Travel Masterplan
- Electric Bus Depot – In partnership with TfW and WG to serve the Traws T1 route. Electric Bus depot and associated facilities being constructed at Nant Y Ci Carmarthen. 6 No. E-Buses in process of being procured
- St Clears Railways Station and associated facilities/interchange – Re-opening of St clears railway station. Funding awarded being delivered by TfW in conjunction with Network Rail, and Welsh Government. CCC on

project team and subject to funding / deliverability currently progressing the interchange facilities and active travel linkages

- Major interchange development at Llanelli Railway Station – Work to the south of the existing station to provide bus rail interchange, active travel electric charging and parking facilities LUF bid submitted awaiting outcome
- Sandy Road and wider Llanelli junction improvements – Major investment to improve highway conditions on Sandy Rd a significant congestion point on the x11 bus route from Carmarthen to Swansea via Llanelli. Scheme currently in the Roads Review

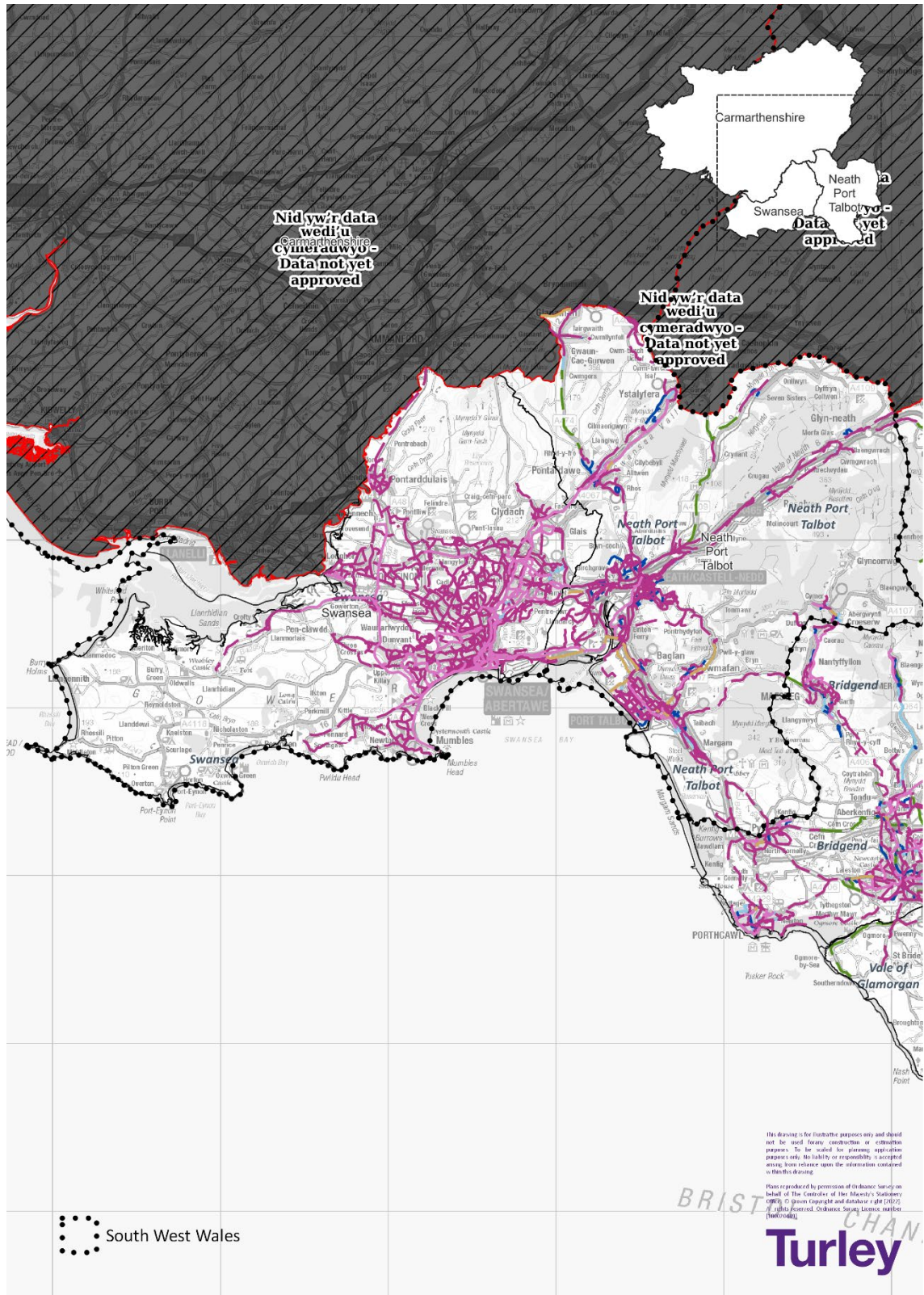
Pembrokeshire – infrastructure schemes

- Haverfordwest Transport Interchange Project (£15m scheme, new bus station, multi-storey car park, active travel facilities, electric vehicle infrastructure, taxi facilities). Funding secured in 2022-23 for demolition of existing facility and phase 1 construction
- Milford Haven Interchange Project (£6m scheme, new rail station, new bus focal point, active travel facilities, electric vehicle infrastructure, taxi facilities). Currently at preliminary design stage. Awaiting Levelling Up Fund bid outcome
- Newgale Coastal Adaptation & A487 Diversion Scheme (£20m scheme, a new 2.5km road alignment of the A487 at Newgale, located between Haverfordwest and St David's. Scheme on hold awaiting the outcome of the Welsh Government Roads Review

Active Travel investment

5.32 Many of the identified schemes above will improve active travel routes. The Welsh Government has previously prepared Active Travel network maps across the study area. These have recently been updated and made available on Datamap Wales. The identified routes / investments are identified on the maps below, noting at the time of writing only the maps for NPT and Swansea were approved and therefore able to be presented.

Figure 5.2: Active Travel Network Maps



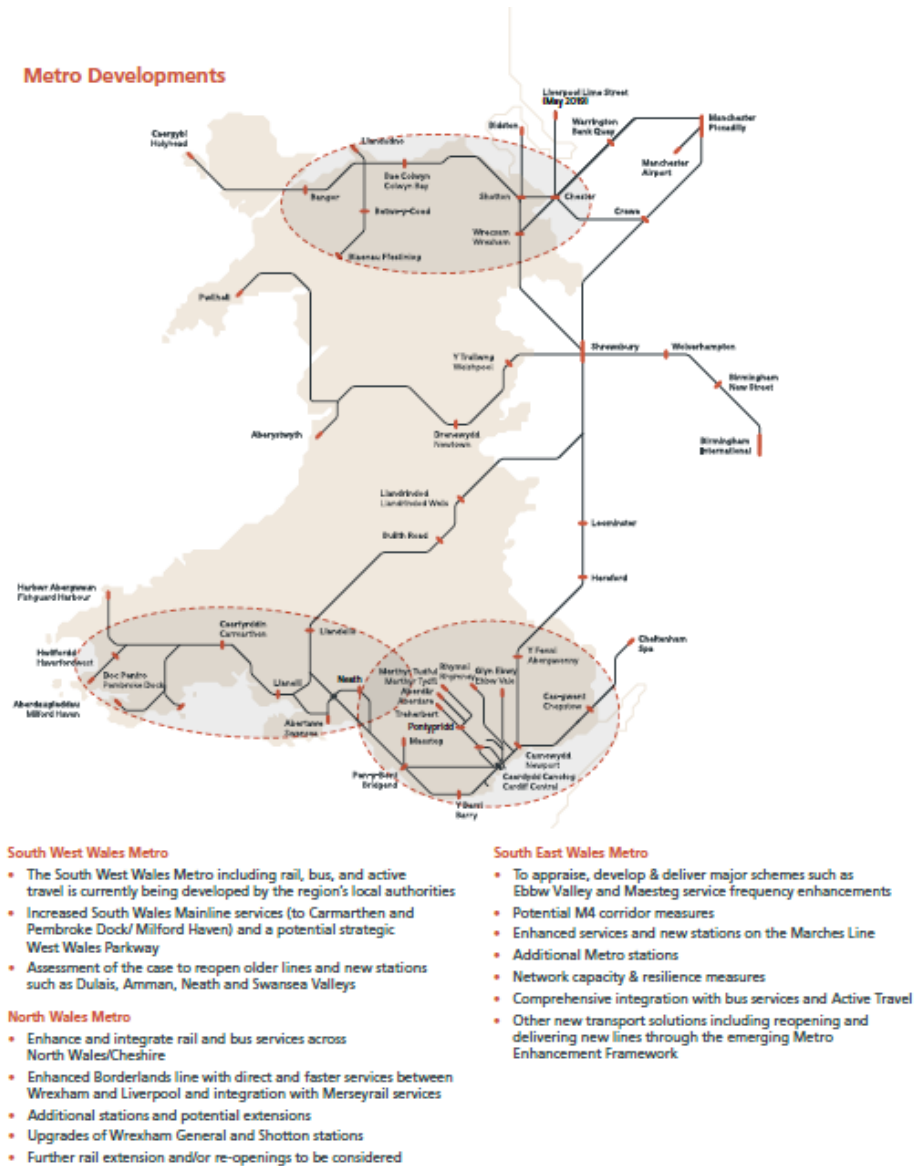
Source: Datamap Wales

- 5.33 The plan shows an extensive concentration of active travel routes within the larger settlements and indeed connecting them. This reflects investment to date and the existing networks.

The Swansea Bay and West Wales Metro

- 5.34 Further to the above local infrastructure schemes the investment planned through the Swansea Bay and West Wales Metro also offers the opportunity to influence and affect the spatial scope and location of growth.
- 5.35 Future Wales Policy 31 confirms the support of the WG to the development of the Metro requiring: 'Planning authorities should plan growth and regeneration to maximise the potential opportunities arising from better regional connectivity, identifying opportunities for higher density, mixed-use and car-free development around new and improved metro stations.' (Future Wales, page 157)
- 5.36 The map on page 88 of Future Wales is replicated below, noting the significance of the South West Metro at a national scale.

