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INCLUSIVITY TRADE-OFFS

CARDIFF CAPITAL REGION PROFILE

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Introduction

This profile of the Cardiff Capital Region describes the regional context in relation to the economy and the potential for economic growth. It explores the region's performance in relation to productivity, inclusivity and sustainability.

The first section of the report describes the Cardiff Capital Region (CCR) City Deal, covering the history, priorities, and planning framework of the region and the CCR City Deal. The second section presents and discusses statistics on six key and interrelated aspects of the economy that have been identified: innovation, business, infrastructure, people, place and the environment.

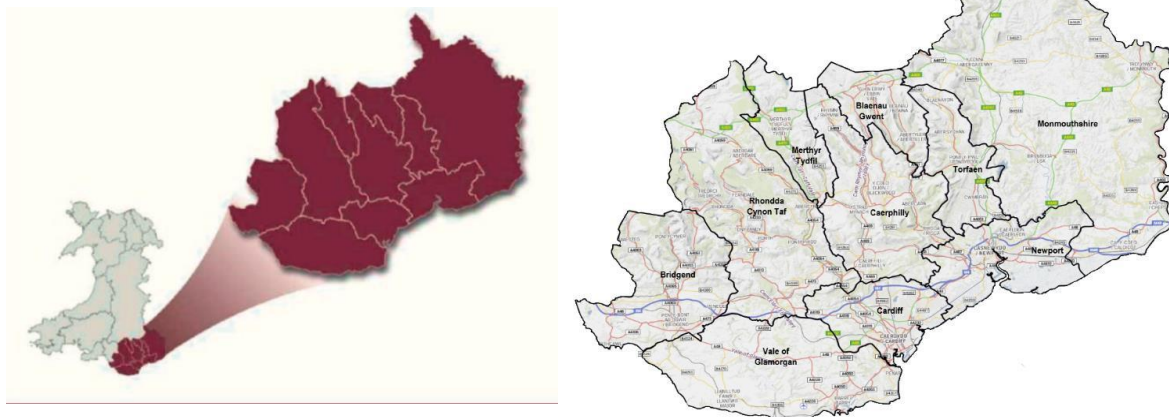
The Cardiff Capital Region City Deal

Cardiff Capital Region (CCR) City Deal is a regional development programme agreed in 2016 between the UK and Welsh governments, and 10 local authorities in the South East Wales region (Cardiff, Newport, Caerphilly, Bridgend, Torfaen, Blaenau Gwent, Merthyr, Monmouthshire, Rhonda Cynon Taf and Vale of Glamorgan (Figure 1)). It is one of four growth agreements for Wales: the North Wales Growth Deal was announced in 2018; the Mid Wales Growth Deal was announced in 2019; and the Swansea Bay City Deal was announced in 2017. The Growth Partnerships and City Deals function in a similar way to the Local Economic Partnerships in England.

The CCR City Deal is a 20-year investment contract of £1.2 billion, which aims to develop and grow the region in line with the National Development Framework 'to bring about significant economic growth in the region through investment, upskilling, and improved physical and digital connectivity' (CCR, 2019a; CCR 2019d:4). Of the £1.2 billion investment, £500m will be contributed by both the UK and Welsh governments, and at least £120m will be contributed by the local authorities over the 20-year investment period. A further £734m will fund the South Wales Metro. Other investments will improve transport connectivity; increase skill levels; support people into work; increase house building; and support businesses to grow¹ The CCR City Deal has targets of creating 25,000 new jobs, a 5% increase in GVA, and leveraging £4bn of additional investment by 2036 (CCR, 2019b).

The South East Wales region corresponds to the former counties of South Glamorgan, Mid Glamorgan and Gwent. The region has the highest population density in Wales. Home to the two cities of Cardiff and Newport and the previous industrial heartland of the South Wales Valleys, it is the most urbanised part of Wales. This means that the region is the centre for a large proportion of all businesses in Wales. These concentrations have created a region of contrasts, with large pockets of both prosperous and deprived communities.

Figure 1: Local authorities in South East Wales



¹ <https://www.cardiffcapitalregion.wales/about/>

Frameworks, stakeholders and implementing agents

While the National Development Framework, the Wales Spatial Plan and Planning Policy Wales have all been important in shaping the development of the CCR, the Welsh and UK governments have also played a central role. Areas where the Welsh Government is working in partnership with local authorities and the UK government include setting priority areas for the overall development of Wales such as housing, energy needs, affordable heating, investing in renewables and job creation.

Apart from the CCR, the CCR City Deal and the industrial strategies, other key stakeholders are involved in the development of the region. These include the local authorities, businesses, educational and skill training providers.

The 10 local authorities formed the CCR [Cabinet](#) to coordinate and oversee the delivery of the programme. The CCR Cabinet is responsible for the integrated strategic development plan of the region. The Cabinet is also responsible for the CCR City Deal, which sets the direction and framework of regional economic growth and development, including setting priority areas for investment and funding.

Priorities and investment areas

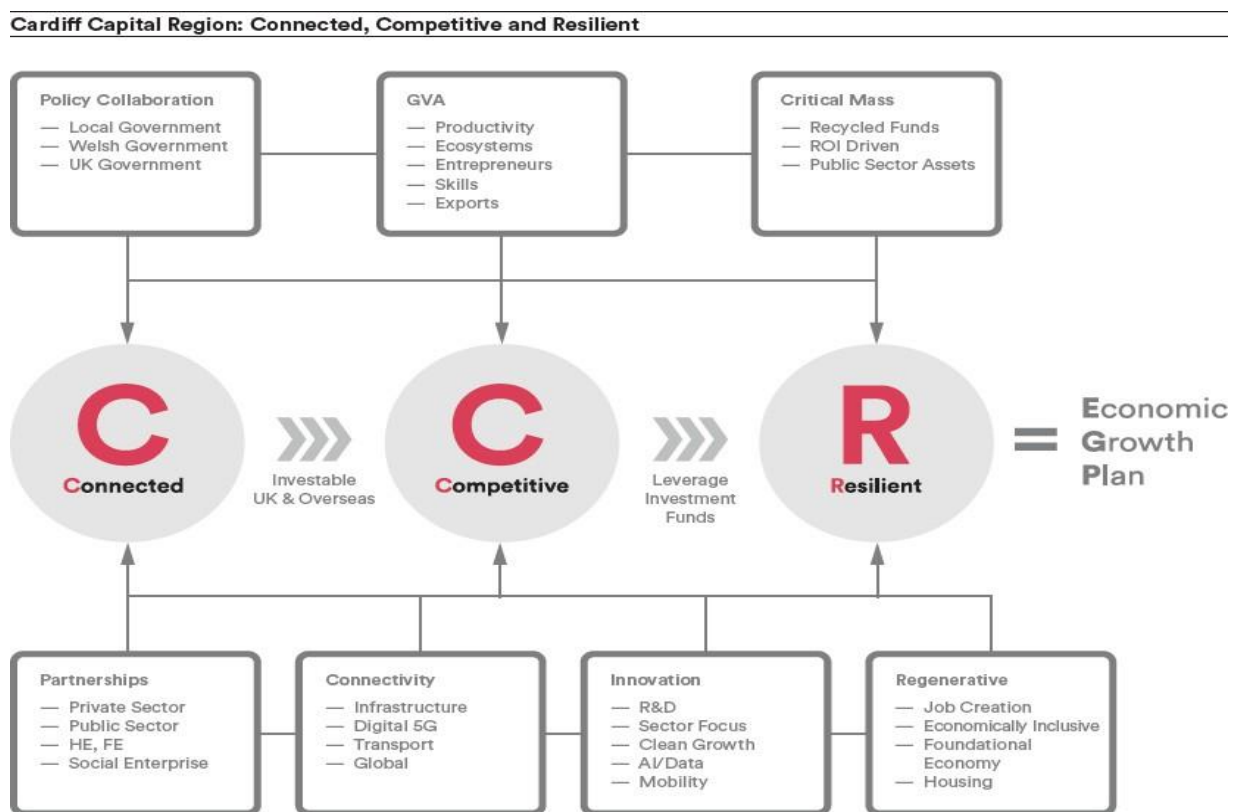
The CCR Investment Framework, developed with the regional economic growth partnership, outlines investment in the three priority areas of innovation, infrastructure and challenge. The investment areas reflect the priorities of the CCR City Deal targets around the core growth principles of connectivity, competitiveness and resilience (Figure 2) within its 20-year Industrial and Economic Plan. The investment plan focuses on deploying the £495m Wider Investment Fund and leveraging £4 billion in additional private capital. Key business sectors that have been targeted as priorities include compound semi-conductors, fintech, cybersecurity analysis, artificial intelligence, creative economy, life sciences, transport engineering, energy and the environment.

Priorities set for the CCR City Deal include:

- Mechanisms to support high-growth sectors;
- The development of new facilities and employment sites;
- New approaches to public service delivery;
- Investment in intellectual property creation and commercialisation;
- Adding value and complementing existing innovation support;
- The software academy in Newport and related programmes across the region; and
- Developing a cyber-security academy with the University of South Wales.

A mandatory component of the CCR City Deal and for subsequent investment has been the development of industrial and economic plans to develop partnerships with the private, academic and third sectors. The plans are to be based on common goals that support prosperity, reduce inequality and improve the environmental sustainability of the region. The plans are also to reflect agreed principles of working and collaboration through the delivery of concrete projects.

Figure 2: South East Wales economic growth plan



Source: CCR Industrial and Economic Growth Plan (South East Wales)

The devolution process and recent reforms to strengthen local government

Since the devolution of the local governance structure in Wales and the passing of the White Paper Consultation on reforming local government in 2018, there has been a shift in emphasis on public service governance and the effective delivery of services (NAWC, 2018). These reforms defined the working arrangements of local government within the regions, strengthened the role of the council and its members and provided a framework for any future mergers.

For an overview of the governance structure for the CCR City Deal and the devolution arrangements in Wales over time, see Appendix A.

The national and regional policy context

A number of strategic national and regional documents have been drawn on for the development of the CCR City Deal.

Launched in 2019, the National Development Framework (NDF) is the key strategic document and the main development plan document for the period 2020–40. Covering the whole of Wales, the NDF embodies the key national priorities of a resilient, sustainable and a decarbonised economy. It sets the direction for investment in economic areas that support the greater good, such as infrastructure and development (NDF, 2019; Webb et al, 2017). Strategic Development Plans (SDPs) cover regional and sub-regional planning, and Local Development Plans (LDPs) cover planning at the local authority level (NDF, 2019). SDPs and LDPs should be aligned with the objectives and national priorities of the NDF at a regional and local level (Figure 3).

Figure 3: The NDF's vision for the development of South East Wales



Source: National Development Framework 2020–40

Another key policy for the economic development of Wales is the Planning Policy of Wales (PPW), which promotes economic, social, environmental and cultural wellbeing as embodied in the Planning (Wales) Act, 2015 and the Future Generations Act 2015. Both the PPW and the NDF are critical in the effective delivery of LDPs and SDPs at a national, regional and local level. All policies, planning and activities need to align with and embed the goals in the Well-being of Future Generations Act (Wales) (2015), addressing the four aspects of well-being — social, economic, environmental and cultural. These key principles of sustainability and wellbeing are embodied within the NDF and PPW, and are used as guidelines for the CCR City Deal and the Economic Action Plan. The delivery of these goals should also be included in any public and private investments initiated in Wales in partnership with the local authorities.

Figure 4 shows the positioning of both the PPW and the NDF as the overarching framework, and how they ensure that key policies, developments plans, place plans and manuals have embedded the goals of sustainability and wellbeing goals, in line with the legislation. The aims and objectives set out in the NDF, PPW and the Wellbeing Plans are also to be embedded in the LDPs and SDPs (see Figure A3 in Appendix A).

Figure 4: The policy and planning framework

Legislation			
Planning Policy Wales	NDF	Wellbeing Plans (Local/Regional Strategies; Plans * & Evidence)	
Development management manuals	Development plans manual	Development plans	Place plans

Source: Planning Policy Wales, 2018

Other policy documents:

- The Welsh Spatial Plan, which was developed in the early 2000s and was last updated in 2008, provides high level strategic guidance and a framework for collaborative action (Welsh Government, 2016). It was adopted by the National Assembly for Wales in 2004 and tentatively covers a 20-year period (2004–2024). The plan identifies six different areas within Wales (North West, North East, Central, South East, Swansea Bay and Pembrokeshire).
- The Regional Economic Framework for South East Wales, developed in 2015, focuses on economic growth, inclusivity and promoting wellbeing and sustainability and this informed the approach to the development of the South East Wales strategy.
- The draft Local Government (Wales) Bill, introduced in 2016, focuses on collaboration and merging local authorities for the effective delivery of services through a reformed legislative framework and regional strategies and frameworks (Welsh Government, 2015; NAWC, 2018).