Figure 5.3: Future Wales Metro Developments



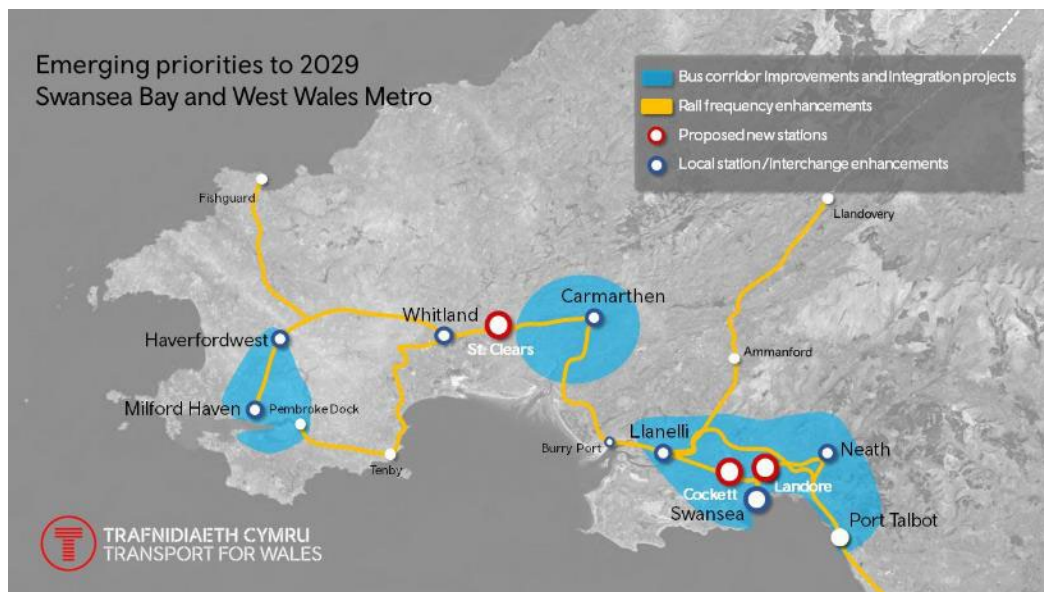
Source: Future Wales, page 88

5.37 Whilst progress has been affected by the pandemic Transport for Wales continues to prioritise the ambitious plans it has for improvements, which will include:

- Bus corridor improvements and integration projects
- Rail frequency enhancements
- New stations
- Local station / interchange enhancements.

5.38 Figure 5.3 shows the identified priorities to 2029 for the Swansea Bay and West Wales Metro. This shows the concentration of enhancements within the key coastal area connecting Llanelli, Swansea, Neath and Port Talbot. It also shows enhancements stretching to Burry Port and through to Carmarthen and beyond into Pembrokeshire and also up to Ammanford on the way to Llandoverly, with this reinforcing the importance of this existing transport corridor north and the connection to the main urban area. It is noted that the investment in the line through Ammanford has already resulted in an additional service at the beginning and end of the day thereby improving comparative connectivity.

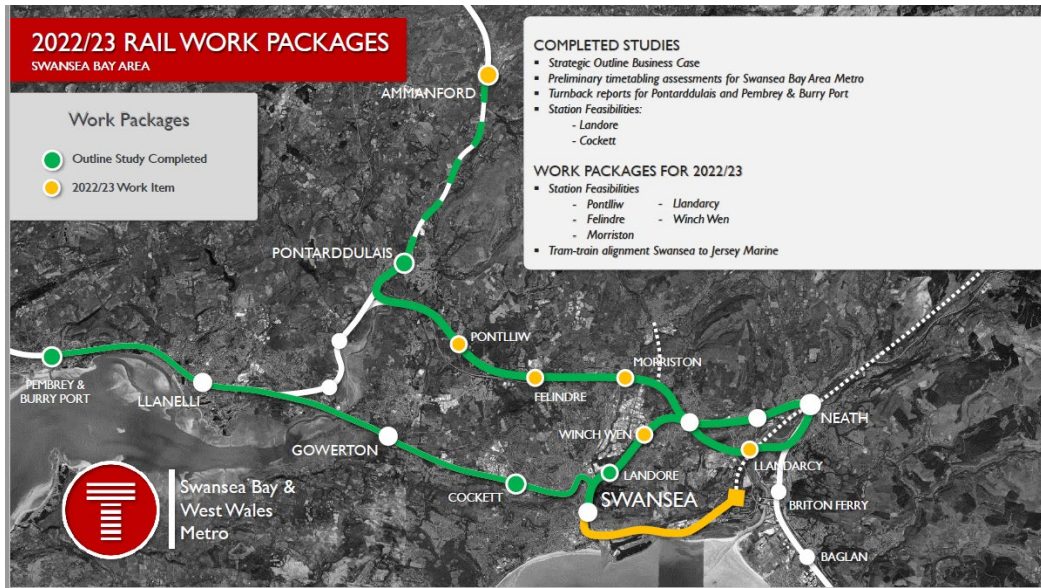
Figure 5.4: Transport for Wales priorities to 2029 for the Swansea Bay and West Wales Metro



Source: Transport for Wales

5.39 As shown in Figure 5.4 station feasibility studies have also been completed for the potential creation of new stations at Landore and Cockett, with feasibility studies programmed in 2022/23 for stations at: Pontlliw, Morryston, Felindre, Llandarcy and Winch Wen. Further studies have been completed for Pontarddulais and Pembrey and Burry Port.

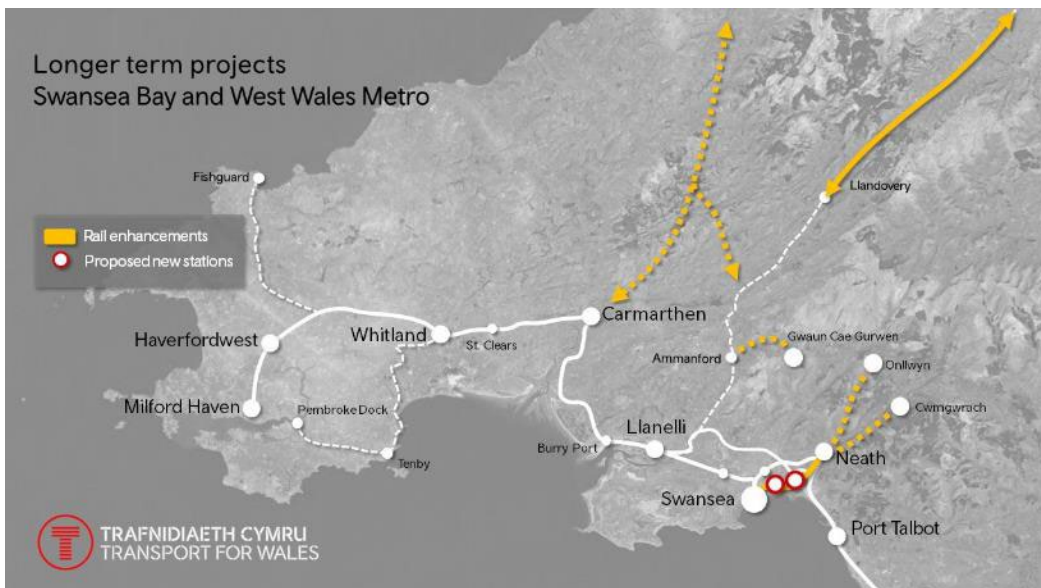
Figure 5.5: 2022/23 Rail Work Packages



Source: Transport for Wales

5.40 Further long-term investment plans and improvements are also identified, as shown in Figure 5.5. This shows enhanced connections out from Swansea, through Neath and up into the Valleys in NPT. This offers the potential to further extend growth north along this further transport corridor in the longer-term.

Figure 5.6: Transport for Wales Longer term projects for the Swansea Bay and West Wales Metro



Source: Transport for Wales

5.41 It is of note that the mainline programme also proposes enhancements along the coastal rail improving connections between Milford Haven through to

Bristol, with a concentration of improvements along the rail connections between Swansea and Cardiff. Whilst these represent strengthened longer-distance connections as reflected on in Section 5 of this report these reinforce the importance of complementarity between NGAs and RGA along this corridor.

Grand Union Trains

- 5.42** Finally, it is understood that Grand Union Trains have investment plans to launch a new service between Carmarthen and London. This service is intended to start with a full service between Carmarthen and London in 2025 during the timetable that begins in December 2024. A new parkway station is proposed to be built at Parc Felindre close to Junction 46 of the M4 motorway. Services will call here and bypass Swansea thereby reducing journey times from further west to Cardiff and London by around 20 minutes. It is reported by Grand Union Trains that this new service will bring more journey opportunities, wider economic benefits and significant employment to the people of South Wales. Evidently this could represent a significant infrastructure investment influencing the connection of people within the potential NGA area to other economic hubs, albeit at the current point in time there is no certainty regards its delivery with the formal application to the Office of Rail and Road submitted on 21 June 2022 following a period of industry consultation.

Summary

- 5.43** The mapping of the key identified potential areas of significant future growth of both housing and employment uses suggests that the socio-economic spatial pattern described in the previous section is anticipated to continue to be built upon, through the extensions of existing settlements, in particular around Swansea but also along the coastal corridor in NPT and Carmarthenshire. This includes existing large opportunity sites within Neath, Port Talbot and Llanelli. Within this geography there are also several 'transformational' economic projects in the pipeline. These are of strategic significance (and are of UK significance in the case of Blue Eden or the development of the Port of Port Talbot) and will impact across the SBLNGA as a whole.
- 5.44** Spatial exceptions potentially include areas of anticipated growth, of both housing and employment in Carmarthenshire around Ammanford, Cross Hands and Burry Port, reflecting the opportunities presented by the existing transport network.
- 5.45** The review of significant investments / projects also identified the GCRE development project, which whilst in a comparatively isolated position is understood to be reasonably represented as a project of UK economic significance.
- 5.46** Planned and ongoing investment in the identified transport infrastructure will have an impact on the capacity of areas benefitting from improved accessibility / quality of service to sustainably accommodate growth. Many of these schemes are linking key settlements/ areas of the urban area. Importantly

where many of the schemes involve improved active travel investment this should encourage a more sustainable and closer relationship between jobs and homes within the core urban areas of the geography. Other investment will assist in connecting more peripheral parts of the urban area and proximate settlements. This investment will be expected to further drive the identification of sustainable development opportunities, not only immediately around the identified investment within a reasonable travel distance and at key nodal points.

- 5.47 At a more strategic scale investment in the Swansea Bay and West Wales Metro will further serve to improve the connections along the coastal area, but also importantly in the northerly routes out of this area first up through Ammanford and Cross Hands in Carmarthenshire and then in the longer-term up beyond Neath into the Valleys in NPT.

6. Potential constraints

6.1 Future Wales acknowledges the spatial juxtaposition, and indeed overlapping nature, of growth areas and potential constraints. In particular, the South West Wales Regional Diagram (Figure 1.1 of this report) shows the Swansea and Llanelli NGA abutting a National Park and an AONB as well as two of the WG's Pre-assessed areas for wind energy.

6.2 Under Policy 30 the importance of managing the environmental assets of the South West area is identified as a priority for the region, in the context of potential support for the identification of a Green Belt to manage urban form and growth in the South West. Specifically, in terms of the types of areas to be considered it identifies the following as outstanding natural resources:

'the coast, Pembrokeshire Coast National Park, the Gower Area of Outstanding Natural Beauty, minerals, agricultural land, water and a high quality landscape.'
[Reference: Future Wales, page 155]

6.3 This section uses GIS to present a finer grain analysis of the geographic extent of areas which can be impacted by constraints, with an emphasis on more fundamental or significant constraints, and their relationship with the larger urban areas, transport network and identified economic investment areas considered in the previous section. In the context of growth these constraints include, for example, environmental protections as well as specific policy protections.