Other important strategic documents for Wales and the South East Wales region, and which have informed the framing of the deal include:

- [Prosperity for All, Economic Action Plan](#) (2017)
- [City Deals and the Regional Economies of Wales](#) (2017)
- [CCR City Deal MoU](#) (2016)
- [CCR City Deal, Strategic Business Plan and Wider Investment Fund](#) (2018)
- [CCR Industrial and Economic Plan](#) (2019)
- [CCR Investment Framework](#) (2019)

Key statistics

This section looks at the performance of the CCR in terms of measures of prosperity, inclusivity and sustainability, and compared to other regions in Wales and the UK. Data for Wales and comparative data for gross value added are also provided. This is followed by more detailed discussions of the six key themes and their importance for the region's development: innovation, business, infrastructure, people, place and the environment.

Performance in relation to prosperity, inclusivity, and sustainability

Table 1 shows the extent to which performance changed over the period 2013–2018 in the CCR and the other regions.

Table 1 Changes in performance in prosperity, inclusivity and sustainability in all regions for 2013–2018

CHANGE (2013–2018)	PROSPERITY	INCLUSIVITY	SUSTAINABILITY
CCR	MEDIUM	MEDIUM	MEDIUM
MWGD	MEDIUM	HIGH	LOW
NWGD	LOW	LOW	MEDIUM
SBCR	MEDIUM	MEDIUM	MEDIUM

Mid Wales Growth Deal (MWGD); North Wales Growth Deal (NWGD); Swansea Bay City Region (SBCR). LOW = Lowest quartiles; MEDIUM = quartiles 2 and 3; HIGH = highest quartile

Table 2 shows the performance of the CCR compared to other regions in 2018. The results for the CCR show that the performance in all three measures is medium and remained constant between 2013 and 2018 compared to other regions.

Table 2: CCR performance in prosperity, inclusivity and sustainability, 2018

LEVELS (2018)	PROSPERITY	INCLUSIVITY	SUSTAINABILITY
CCR	MEDIUM	MEDIUM	MEDIUM
MWGD	LOW	LOW	MEDIUM
NWGD	LOW	MEDIUM	LOW
SBCR	LOW	MEDIUM	LOW

Mid Wales Growth Deal (MWGD); North Wales Growth Deal (NWGD); Swansea Bay City Region (SBCR). LOW = Lowest quartiles; MEDIUM = quartiles 2 and 3; HIGH = highest quartile

Table 3 presents the results for the CCR, indicating the performance of the CCR and other Welsh regions in relation to all other regions in England (LEPs and CAs), Wales and Scotland. Figures for the UK are also provided as a baseline to assess regional performance according to the latest data and over a five-year period.

Table 3: Key statistics for prosperity, inclusivity and sustainability for 2018, and percentage change for 2013–2018

	CCR		UK	
	2018	% Change 2013–18	2018	% Change 2013–18
PROSPERITY				
GVA per/hour	90.0	-0.379	100	2.0
Median gross weekly pay for full-time workers	516.7	7.44	568.3	9.8
Employment rate 16-64	73.2	7.01	75.0	5.3
% of total employees in low pay sectors ²	34.1	-2.84	33.7	-1.7
% of workers in high-skilled occupations (SOCs 1, 2, 3)	14.8	9.62	14.9	5.5
% of working-age population with NVQ Level 2+ quals.	73.5	5.15	74.9	3.7
INCLUSIVITY				
% in-work households with and without children receiving child and/or working tax credits	23.7	-27.96	22.1	-29.1
20:20 ratio of median weekly pay (gross), ft workers	2.20	-3.08	2.27	-0.02
Ratio of lq. house price to lq. earnings ³	5.3	1.92	7.3	11.1
Life expectancy (females)	82	0.12	82.9	0.2
% of total connections receiving superfast broadband (>= 30 Mbits) (years = 2016-18)	55.6		55.3	36.5
% of workless households	16.5	-18.31	14.5	-16.2
SUSTAINABILITY				
CO2 per capita emissions (t) (years = 2017, 2013-17)	5.3	-20.89	4.5	-23.7
Total residual fuel consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	0.21	-4.54	0.3	-9.3
Total transport energy consumption, tonnes of oil equivalent per capita (years = 2017, 2013-17)	.58	0	0.57	-0.3
Motor vehicle traffic per capita, vehicle miles ⁴	5530	5.03	5083	4.2
Municipal waste generation, tonnes per capita ⁵	.48	0	0.66	-4.3
% of household waste sent for recycling/reuse/composting ⁶	51.5	16.25	43.0	-0.5
















² UK = Data for Great Britain

³ UK = Data for England and Wales

⁴ UK = Data for Great Britain

⁵ UK = Data for England, 2014-18

⁶ UK = Data for England, 2014-18

PROSPERITY	£90 GVA per/hour (index) (UK=100)  -3.79% 2013-18	£516.7 Median gross weekly pay for full-time workers  7.44% 2013-18	73.2% Employment rate 16-64  7.01% 2013-18	34.1% of total employees in low pay sectors  -2.84% 2013-18	14.8% of workers in managerial, professional and technical occupations  9.62% 2013-18	73.5% of working age population with NVQ2+ quals  5.15% 2013-18
INCLUSIVITY	23.7% In-work households receiving child and/or working tax credit  -27.96% 2013-18	2.20 20:20 ratio of median weekly pay  -3.08% 2013-18	5.3 Ratio of lower quartile house price to lower quartile earnings  1.92% 2013-18	82% Life Expectancy (females)  .12% 2013-18	55.6% of total connections receiving superfast broadband	16.5% of workless households  -18.31% 2013-18
SUSTAINABILITY	5.3 CO2 per capita emissions  -20.89% 2013-17	0.21 Total residual fuel consumption, tonnes of oil equivalent per capita  -4.54% 2013-17	0.58 Total transport energy consumption, tonnes of oil equivalent per capita 0% 2013-17	5530 Motor vehicle traffic per capita, vehicle miles  5.03% 2013-17	0.48 Municipal waste generation, tonnes per capita 0% 2013-17	51.5% of household waste sent for recycling/reuse/composting  16.25% 2013-17

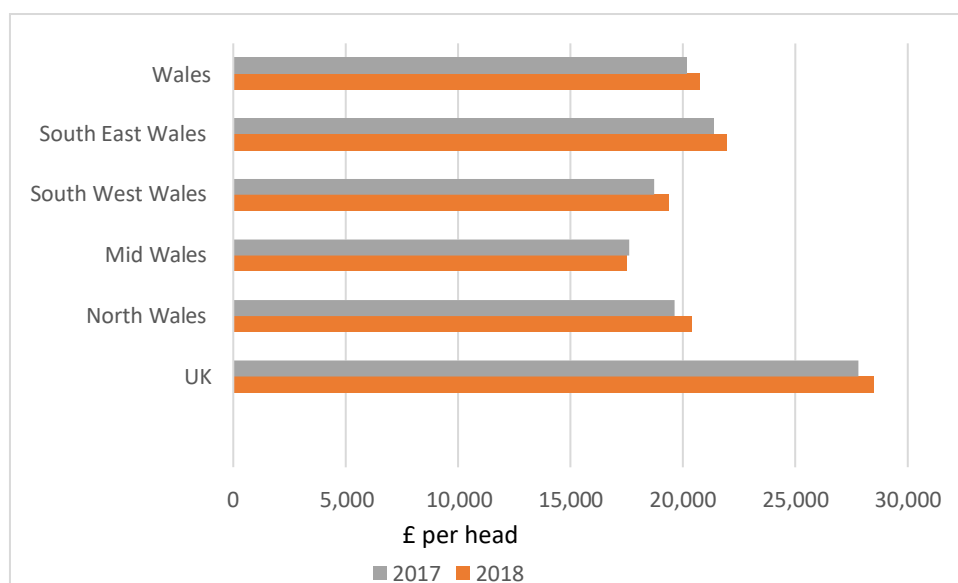
Source: Labour Force Survey, ONS [accessed April 2020]

Gross value added

Gross value added (GVA) per head in Wales was 73.1% of the UK average in 2015 and increased by 0.5% during the year (Welsh Government, 2020b). Even though Wales is growing at a slower rate in terms of GVA per hour worked when compared to the UK as a whole, GVA for South East Wales grew at a slightly faster rate (3.1%) in 2015, when compared to Wales as a whole (3%) (Welsh Government, 2020b).

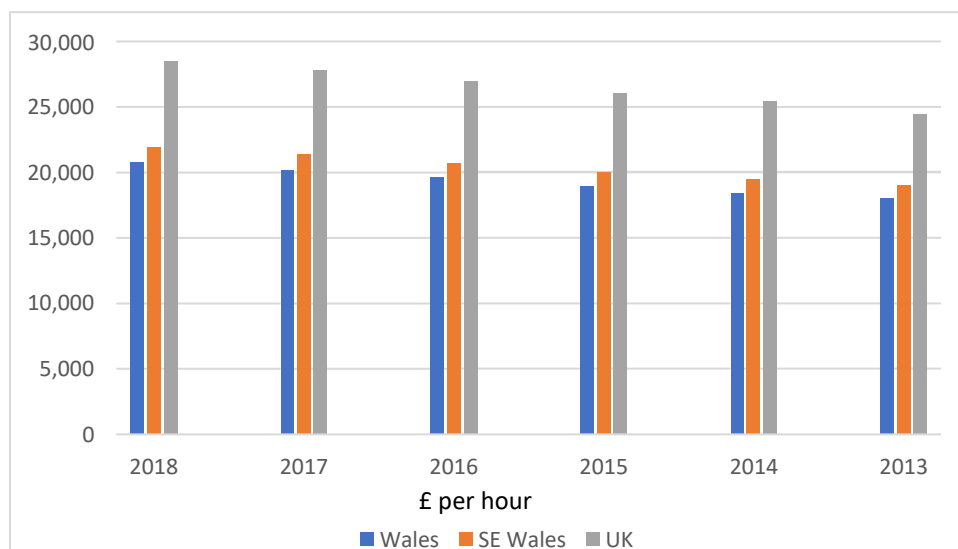
Figures 5 and 6 show the data on gross value added (GVA) for each of the Welsh regions and the UK: as GVA per head in 2017 and 2018 (Figure 5), and as GVA per hour worked for Wales, South East Wales and the UK for the period 2013–18 (Figure 6). Figure 7 shows GVA per head by local authority area for the period 2011–18.

Figure 5: Gross value added per head in 2017 and 2018 for the Welsh regions and the UK



Source: Regional Accounts, Office for National Statistics [accessed April 2020]

Figure 6: Gross value added per hour worked from 2013–18 in Wales, South East Wales and the UK



Source: Regional Accounts, Office for National Statistics [accessed April 2020]

Figure 7: Gross value added (£ per head) by local authority area (2011–18)



Source: Welsh Government, Annual Population Survey [accessed April 2020]

1. Innovation

Research and innovation drive economic growth and productivity. Here, overall statistics are provided, followed by a more detailed discussion of the importance of investment in higher education for research and innovation; and investments to strengthen research and innovation in collaborative partnerships, particularly those focused on digital innovation and advanced engineering.

In 2018-19 investment in research and innovation available to Welsh Universities and the National Museum of Wales was approximately £79.5m (NAWC, 2019).

Innovation activity has been found to be higher in East Wales than in West Wales, especially regarding product and service innovation (this is despite its overall rank being much lower than England (PPIW, 2016). The investment focus has been on business and entrepreneurship innovation such as incubating new companies, as well as supporting existing firms and SMEs.

The CCR's Industrial and Economic Growth Plan outlines priority areas in innovation, infrastructure and challenge that aim to improve the business environment in the region. The innovation investments will target areas with growth potential and competitive strength, with the possibility of leveraging significant return on investment in the future.

In addition to ongoing research, innovation and enhancements to the digital network, there have been a number of initiatives encouraging the design and creation of new products and services driven by high-tech industries. Investing in compound semi-conductors alongside investment in artificial intelligence, fintech and cybersecurity will contribute to building a more resilient future economy. This is dependent on building partnerships and collaboration among universities, research and development firms, start-ups and science parks.