Identifying relevant constraints

6.4 Working with the authorities a range of relevant constraint layers have been identified. In order to allow for visual interpretation of these layers, recognising in many cases they overlap, they are presented and considered in a series of groupings.

Statutory environmental protection designations

6.5 The following layers have been mapped which represent important environmental designations impacting on the potential to deliver development across the study area:

- National Parks: Parts of Carmarthenshire are covered by the Brecon Beacons National Park, with the boundary of the national park abutting NPT. To the east the Pembrokeshire Coast National Park covers large parts of Pembrokeshire.
- Areas of outstanding natural beauty (AONB): In the study area this is limited to the AONB designation on parts of the Gower Peninsula in Swansea.

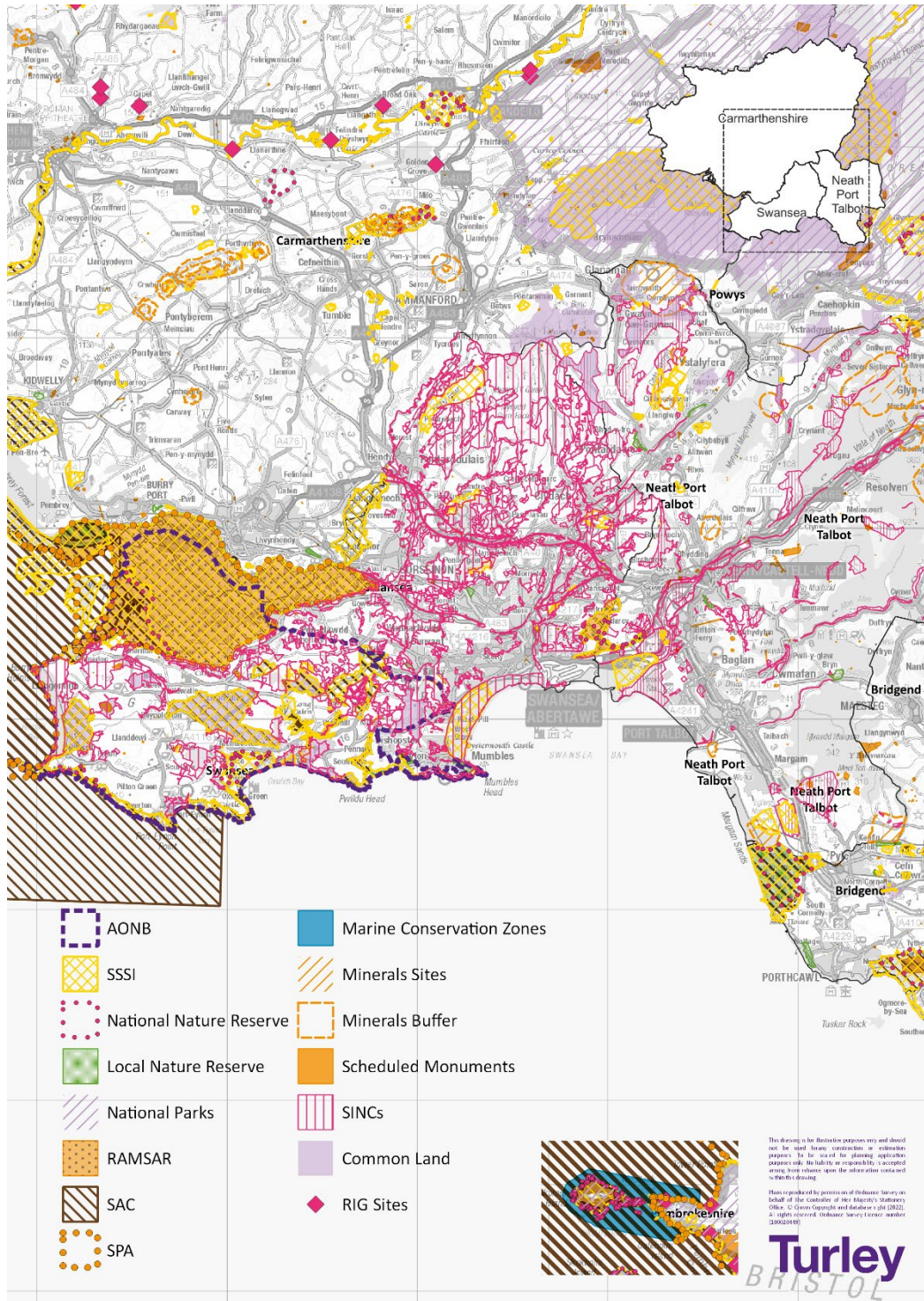
- Special area of conservation (SAC) & Special protection areas (SPA) – All SACs, together with Special SPAs are designated under the EC Wild Birds Directive to protect rare and migratory species of birds.
- Sites of specific scientific interest (SSSI) – Including designations along the coastal areas of the study area.
- National nature reserves: It is noted that all national nature reserves are also SSSIs. In addition, Local Nature Reserves, including marine nature reserves have also been included.
- Ramsar – Internationally important wetland sites running along parts of the coastal area (noting all Ramsar sites are also SSSI).
- Minerals sites and buffers
- Common land

6.6 The mapping of the above layers shows an expansive covering of many constraints, including areas which are broadly considered based on the Future Wales diagram to be within or proximate to the NGA.

6.7 Importantly the layers indicate that the indicative NGA has been drawn in Future Wales to avoid overlapping with the National Park to the north and the Gower AONB.

6.8 Other, environmental designations many of which run along the coastal area directly abut or indeed overlap with some urban areas. In considering these it is important to recognise a hierarchy of significance. The SAC is located off the coastal boundary, surrounding much of the Gower and abutting the coast around Burry Port. The SPA area similarly is limited to areas between the coast including Llanelli and Burry Port. The Gower includes larger areas classified as SSSI with smaller pockets apparent in the more rural hinterlands around Swansea but in most instances some distance from urban boundaries. The Crymlyn Bog, located between the City of Swansea and Neath, is identified as the largest lowland fenland in Wales and classified as a SAC and SSSI (as well as being a National Nature Reserve and Ramsar designated area). Larger areas are covered by SINCS again within the rural hinterlands albeit noting their comparative environmental status as local policy designations as opposed to the other nationally defined constraints considered...

Figure 6.1: Environmental Protection Designations

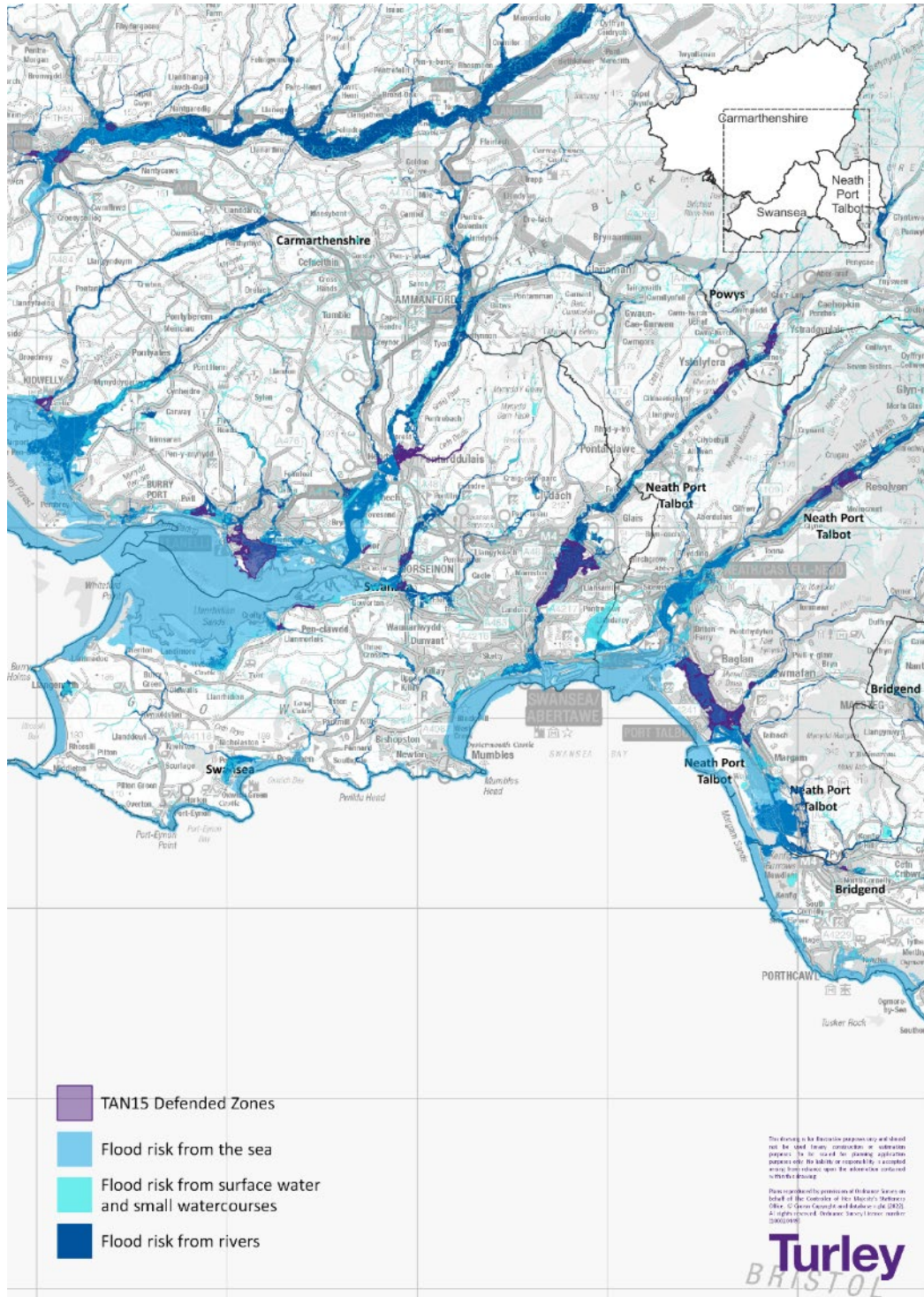


Areas at risk of flooding

- 6.9 The potential risk of flooding represents an important consideration within national policy, with ongoing work to define not only areas which are current flood risk areas, but those which could be subject to the impact of climate change on rising sea levels.
- 6.10 The following layers have been included and mapped:
- Flood risk areas. This includes areas classified as or included within:
 - Flood risk from rivers
 - Flood risk from surface water and watercourse
 - Flood risk from the sea
 - The Flood Map for Planning TAN15 Defended Zones. It is acknowledged that the coming into force of the new TAN 15 and Flood Map for planning has been suspended until 1 June 2023 albeit a letter from WG has confirmed that these designations need to be taken into account in the current process of developing RLDPs.
- 6.11 Looking at the mapped layers it is readily apparent that across the area broadly defined as the NGA within Future Wales there are a number of areas classified as being constrained by potential issues. This includes areas along the main river corridors stretching up to the Valleys in NPT and Ammanford in Carmarthenshire. In the case of the former this also includes some of the urban areas within Swansea. Specifically, it is noted that the area between the A4067 and the M4 is designated as a TAN15 defended zone.
- 6.12 The coastal areas are also designated almost in their entirety as being at risk of flooding from the sea, with this including parts of Baglan and Port Talbot to the east and those parts of Llanelli closest to the coast, which it is noted are also designated as within the TAN15 defended zone.
- 6.13 Overall, it is evident that the risk of flooding is present now and will be more so in the future due to climate change, albeit on the whole affecting areas which already accommodate significant areas of development for both housing and employment, with proximity to the sea an important locational factor in their historic growth.
- 6.14 It is acknowledged that further work is ongoing by the WG to determine the extent and application of the future flooding designations. This will include a consideration as to the extent to which protection measures / mitigation solutions can be identified to enable development in areas which would otherwise be suggested as being at risk of flooding. This will evidently have important consequences for key parts of the urban area, and not least Swansea City Centre.