To develop capabilities in compound semiconductor applications an investment of £50m has been made by the UK government to establish a new catapult centre in Wales.

Investment in higher education

Investment for development in research and innovation in higher education is key to ensuring both innovation for industry and a skilled labour force. The Economic Action Plan (EAP) aims to ensure that there is a steady supply of appropriately skilled and qualified people across the economy and that employers take responsibility for upskilling their workforce.

A BEIS report (2015: 26) noted that Wales has an 'extensive research and development base in renewable energy and smart energy solutions, e.g. SPECIFIC (an EPSRC Innovation and Knowledge Centre), the Low Carbon Research Institute, and Cardiff University's £24m FLEXIS project which involves worldwide collaborations'.

The Higher Education Funding Council for Wales (HEFCW) has made ambitious plans to develop a research base to boost science and innovation by partnering with universities in the region i to contribute to the goals of the EAP. (See Figure 8).

Figure 8: Research and innovation vision of the Higher Education Funding Council for Wales



Source: Research and Innovation, (HEFCW, 2019)

The South East Regional Economic Framework (2015) outlines the areas of academic expertise and research excellence in the region that have the most potential to boost the local economy and promote economic development. Key among these are:

- Cardiff University's Neuroscience and Mental Health Research Institute;
- Cardiff University Data Science Research Academy and the National Software Academy;
- Cardiff University School of Engineering; and
- University of South Wales Cybersecurity Academy.

A report from the National Assembly for Wales Commission (NAWC) showed that that funding for public sector research and innovation in Wales is well below that for England and Scotland, Table 4 (NAWC, 2019). The Diamond Review, which looked into higher education funding in Wales, noted that as an essential funding source for research and innovation, higher education funding for Wales should be at least £71m per annum (Diamond Review, 2016; NAWC, 2019). In order to address these imbalances and the consequences of different levels of investment, institutions such as UK Research and Innovation (UKRI) will need to make funding adjustments (Forth and Jones, 2020).

Table 4: Higher education funding in the UK by funding council, 2018/19

Funding Council	Quality-related research (QR) funding	Innovation and engagement funding
Research England	£1600m	£210m
Scottish Funding Council	£242m	£19m
Higher Education Funding Council for Wales	£71m	£0m
Foundational Economy Challenge Fund	--	£4.5m (experimental funding)

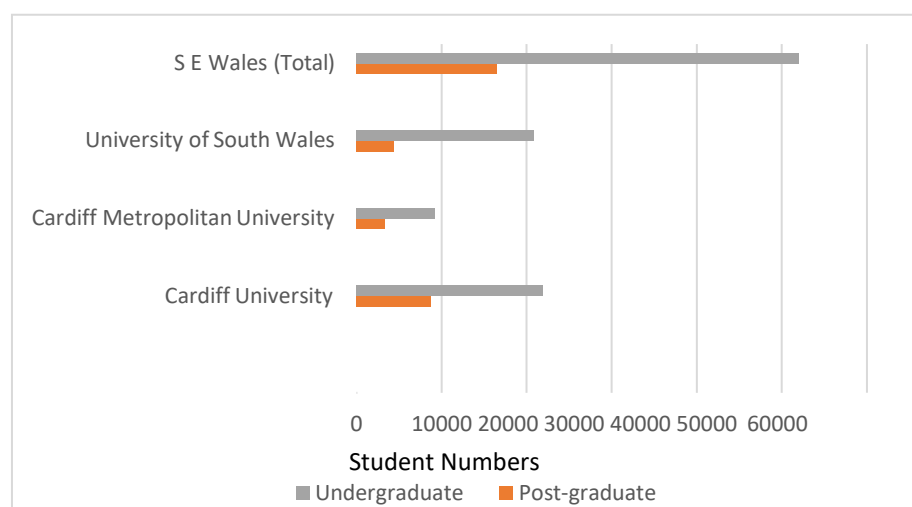
Source: HEFCW (2019)

The allocated funding for HEFCW from the Welsh Government for 2019-20 is £148.9m. This was less than the £160.5m in 2018-19, but an increase from the £126.6m in 2017-18. In 2019-20 the Welsh Government provided additional funding which enabled HEFCW to support the following areas (HEFCW, 2019):

- £3.5m to new university-led activities for projects that enhance collaboration between higher education and further education in innovation and engagement activities;
- £1.8m to support university strategies for enhancing civic mission and community engagement, which included £200k for a physics mentoring project;
- £10m for estates' capital developments;
- A further £80m capital investment was made in next generation microelectronic assets at the Institute of Compound Semiconductor at Cardiff University (BEIS, 2015); and
- £1.2m for the Institute of Coding.

Figure 9 shows the levels of total enrolment in the higher education sector in South East Wales, and in the three universities in the region: University of South Wales, Cardiff Metropolitan University and Cardiff University.

Figure 9: Number of students enrolled in higher education institutions in South East Wales (2015–16)



Source: Welsh Government (2020a)

Support for high-value innovative businesses

The CCR has prioritised investments in research and development and the provision of support for high-value innovative businesses. Plans have also been included within the CCR City Deal for flexible and better use of data, which is regarded as essential for driving innovation across the public sector and the wider economy.

The Science and Innovation Audit for South West England and South East Wales is a joint collaborative partnership to harness the research strength and innovative industrial capacity to create and sustain a knowledge economy and lead in digital innovation and advanced engineering. The focus is on strengthening the following areas (BEIS, 2015):

- Aerospace;
- High value engineering;
- Microelectronics;
- New energy systems;
- Digital industries; and
- Environmental technologies.

Table 5 shows the number of new patents acquired by the three universities in the South East of Wales in the year 2018-19, according to the Higher Education Statistical Agency. The number of patents reflects the performance of the region in innovation and research and the potential impact on economic growth and productivity.

Table 5: Intellectual property: disclosures and patents filed by or on behalf of the higher education (HE) provider

University	Number of disclosures	Number of new patents applications filed in year	Number of patents granted in year	Cumulative patent portfolio	Number of patents filed by an external party naming the HE provider as the inventor
Cardiff University	81	50	37	335	83
Cardiff Metropolitan University	3	5	1	3	4
University of South Wales	1	1	1	31	0

Source: Higher Education Statistics Agency, 2018/19

2. Business

This section focuses on start-ups, patterns of employment in key economic sectors, and skills development.