6.15 Whilst RLDPs and the SDP will need to address the implications of the risk of flooding, particularly in the context of the existing and emerging revised TAN15, the broad nature of the designation of the NGA in the context of the above cannot be directly shaped around those areas most at risk.

Figure 6.2: Risk of Flooding



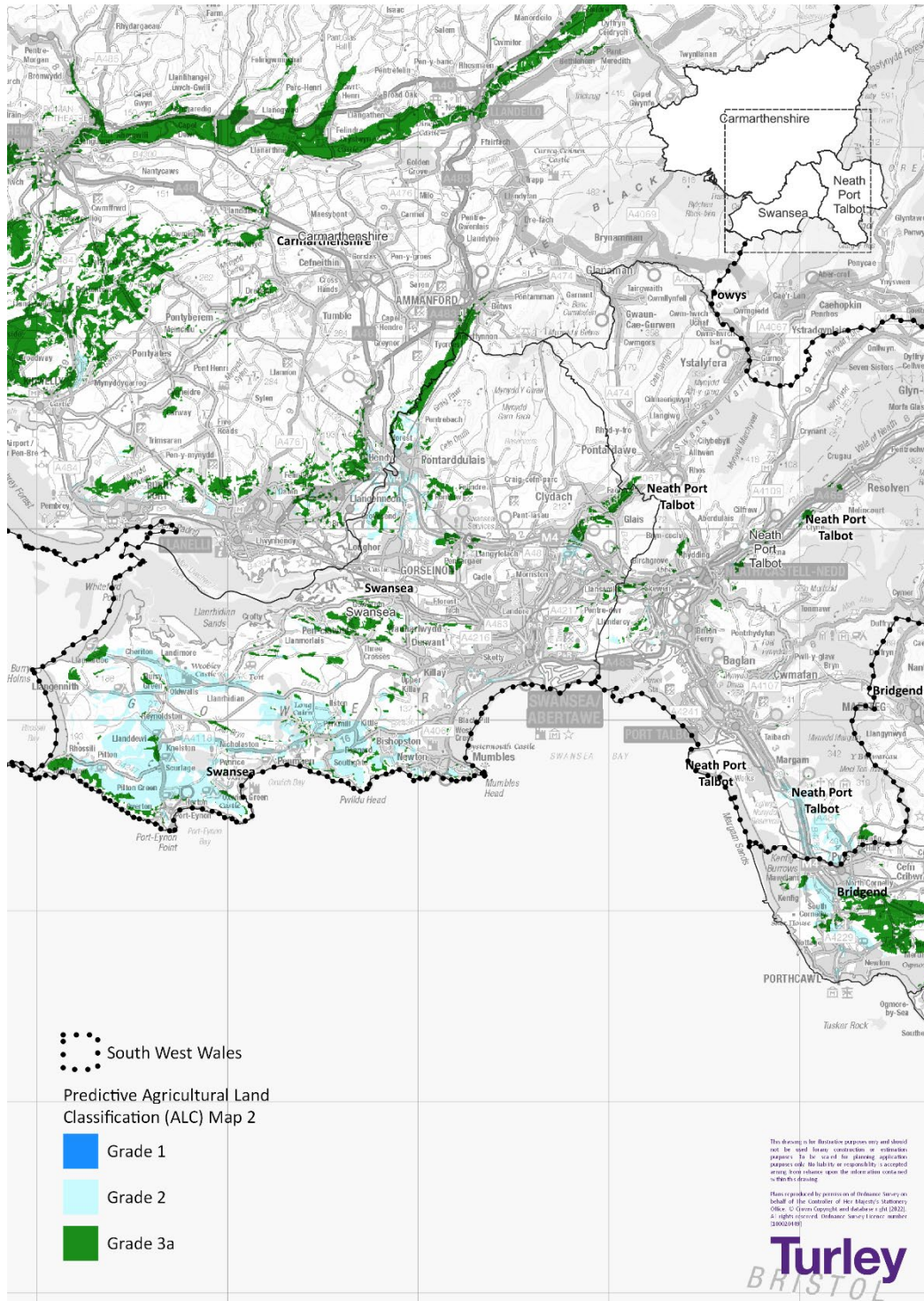
Agricultural land

6.16 PPW identifies that 'The Best and Most Versatile Agricultural Land' should be conserved as a finite resource for the future and considerable weight should be given to protecting such land from development, because of its special performance [Reference: Planning Policy Wales (2021), paragraphs 3.58 and 3.59]. Future Wales also specifically acknowledges the objective of directing growth towards urban areas to relieve pressure on the loss of agricultural land. It includes mapping of those areas of 'best and most versatile agricultural land'. This includes the following designations which have been mapped:

- Grade 1 – excellent quality
- Grade 2 – very good quality
- Grade 3a – good quality

6.17 Spatially it is apparent that those areas in the top two grades are mainly limited to the Gower peninsula and coastal areas as well as up the river valleys up towards both Neath and up into Carmarthenshire. There are also large areas around the most western parts of Pembrokeshire, surrounding Milford Haven and Haverfordwest. There are small areas of grade 3a classified lands to the north of Llanelli as well as larger areas in Carmarthen and Pembrokeshire.

Figure 6.3: Agricultural constraints



Environmental protection policy designations

6.18 The above layers represent important environmental projection areas or reflect the natural value of land. In addition to these it is important to acknowledge that in considering the extent of an area designated as accommodating nationally significant growth it is important to consider existing and potentially

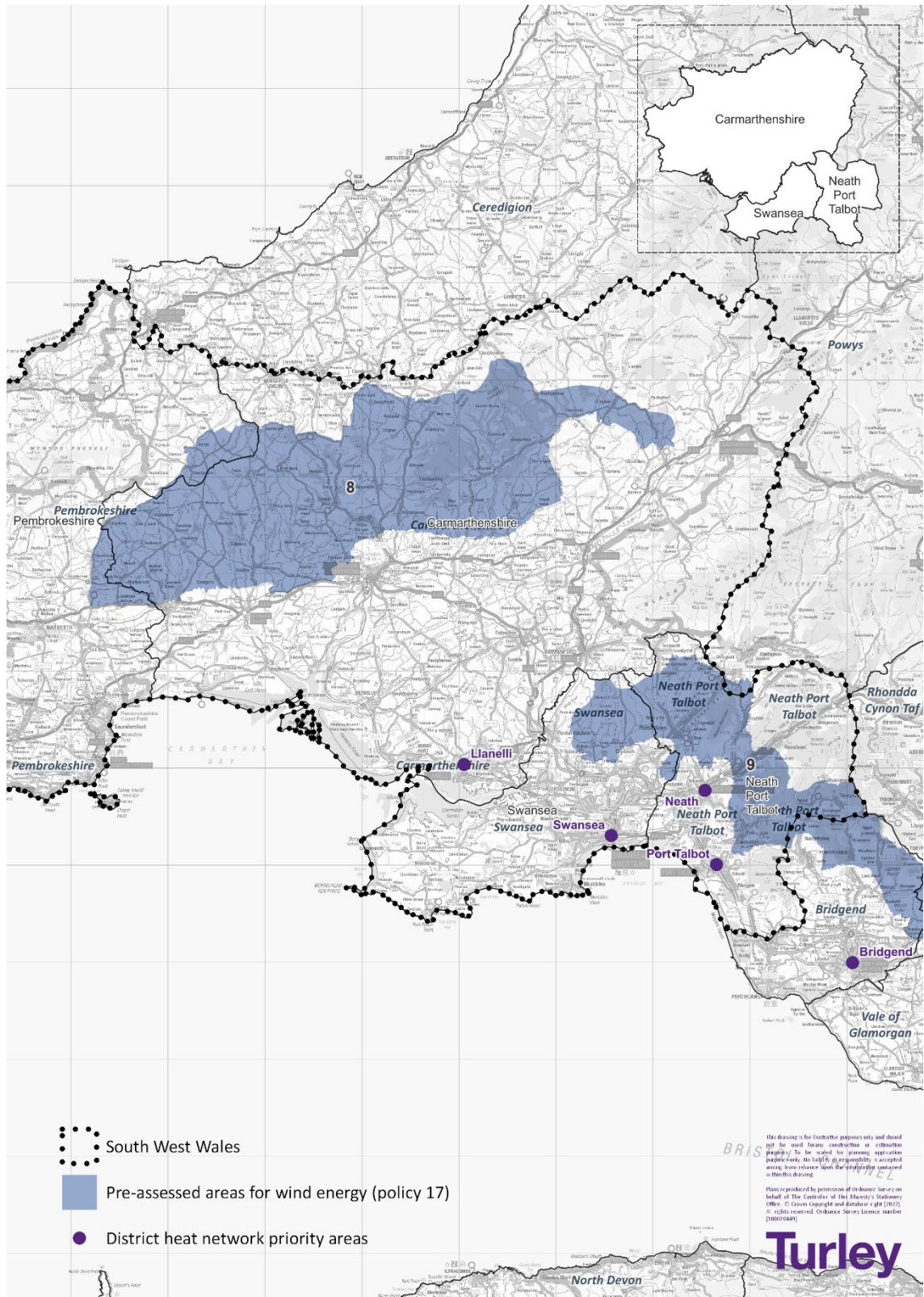
future policy-led designations the intention of which would be to manage development in sensitive areas.

- 6.19 Several maps are presented in this sub-section to consider such designations as identified by the authorities for consideration.

Pre-assessed areas for wind energy and Priority Areas for District Heat Networks

- 6.20 Under Policy 16 Future Wales identifies Priority Areas for District Heat Networks in which planning authorities should identify opportunities for District Heat Networks and plan positively for their implementation. These areas are identified as individual towns and cities in which such Networks are more likely to be viable and therefore have the greatest potential. Neath, Swansea, Llanelli and Port Talbot are all identified as such priority areas.
- 6.21 Future Wales also defines a series of spatial areas under Policy 17 which are designated as 'Pre-assessed areas for wind energy'.
- 6.22 The policy confirms that these are areas where the Welsh Government has modelled the likely impact on the landscape and has found them capable of accommodating development in an acceptable way. The policy confirms that within these areas there is a presumption in favour of large-scale wind energy development (including repowering), subject to criteria subsequently set out in Policy 18.
- 6.23 There is a large designated area which wraps around the northern and eastern parts of Swansea and NPT. This includes within NPT, the settlements of Neath and Port Talbot, with the area then stretching down towards Cardiff in the east. A further designated area is identified in Carmarthenshire wrapping around Carmarthen to the north.
- 6.24 These designations can be viewed as a potential constraint on other forms of development where the delivery of wind energy generation would impact on the proximity in which other development could come forward. However, they also represent an opportunity for sustainably supporting the delivery of housing and employment opportunities which require significant energy inputs as a result of the scale or the nature of usage and their proximity to the NGA also adds to the opportunity to harness sustainable energy generation.

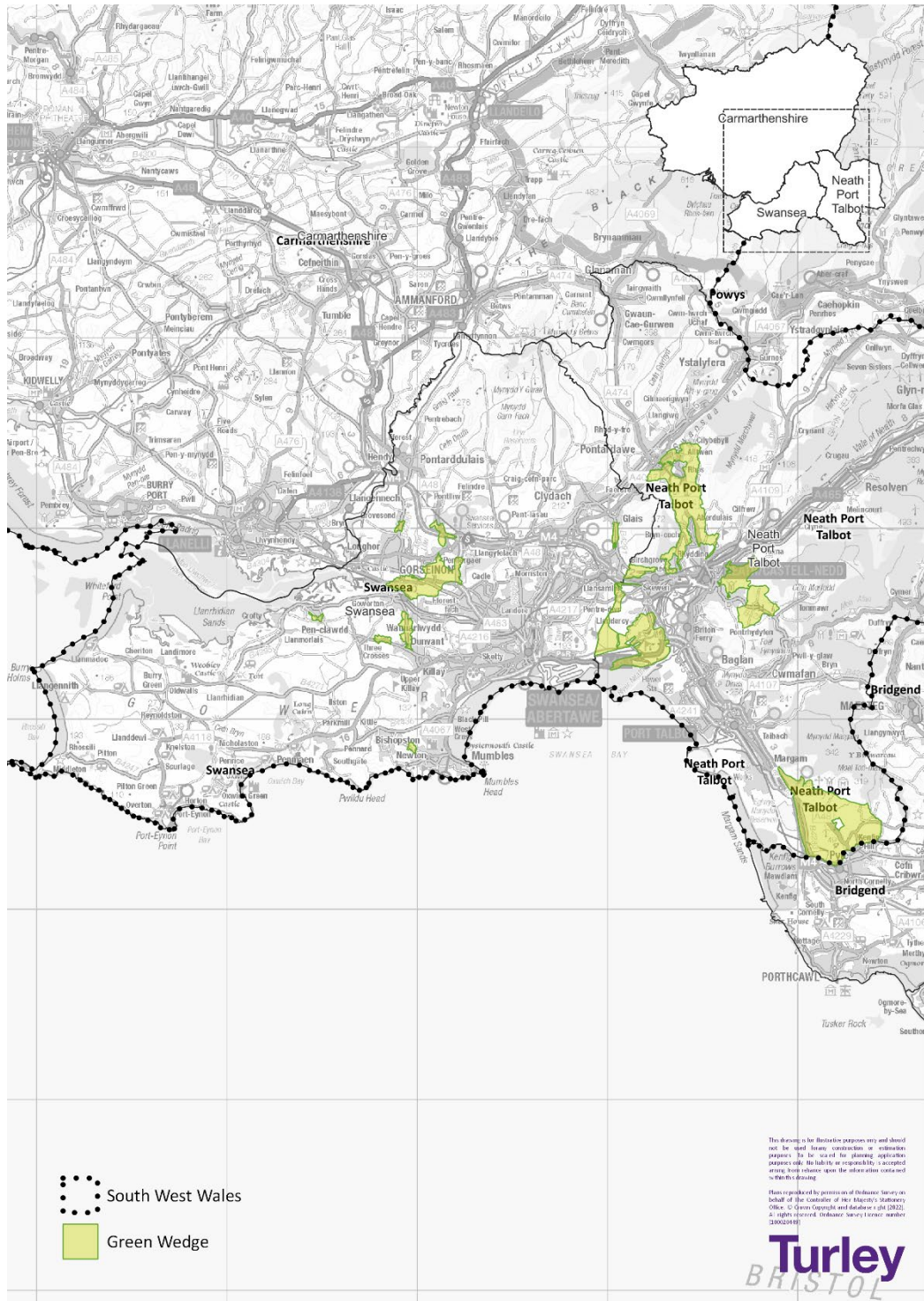
Figure 6.4: Pre-assessed areas for wind energy and Priority Areas for District Heat Networks



Green Wedges and Green Belt

- 6.25 Within Wales there is only one area of Green Belt, between the cities of Cardiff and Newport. Future Wales however through Policy 19 says that as part of the preparation of SDPs consideration should be given to the identification of a number of policy designations including inter alia the identification of green belts, green corridors and nationally important landscapes where relevant. Specifically, with regards to the South West Wales planning region, Policy 30 'Green Belts in the South West' states that: "The WG supports the use of SDPs to identify and establish green belts to manage urban form and growth in the South West, particularly around Swansea Bay and Llanelli".
- 6.26 The supporting text also acknowledges the role that a green belt designation could play in managing growth, particularly the national growth required by Future Wales' spatial strategy and around Swansea Bay and Llanelli, with this reinforced through engagement with the WG as part of the research process. The supporting text also recognises that within the South West Wales planning region there are extensive rural areas and well established rural communities and that the SDP should consider the balance to be struck between focusing development in the main urban areas and the rural areas. PPW identifies criteria for the consideration of the delineation of the Green Belt.
- 6.27 As noted, at the current point in time with the CJC team still to be assembled no work has progressed to determine whether there is a need to identify a Green Belt. This will need to be separately considered with regard to its relationship with the NGA through the development of evidence to support the SDP. Whilst there is no green belt designation it is noted that NPT and Swansea have designated Green Wedges within their adopted Plan.
- 6.28 PPW identifies that Green Wedges are local designations which are intended to prevent urban coalescence and protect the setting of the urban area with a presumption against inappropriate development within the designated areas.
- 6.29 The map below shows the current designated Green Wedges in NPT and Swansea. This shows that their purpose to limit development around parts of the settlements of Neath, Pontardawe and the very eastern tip of Port Talbot. In Swansea the designations are concentrated to the west of the urban area and into the Gower peninsula.

Figure 6.5: Green wedges



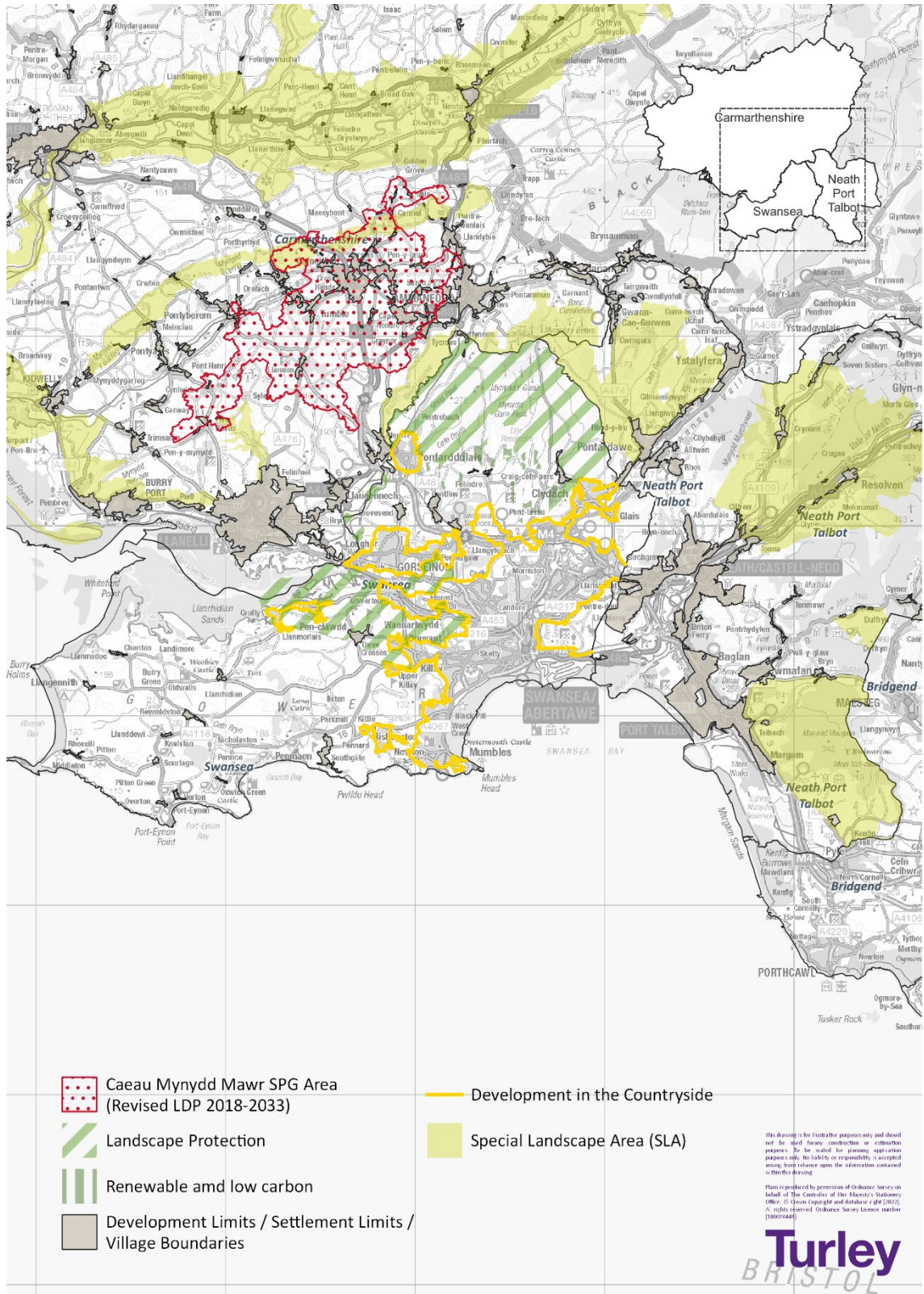
Other landscape / specific policy area

6.30 Across the study area and within individual authorities there are several additional defined further policy designations aimed at protecting spatial areas from the adverse impacts of development. These include, for example:

- Development in the Countryside (Swansea)
- Coast Valleys specific policy areas (NPT)
- Landscape protection (Swansea)
- Special Landscape Areas (SLAs) (Carmarthenshire)

6.31 Within Carmarthenshire the Caeau Mynydd Mawr SPG area is also an important spatial designation within which prescribed mitigation measures are required to offset the impact of development.