Start-ups

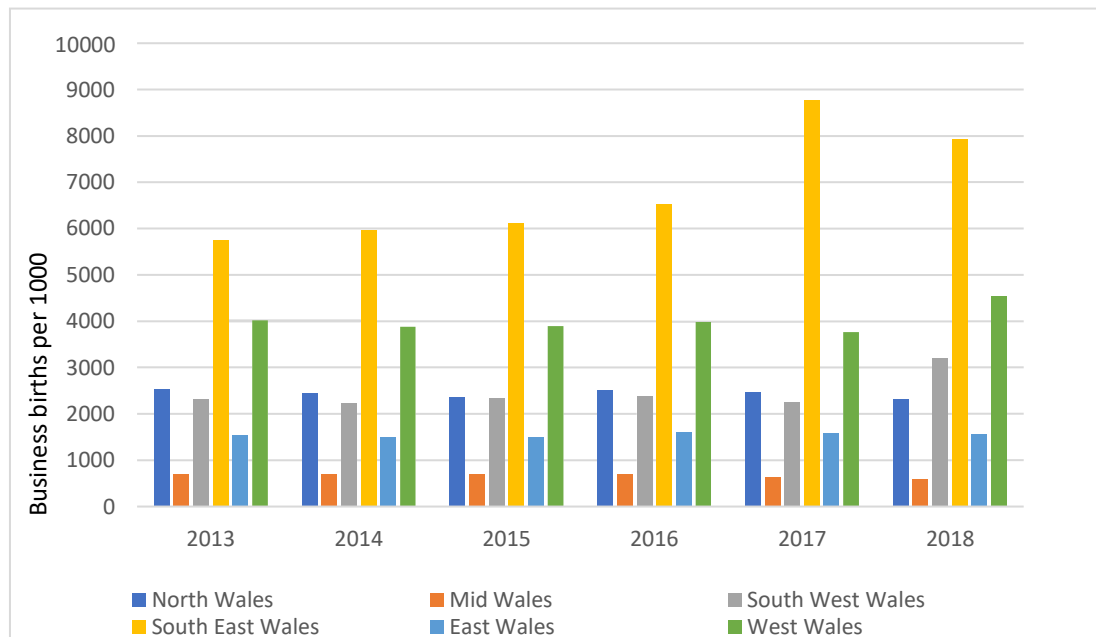
Most of the start-ups in Wales are located in South East Wales: 42% of micro-sized enterprises, 44% of small 44% and 57% of medium-sized start-ups are located there (Kapitsinis et al, 2019). South East Wales also has the highest density of medium sized firms with approximately 8 firms per 10,000 inhabitants (Kapitsinis et al, 2019). The main sectors for start-ups are transport and storage (21%), wholesale or retail (19%), administrative and support services (15%) and construction (14.5%) (Kapitsinis et al, 2019).

The Employability Delivery Plan for Wales (2018) has included youth entrepreneurship as part of the Business Wales Service. This is to ensure that there is a wide network of entrepreneur role models in Wales across all sectors including schools, colleges, universities, and in the community setting to inspire

young people to develop ideas for business and to encourage start-ups (Welsh Government, 2018d). Such aspirations have been found to be particularly high among young adults and those with entrepreneurial skills. The Big Idea Wales programme will offer bespoke support through workshops and boot camps to develop the skills of young entrepreneurs to make informed decisions (Welsh Government, 2018d).

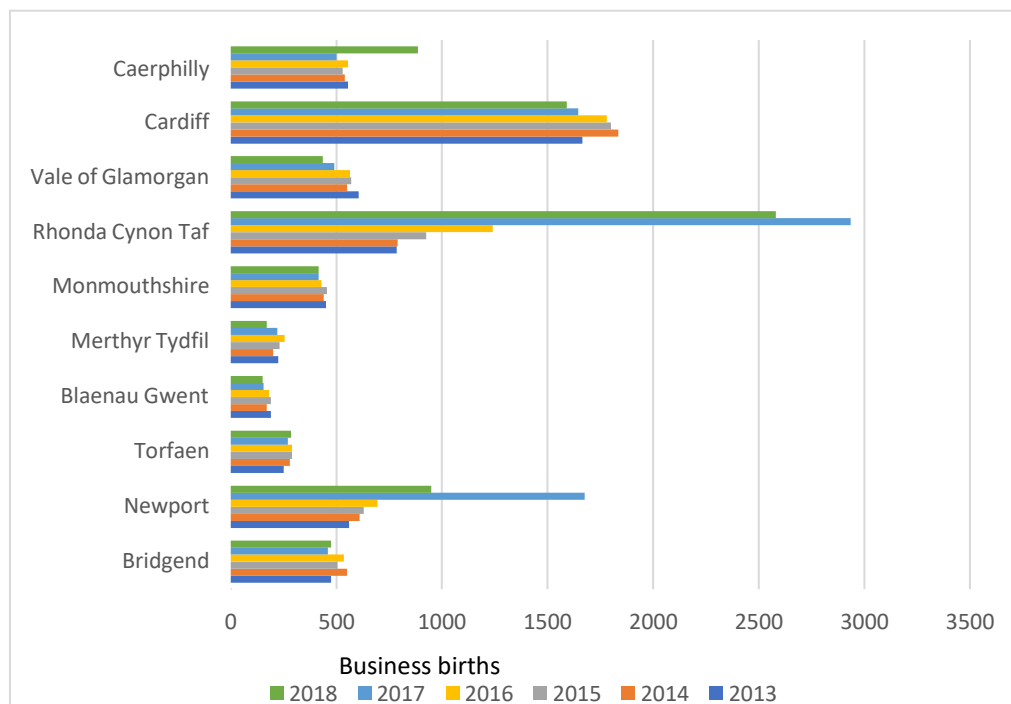
Figures 10 to 13 show business births and deaths for the period 2013–2018. Figures 10 and 11 show business births in the Welsh regions and within the local authorities of South East Wales, Figures 12 and 13 show business deaths in the Welsh regions and within the local authorities of South East Wales.