Figure 6.6: Other Spatial Policy Constraints



- 6.32 Looking at the mapping of the 'policy' the Caeau Mynydd Mawr SPG area evidently represents a large spatial area, which whilst an established project allows for mitigation measures careful consideration would need to be given to the siting of national scale development within the area to ensure it would be compatible with the habitat management provisions set out in the SPG. There is also a large Special Landscape Area, which surrounds the built-up area of Swansea. Special Landscape areas also extend to the north west of Swansea to the Loughor Estuary.
- 6.33 In NPT parts of many of the large settlements are also protected by adjoining landscape protections, including areas to the east of the M4 in proximity to the Port, as well as the previously considered environmental designations.

Summary

- 6.34 The mapping of fundamental identified constraints confirms that the broad area of the NGA includes many notable designations and areas potentially at risk, for example, from the effects of worsening flooding events.
- 6.35 In the case of flooding many of those areas at risk already accommodate large amounts of development of both housing and employment. It will be for future policy (and future TAN15) to address how further growth is enabled through mitigation measures; however, a more refined spatial definition of the NGA is unlikely to be shaped on the basis of this constraint alone.
- 6.36 Looking at wider environmental constraints the existing Future Wales spatial representation of the NGA is already clearly intended to avoid overlap with some of the more significant peripheral designations, including the Gower AONB and the Brecon Beacons National Park (BBNP). These clearly remain important in the refining of the spatial extent of the NGA.
- 6.37 Other designations, including but not limited to Future Wales's identification of Pre-assessed areas for wind energy, priority areas for future district heat networks and agricultural classifications offer important considerations in determining boundaries between potential areas of growth and adjacent rural areas. This is particularly true again of the northern boundary across NPT and Swansea as well as the transport corridors in Carmarthenshire. Consideration of these designations is therefore important in seeking through any refinement of the spatial extent of the NGA to draw a tighter line around areas of growth and key infrastructure corridors, particularly where they are outside of the areas of existing higher population and employment density as illustrated in the preceding section.

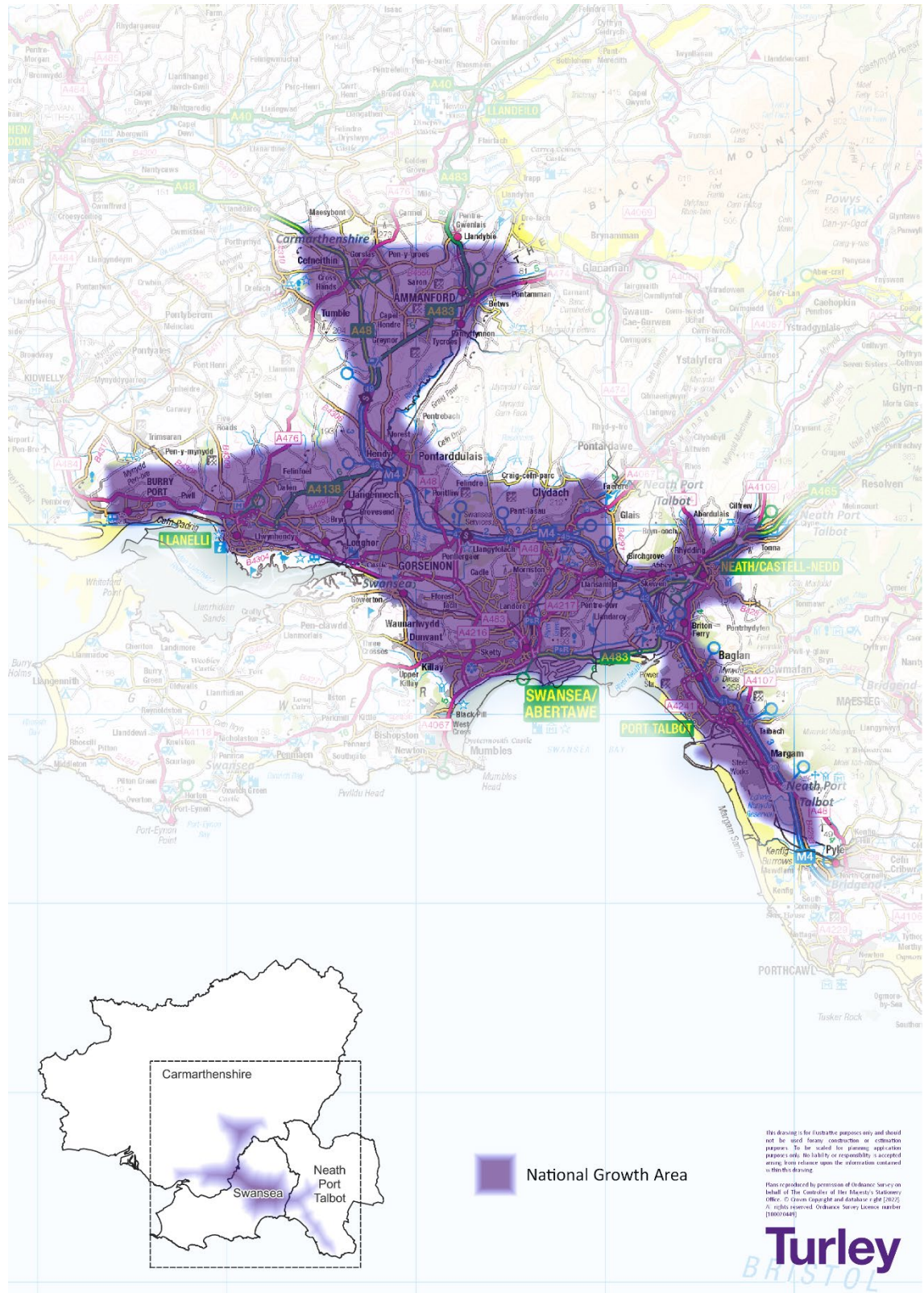
7. Refining the spatial extent of the NGA

- 7.1 As stated in the introduction to this report, it is recognised that it will be the role of the SDP to identify the final spatial extent of the NGA. This section seeks to assist this process, and inform the emerging RLDPs' approaches to distributing planned provision, by drawing together the information from the previous sections.

Recommendations for a refined NGA spatial area

- 7.2 The preceding sections have captured and presented a large amount of information that provides important evidence with which to develop a more detailed view on the extent of a refined NGA. This will form an important basis for the Councils and the CJC to build from in the translation of evidence into a policy definition for the NGA.
- 7.3 To assist in the interpretation of a descriptive outline of a refined NGA, Figure 7.1 provides a spatial illustration. This should not be interpreted as a defined boundary, being both subject to further refinement and interpretation through the SDP process and the availability of more detailed information.

Figure 7.1: An indicative spatial presentation of a refined NGA spatial area



- 7.4 The informing evidence reinforces the importance of including the urban core of the Swansea Bay area, centred around the City of Swansea and the hinterland of smaller towns. This area contains a significant concentration of both people and jobs, and is well served by existing public transport networks.
- 7.5 The northern periphery of the urban core of Swansea is currently defined by the M4. The current LDP recognises the opportunities arising for new development extending to the north beyond the M4. This area encompasses Pontarddulais and Clydach/Birchgrove at either end as well as the strategic development site at Felindre and Morriston Hospital and potential expansion areas. These areas of significantly scaled potential growth will benefit from access to motorway junctions as well as rail improvements, including the planned provision of new stations as part of the Metro investment as well as ongoing investment in wider active travel routes.
- 7.6 Continued investment in public transport infrastructure, including active travel, will offer the opportunity to sustainably accommodate further development beyond the current Swansea LDP designations. The importance of access to public transport and active travel opportunities was emphasised by development sector stakeholders in the engagement undertaken as a fundamental element of sustainable development. This will offer opportunities over the longer-term for more significant growth to achieve positive agglomeration effects from business and transport investment. This is reflected in the broad inclusion of lands across the full stretch of the M4 in Swansea, albeit the exact spatial extent of growth within this area will account for existing environmental and future policy constraints and is likely to be concentrated in those areas benefitting from greater accessibility. In the case of Felindre, for example, the importance of allowing for further potential growth responds to potential investment in public transport linkages and the availability of expansion lands of scale.
- 7.7 To help refine the spatial extent in this part of the SBLNGA north of the M4 in Swansea, the research has taken into account the potential development opportunities and the views of development sector stakeholders in allowing an appropriate area for potential growth over the timescales required. Nonetheless it is proposed to exclude those areas of the County of Swansea further north, which are included within the indicative NGA shaded area in Future Wales, but where this research has shown there is justification to exclude these areas based on the constraints on the likelihood of there being sustainable development opportunities in these more northern areas. This includes , parts of the designated Pre Assessed Areas for wind energy in Future Wales within Swansea and NPT where future strategic development opportunities are unlikely to come forward. It is noted that this policy designation washes over Pontardawe in NPT.
- 7.8 Moving west from Pontarddulais the proposed extent of the NGA extends up the road / rail corridor to Ammanford and Cross Hands. As explained in section

3 of this report, Carmarthenshire County Council has identified the Cross Hands area as having the potential to accommodate a significant amount of new housing (over 1,000 homes) and employment land capable of accommodating thousands of jobs. It is understood that existing and planned investments in public transport networks offer the opportunity to further enhance both demand in the area and the strength of sustainable connections back into the urban core of the NGA. Accommodation of significant growth in this area will serve to reinforce the business case for further transport investment. It is of note that increased focus of population and jobs in this area, coupled with the enhanced infrastructure, could change the current defined travel to work areas (Figure 3.2) extending the footprint of the Swansea centred functional geography.

- 7.9 It is recognised that much of this part of Carmarthenshire is washed over by the Caeau Mynydd Mawr SPG area, with this requiring careful consideration in the accommodation of future development. Similarly, it is anticipated that a boundary to the NGA along the road / rail corridor would be tightly defined, with no intention for significant development sites along the transport network. This recognises that on the eastern boundary there is a natural river boundary, which includes areas of Grade 3a agricultural land. It is noted that other areas with the same agricultural classification fall within a broad boundary around Llanelli, Llangennech and Pontarddulais as well as a number of settlements in NPT and should form an important consideration in the appreciation of the NGA boundary at a more local level in these areas as well. The western boundary of the M4 / A48 road corridor would also need to acknowledge the rural nature of the areas to the west in Carmarthenshire.
- 7.10 Moving south, the western part of the SBLNGA is considered to include the areas running to either side of Llanelli, including Burry Port to the far west, with the spatial extent stretching to the identified local nature reserve. Burry Port is sustainably connected into the Metro and is expected to keep benefitting from investment in the interchange thereby elevating its credentials to sustainably accommodate complementary growth.
- 7.11 This part of the proposed NGA also includes the identified Dafen opportunity area, with this also identified by the Council as an area with the potential to sustainably accommodate a significant number of new homes (over 1,000) alongside employment land which the Council again considers able to accommodate a significant number of new jobs.
- 7.12 Moving across into Swansea from Llanelli, the AONB within the Gower Peninsula is wholly excluded, with the RAMSAR area on the Gower and estuary considered to form an important boundary. This will ensure that the NGA definition supports the continued protection of the AONB and the rural Gower fringe areas on the edge in the context of the anticipated growth of the conurbation area.

- 7.13 As noted above, around from the Gower peninsula the boundary encompasses the city centre of Swansea and the active parts of the coastal area, accommodating existing strong transport infrastructure linkages and the location of the Swansea University Science and Innovation Bay campus in NPT. While parts of this area – like other parts of the NGA – are at risk of future flooding, the existing scale of investment means that careful consideration will need to be given through policy to the role that mitigation measures can play in enabling further growth at the heart of the SBLNGA.
- 7.14 Running along the eastern coastal boundary, the area includes the full extent of Port Talbot and the opportunity areas for further growth stretching down to the boundary with Bridgend. The existing green wedge designation and the national nature reserve are taken into account in forming this boundary at the southernmost point. This area includes the designated Port Talbot Waterfront Enterprise Zone (including the Harbourside Strategic Regeneration Area), J38 allocated employment area and the Tata Steelworks, which employs in the region of 4,000 workers, and Margam as well as the Port itself. This area is also considered to offer a significant opportunity to further grow economic investment of a national scale, with this including the significantly sized Baglan Bay development opportunity.
- 7.15 The final part of the SBLNGA then runs up through NPT to closely align with the existing settlement limits of Neath, incorporating the Coed Darcy Strategic Regeneration Area which is anticipated to have the capacity to deliver 4,000 new homes and significant numbers of new employment opportunities. The spatial extent then runs between Clydach and Pontardawe. Whilst it is acknowledged that the areas further north in NPT, including Pontardawe, have relatively strong functional connections into the core of the Swansea Bay and Llanelli NGA identified opportunities for growth are not considered to be of national scale. It is, however, anticipated that this area will continue to play an important economic role and given its functional linkages will support and benefit from proximity to the SBLNGA.

Future workstreams to support the spatial definition of the NGA in policy

- 7.16 The above attempt to provide a spatial refinement of the NGA has responded to information currently available to inform this research. The continued development of policy, in the form of RLDPs and the SDP, will generate complementary evidence to enable further refinement of the spatial area identified.
- 7.17 It was observed, for example, through engagement with representatives of the residential development industry that submissions to Call for Candidate Sites within the current generation of RLDPs respond to the perceived scale of opportunity. The existence of a more established emerging policy definition for the NGA as part of the preparation of the SDP may in turn prompt the

identification and promotion of more strategic opportunity sites to either accommodate national growth or support the provision of national growth.

- 7.18 In this context it is strongly recommended that individual authorities covered by the NGA spatial area within Future Wales continue to maintain a strong process of engagement with landowners, promoters and developers of employment and residential land to understand the scale and nature of land ownerships and opportunities. Similarly, in order to understand the implication of future strategic infrastructure investment dialogue should be maintained with providers as well as Transport for Wales

Relationships with other growth areas

- 7.19 Whilst Future Wales is clear in the need to designate a geographically distinct NGA, this will not preclude growth from occurring in areas outside of the NGA; complementary growth of other designated areas, such as RGAs in South West Wales; development and growth in settlements to support local aspirations and need; and new innovative economic projects and the relationship to the east to the Cardiff, Newport and the Valleys NGA.

- 7.20 Looking first at other potential innovative economic investment areas which geographically fall outside of the suggested refined spatial extent, the GCRE project (as described in section 3) is one such example.

- 7.21 As outlined earlier in this report, the GCRE is recognised as having the potential to be a world-class development of UK importance, offering the opportunity to put the Valley communities in NPT / Powys at the heart of a new world-class global industry [Reference: App No P20210327 - Global Centre of Rail Excellence.pdf (npt.gov.uk); Link <https://democracy.npt.gov.uk/documents/s71607/App%20No%20P20210327%20-%20Global%20Centre%20of%20Rail%20Excellence.pdf?LLL=-1>], being one of only two such facilities internationally. Its contribution to improving rail travel will also support the delivery of measures to improve national connectivity as set out in Future Wales (Policy 11) and support the overall stated objective to develop and expand rail infrastructure which it identifies will contribute to a stronger, inclusive and more equitable economy by connecting people, communities and businesses across Wales to jobs, services and markets. Furthermore, it will also support the development of a UK digital railway industry by providing high quality and safe testing facilities for digital signalling, train control and asset management technologies. Given its relatively unique status, it could also be reasonably expected to generate new links to business and academia, with opportunities for these to be built with the existing infrastructure in South West Wales, and to act as a catalyst or magnet project for further new opportunities, offering the opportunity for related growth within the area.

- 7.22 The development therefore evidently accords with many of the inferred objectives of the NGA. The GCRE is remotely located away from the primary

concentration of housing, employment and infrastructure within the suggested NGA, however, and at the current point in time it is not envisaged that the investment will lead to significant adjacent growth in the numbers of homes or new employment floorspace. It will evidently assist in elevating the national reputation of the wider area with potential benefits for businesses and residents in the NGA. Separate policy support through the SDP and as appropriate future iterations of the NPT LDP is therefore recommended to recognise the complementary but distinct role that it could potentially offer.

- 7.23 The Haven Waterway, including the EZ, is another example of an arguably nationally significant economic growth opportunity that again falls outside of a reasonably defined contiguous NGA spatial geography. The importance of the investment area is recognised by its separate inclusion in the South West Wales Future Wales spatial diagram and Policy 32 'Haven Waterway and Energy'. This policy recognises the importance of the Haven Waterway to the future energy security of the UK and acknowledges that it is served by ports outside of the Haven Waterway, including Port Talbot and Swansea. This emphasises the importance of these ports individually but also the functional relationship with the NGA, which includes two of these ports, where the ports are further identified as important national infrastructure. The potential for Port Talbot and the Port of Milford Haven to be jointly designated as a Freeport could potentially further strengthen their importance and the functional relationships across the coastal settlements in South West Wales.
- 7.24 The recently published South West Wales Energy Strategy (2022) clearly emphasises the important role that sustainable energy production will play in the development of the region. This specifically cites the Milford Haven: Energy Kingdom (MH:EK) as a key project, supporting the case for the Government to invest in hydrogen alongside the Pembroke Net Zero Centre (PNZC) which was launched in 2021. It identifies this as an area of greater exploration within the region, noting other potential complementary projects as being the Swansea Bay Technology Centre and proximate Hydrogen Centre, further reinforcing the important spatial linkages between the two areas.
- 7.25 It is understood again though given the geographic location of the Haven Waterway that future supportive growth will, according to Policy 32, be accommodated in local and regional communities. This is also reflected by the location of the Haven Waterway within a designated RGA in Future Wales and its relationship with the RGA designation.
- 7.26 Finally, the process of engagement through the research process and indeed Future Wales emphasises the importance of functional national connectivity not only within South West Wales but outside of it. The regional strategic diagram shows national connectivity out from the NGA east as well as west. This recognises the important relationships with the Cardiff, Newport and the Valleys NGA. Whilst it is understood that comparable work is yet to be undertaken to understand any potential refinement of the spatial geography of

this NGA, noting it extends across most of the South East Wales region, the proximity of complementary growth in Bridgend to the easternmost part of the Swansea Bay and Llanelli NGA would reasonably be expected to further strengthen these relationships.

- 7.27 The development of the separate SDPs for the two areas will need to consider the potential for contiguous or distinct boundaries between the NGAs and the complementary roles that they could play in achieving the stated objectives and outcomes of Future Wales.

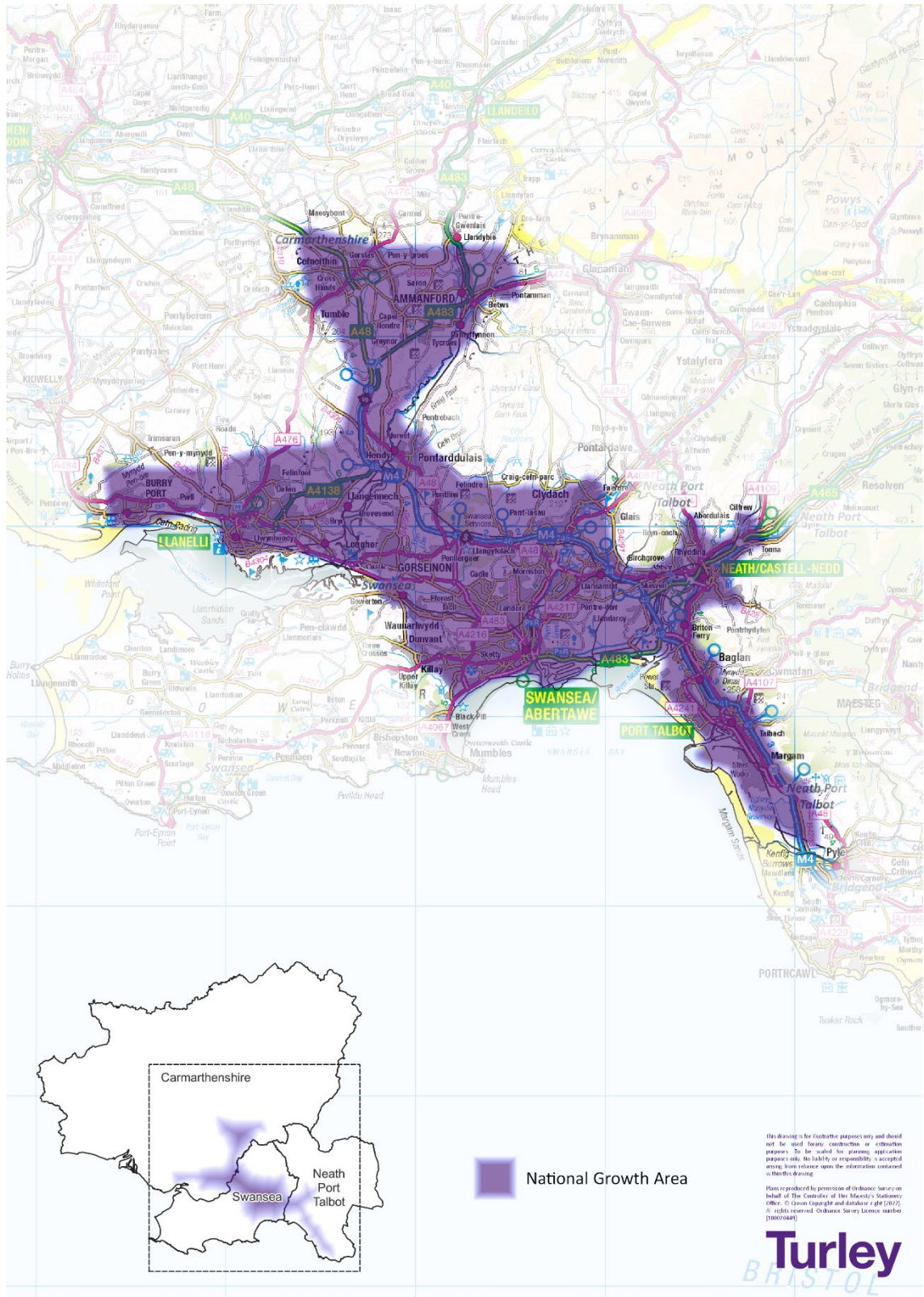
8. Summary and policy considerations

- 8.1 This report has presented the outputs of a research process that has informed a detailed assessment of the SBLNGA.
- 8.2 This has been undertaken to refine the illustrative SBLNGA presented in Future Wales, and inform the production of RLDPs. It is the intention that the assembled work will provide a foundation for subsequent evidence and further refinement to be prepared by the CJC to inform the South West Wales SDP which will need to plan for the growth of the NGA in accordance with Future Wales Policy 19.
- 8.3 The previous section described the outline of the refined spatial extent of the NGA in accordance with this objective. This has been arrived at through a process of engagement with the individual authorities and a layering of spatial data using GIS. It has also drawn upon separate engagement with other stakeholders, including key businesses, housebuilders and the development sector, and Welsh Government. The commissioning authorities recognise that it will be the responsibility of the CJC appointed SDP team to undertake further engagement and seek to achieve full and formal consensus on the NGA boundary in the future.
- 8.4 In this summary section, the illustrative refined spatial area is presented alongside a brief description of the key areas proposed for inclusion and exclusion in this refined spatial extent. It is important to note that this is not intended to provide a definitive boundary that applies for development management purposes.
- 8.5 For the avoidance of doubt, this report carries no weight in the determination of planning applications and does not form part of the development plans for the councils.