Figure 10: Business births in the Welsh region for the period 2013–2018



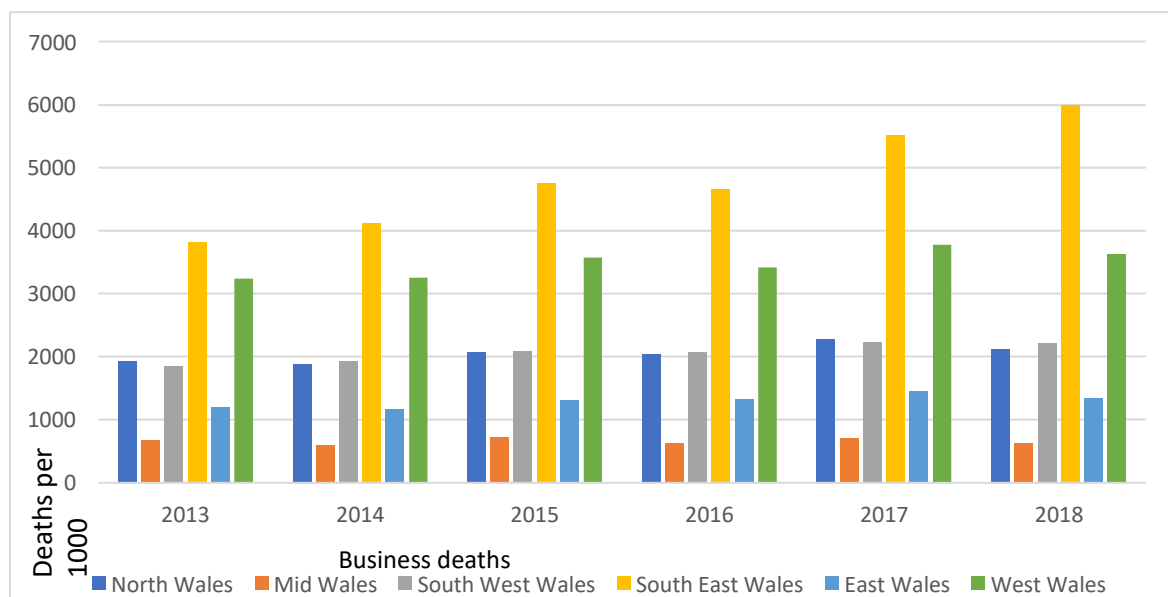
Source: Business Demography, ONS [accessed April,2020]

Figure 11: Business births in the 10 local authorities of South East Wales for the period 2013–2018



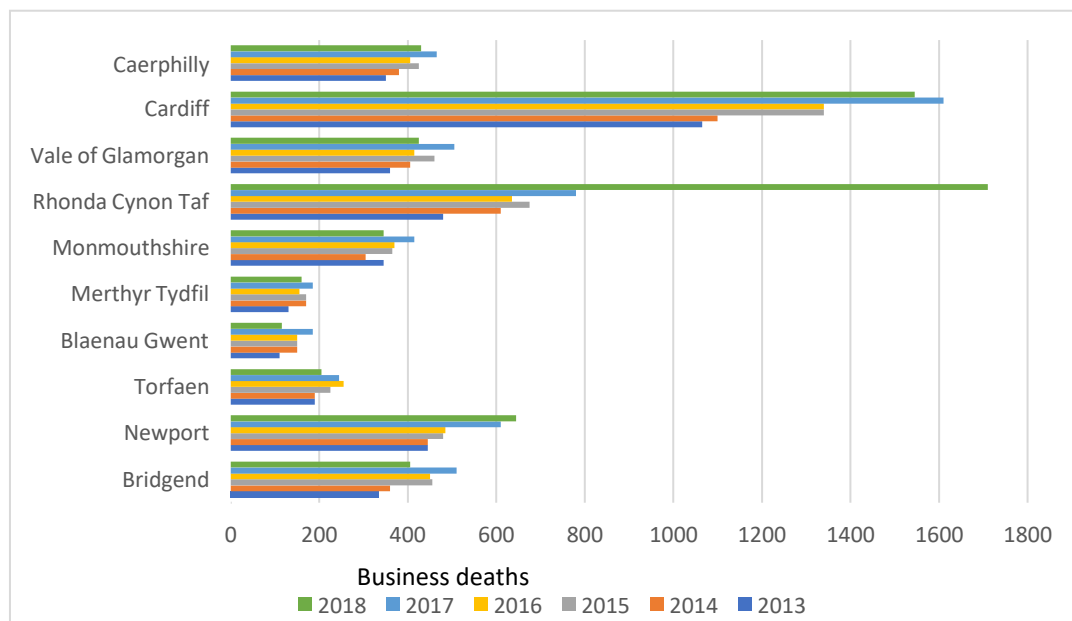
Source: Business Demography, ONS [accessed April,2020]

Figure 12: Business deaths in the Welsh region for the period 2013–2018



Source: Business Demography, ONS [accessed April,2020]

Figure 13: Business deaths in the 10 local authorities of South East Wales for the period 2013–2018



Source: Business Demography, ONS [accessed April 2020]

Patterns of employment in key sectors

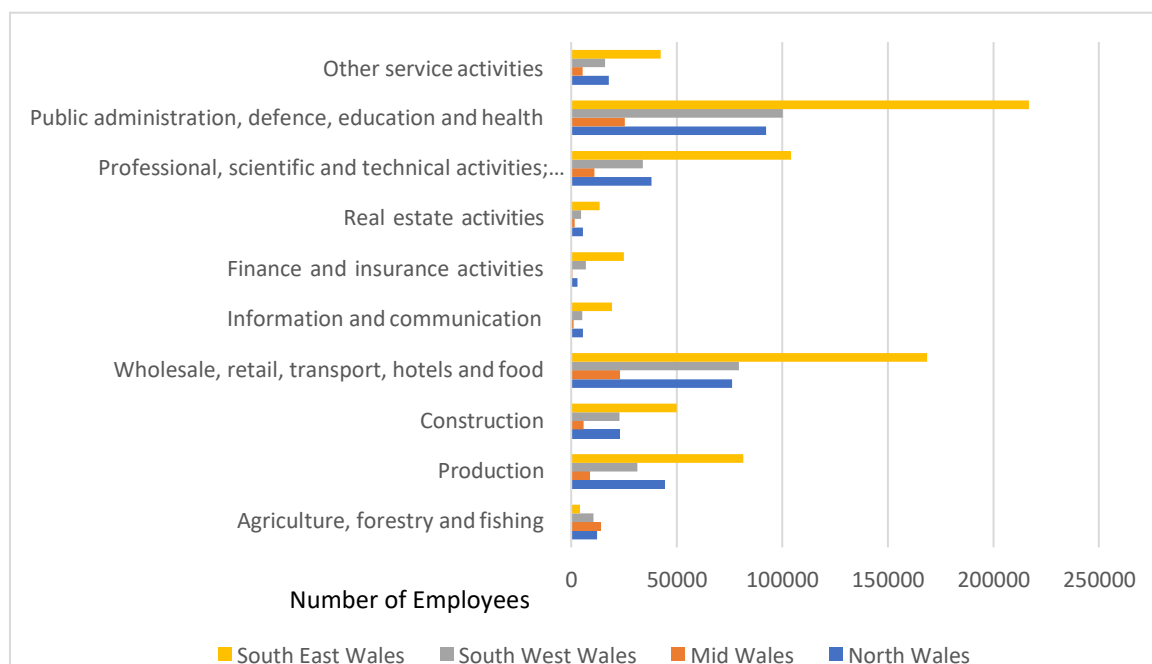
Data for levels of employment by sector are provided in Table 6 and Figure 14.