An indicative spatial presentation of a refined NGA spatial area

- 8.6 The following area was presented in section 7 to assist in the interpretation of its description of an outline for a refined NGA geography.

Figure 8.1: An indicative spatial presentation of a refined NGA spatial area



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8.7 Without repeating the previous section, key areas recommended for inclusion within the refined spatial extent include:

- The Swansea Bay urban area, which includes the built-up area of Swansea – including the city centre – and forms the central focus for the NGA;
- Areas of planned and potential future expansion to the north of the M4 running along the top of the Swansea urban area, and accounting for planned investment in the Metro. This stretches between Pontarddulais and Clydach;
- The coastal corridor of Neath and Port Talbot stretching along the M4 / GWR corridor and closely following existing settlement limits of these two urban areas and recognising the linkage through Neath, via the A465, into the Midlands in England. This corridor includes the Coed Darcy regeneration area, Neath Town centre, Baglan Bay and the Port Talbot Waterfront EZ and existing Tata Steelworks.
- The coastal corridor stretching from Burry Port through Llanelli and including the Dafen opportunity area, again reflecting investment in the Metro and enhanced connectivity; and
- Ammanford and Cross Hands and the road corridor along the M4 / A48 linking development areas to the Swansea urban core and recognising ongoing and future investment in the rail network to enhance services;

8.8 Reflecting the mapping of potential constraints, the following areas are recommended to be excluded from the refined SBLNGA spatial area as part of this work:

- Areas within the Pre assessed areas for wind energy defined in Future Wales within the County of Swansea and NPT where strategic development opportunities are unlikely to come forward;
- Areas further to the north of the Swansea urban area within Landscape Protection designations; and
- The Gower Peninsula AONB including the rural fringe areas and the RAMSAR area stretching across the estuary.

Policy considerations

8.9 Consideration is given in this final sub-section to potential policy considerations arising from the designation and application of the NGA spatial geography. This considers the potential issues arising from the transition of the current generation of LDPs subject to review and the parallel development of an SDP over a potentially longer timeframe. It also reflects on specific issues which have been raised through the process of engagement within this research by

those tasked with eventually implementing any policy designation and those who will be responding to its geography in the promotion and submission of sites and applications for development.

Application of the NGA designation

- 8.10 The proposed spatial refinement of the NGA is intended to assist with the development of spatial strategies in RLDPs. Where the RLDPs will potentially identify spatial areas of growth, taking into consideration the extent of the refined SBLNGA, in line with Future Wales Policy 1, this will not prevent the identification of growth areas and development outside of the suggested spatial extent of the NGA area.
- 8.11 It will be the role of the SDP Team/ CJC to define the extent of the SBLNGA boundary and to present a specific policy approach to reflect its delineation within the SDP.

Longevity of the boundary

- 8.12 Future Wales looks forwards to 2040. As part of the work to inform the SDP the final defined boundary of the SBLNGA should be considered within this timeframe.
- 8.13 In this context it is important, as described in section 5 of this report, to acknowledge that the final boundary should not be constrained by current recorded call for sites submissions at the time of SDP definition or historic allocations in LDPs (recognising that the NGA will cover a longer time period than that for the SDP). This point was also emphasised by developers in the stakeholder engagement. It should instead assist in shaping the future identification of a generation of land opportunities for national growth to meet needs over a longer timeframe.
- 8.14 This approach is in line with work which has been undertaken as part of this study to refine Future Wales' spatial representation of the NGAs. It is recognised that there will be events which will require a review of this refined spatial extent to ensure it reflects up-to-date policy and data driven constraint designations (e.g. flooding or environmental protections) at the time of definition by the SDP team/ CJC.
- 8.15 The SBLNGA spatial representation in Future Wales has been refined to be able to respond where necessary to opportunities which present themselves in the form of extensions to current areas of employment or residential concentrations which are made more sustainable as a result of infrastructure investment beyond that currently known or envisaged. It is suggested that this flexible approach should be carried through the definition of the boundary by the SDP team/ CJC.

The specificity of a defined geographical area

- 8.16 In accordance with the project brief the research has suggested a refined spatial extent of the geographical area defined in Future Wales for the SBLNGA in a spatial description and illustrated using a non-defined/fuzzy boundary.
- 8.17 This recognises that the development of the SDP evidence base will build upon this research and apply any refinements necessary to accommodate additional detail around the definition of local growth areas, opportunity sites and potential constraints.
- 8.18 Where it will be for the SDP to determine a final boundary, the research has prompted debate around the benefits and drawbacks that could result from using a firm boundary. Specifically, the following observations were raised:
- In the application of planning policy, the designation of a “red line” removes any ambiguity around whether a site is within or outside the NGA, thus helping to provide certainty. It also enables the scale of development within and outside the NGA to be monitored and quantified with more certainty; and
 - The permanence of a clearly defined NGA boundary could, however, risk constraining the continuation of growth on specific sites or settlements. A more flexible boundary would enable a more responsive approach to enabling and supporting growth in areas where demand / need has proven to be high.
- 8.19 It will be important that careful consideration is given to these alternative viewpoints in striking the right balance in determining the nature of a defined boundary within the SDP.

Appendix 1: Overview of engagement

As set out in section 2 of this report engagement was undertaken with a number of stakeholders in order to inform the research. This appendix includes a summary of the key points raised through the engagement process.

Welsh Government

- Positive reception to the scope and rationale for the work
- Discussion around opportunities / benefits of non-contiguous boundaries of the NGA
- Emphasised the importance of demonstrating alignment with Future Wales policy and expected outcomes as well as the stated rationale of the designation of an NGA
- Highlighted importance of acknowledgment of constraints, including those set out in Future Wales e.g. pre-assessed areas for wind energy
- Highlighted potential consequences of the unpublished Road Review and emphasis on sustainable transport connections
- Identified consultation on draft guidance for the preparation of SDPs, opportunity to re-assess study outcomes in the context of this as the SDP is developed.

Adjacent authorities (Pembrokeshire, Bridgend and Powys)

- Acknowledgment that the broad NGA definition did not extend outside of NPT, Swansea and Carmarthenshire.
- Discussions with Powys around the benefits / potential for the inclusion of the GCRE as non-contiguous identified component of the NGA.
- Recognition that the Regional Growth Hub in Pembrokeshire has important links with the NGA and indeed is in itself of national significance with regards transference of energy.
- Acknowledgement that there will be strong inter-relationships with the South East NGA once defined, noting the M4 connection and the proximity of large areas of growth on the boundary.
- Noted decision awaited with regards location of a regional hospital in West Wales.

Residential sector workshop (including the HBF)

- Strong recognition of the emphasis placed on development opportunities where possible to provide sustainable and active travel connections. Recognition that peripheral areas with poor connections would not present opportunities for growth based on current Government policy.
- Understanding of the importance of future transport investment is therefore an important informing component of understanding the scale of the NGA.
- Importance of thinking beyond the current round of RLDPs and specifically call for sites exercises. The NGA will need to have a longevity to its definition and therefore a consideration of its geographic scale should not be constrained to sites currently identified / submitted to LDP processes. Similarly it needs to recognise a level of flexibility and shouldn't be constrained by immediate economic challenges / threats.
- In the context of the above it was noted that the call for sites exercises may not pick up all opportunity sites as landowners / agents could be influenced by increased certainty around, for example, the NGA definition or longer-term transport investment.
- Highlighted the importance of maintaining engagement between the authorities and the development industry in order to ensure that the identification of land informs and responds to emerging strategic policy development.
- Discussion around the pros and cons of the NGA being defined by a 'red-line boundary'. Acknowledgment that opportunity to provide certainty from a translation of planning policy but also potential to constrain reasonable and helpful level of flexibility.

Transport for Wales

- Affirmed importance of sustainable travel investment and the process undertaken to establish the business case for investment.
- Recognition that planned growth in homes (customers) and jobs (commuters) will have a bearing on future investment decisions. Specific discussion, for example, on Ammanford where some investment has occurred to increase regularity of services but still comparatively limited connections but increased demand would impact on future investment decisions.
- Overview of latest position regards investment delivered and planned for the Metro

Local businesses

- Widespread recognition of a labour market geography extending along the M4 Corridor (especially eastwards towards Cardiff), and labour market integration across the main urban areas of the identified NGA.
- Supply chain links and the customer base varied by sector (some manufacturing businesses are substantially internationalised, for example). But some in construction, installation and service activity noted a wider market area extending along the M4 Corridor and into the South West of England.
- Supply of premises was cited as a common challenge, especially 'grow on' space for businesses seeking to expand. In some cases, this was reported as leading to sub-optimal expansion decisions (for example, the acquisition of second and third facilities in neighbouring towns to ensure capacity, although integrated single-site facilities would be preferable). There was evidence of firms moving between areas to secure adequate premises (between the NGA authorities, as well as (for example) between NPT and Bridgend).
- There were mixed views on labour supply. Some businesses expressed significant recruitment challenges (including as a result of the increased ability to work remotely enabling some people in the area to secure better-paid work further afield) [Reference: This is consistent with the results of the most recent employer survey reported by the South West Wales Regional Learning and Skills Partnership]. One regional business (located in a rural area) expressed plans to open a second facility further east along the M4 Corridor to take advantage of the larger workforce pool that may be available.
- In parts of the manufacturing sector, the area's industrial 'legacy' is important, with some workforce skills derived from large industrial employers, some of which have downsized or disappeared over the years. Replacing this skills base is a challenge as the workforce ages.

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