Table 6: Number of employees by South East Wales local authority and broad industry in 2018

	Agriculture, forestry and fishing	Production	Construction	Wholesale, retail, transport, hotels and food	Information and communication	Finance and insurance activities	Real estate activities	Professional, scientific and technical activities; administrative and support service activities	Public administration, defence, education and health	Other service activities
Bridgend	100	9100	4700	14000	1800	600	800	7900	18300	3400
Newport	200	8400	5200	20600	2100	3500	1200	13300	21600	3600
Torfaen	200	6800	2600	8200	600	600	1100	3600	13000	1900
Blaenau Gwent	100	4200	1000	5000	100	300	400	1800	6200	1200
Merthyr Tydfil	100	3500	2000	6900	1400	200	600	2700	9500	1100
Monmouthshire	1900	5000	5100	13800	1000	1000	1300	6900	14400	2900
Rhonda Cynon Taf	300	11500	7100	21600	1000	900	1100	6700	24000	3300
Vale of Glamorgan	500	4100	3400	10200	1100	1200	1000	5000	12900	3500
Cardiff	600	16400	14700	56800	9700	16000	5100	48100	80700	18700
Caerphilly	200	12600	4000	11600	600	700	800	8200	16100	2800

Source: Annual Population Survey, ONS (2018)

Figure 14: Workplace employment by Welsh region and broad industry in 2018



Source: Annual Population Survey, ONS (2018)

Skills development

Skills development and employment plans in Wales have been based on the CCR Regional Skills Partnership, which involves partnerships and collaboration with educational institutions, industry and the Welsh Government (CCR, 2019a). The CCR outlines the following priorities to address skills development and to address the problem of unemployment (CCR, 2019a):

- Creating opportunities to bring back the workforce who have been unemployed for a long time;
- Creating new jobs for the unemployed and increasing and adapting the number of apprenticeships or other skills programmes; and
- Training people in relevant skills to enable them to compete globally.

The CCR has also relaunched the CCR skills and employment board, which comprises a wide range of stakeholders including business entities, higher and further education institutions, local authorities and the Welsh Government. In 2017 the CCR and the Welsh Government pledged to work with the Department of Work and Pensions to co-design future employment support in Wales for people with disabilities and health conditions, or those who have been unemployed for a long time (National Assembly for Wales Commission, 2017).

3. Infrastructure

The priority areas of infrastructure investment include schools and health infrastructure, transport, housing and telecommunications.

The CCR's Investment Framework sets out the three investment priorities as innovation, infrastructure and challenge. These are aligned with the CCR's targets of connectivity, competitiveness and resilience. The investment priorities of the CCR's aim to stimulate economic growth in the region through upskilling, and enhanced digital technology for improved connectivity, and better transport facilities to provide more economic opportunities to the people living in the region and surrounding areas, and to connect business, communities, jobs and services and facilities (CCR, 2016; Cardiff Capital Region, 2019a; Welsh Government, 2019).

A major infrastructure project of the CCR is the South Wales Metro. This aims to improve connectivity within the region alongside the development of Cardiff airport, digital connectivity, and road and rail links (Welsh Government, 2015).

EU structural funds also contributed to infrastructure development in Wales. A total of £721m spent or already committed to infrastructure projects since 2012, with £366m of EU funds spent or committed on infrastructure development since 2014 boosting a total investment of £740m for the period 2014–20 (Welsh Government, 2018b). Areas where investments have been focused include: telecommunication and transport links between east and west, the energy sector, affordable housing, public services, schools, and enterprise zones (Welsh Government, 2018).

The following are initiatives in Wales that include funding from EU structural funds in 2018 (Welsh Government, 2018b) include:

- £734m in the South Wales Metro;
- £221m in enterprise zones;
- £185m in broadband providing superfast access to internet services in 691,000 premises;
- £124m in vibrant and viable places programme for flagship regeneration;
- £320m regeneration programme, which led to a delivery of 1,851 jobs; supported 7,768 people into work and built 914 affordable and 961 market homes;
- £20m invested in 32 towns for Town Centre Loan Plan, which will attract a further £60m investment over the next 15 years; and
- £263m to reduce the cost of flood and coastal erosion.

Other infrastructure projects include:

- £8.2m for Cardiff's Food and Organic Waste infrastructure programme from the Welsh Government's Waste Infrastructure programme;
- £104m to create 25,000 warm and energy efficient homes. for the period 2014–2017 from the Welsh Government's Warm Homes Programme. This has the scope to provide business employment for SMEs and large contractors in providing domestic installation services); and
- A five-year plan has been by the National Transport Finance Plan for the development of road, rail, bus and active travel improvements and includes £20m for the development of an advanced manufacturing research institute and another £62m for a new broadband scheme to develop and improve a Superfast Cymru project (Welsh Government, 2018).

Broadband technology

Ofcom's annual report (2019) states that 165,000 homes in Wales (12%) have access to full-fibre broadband connections, which is over 90,000 more than the previous year. However, the number of homes with access to superfast (at least 30 Mbit/s) broadband in Wales is currently at 93%, with ultrafast speeds (at least 300 Mbit/s) available to 31% of homes in Wales — a three percentage point increase from the previous year. The 10 local authorities in South East Wales are likely to have superfast broadband coverage and better broadband services than rural areas, as most businesses are concentrated in these areas (Table 7).

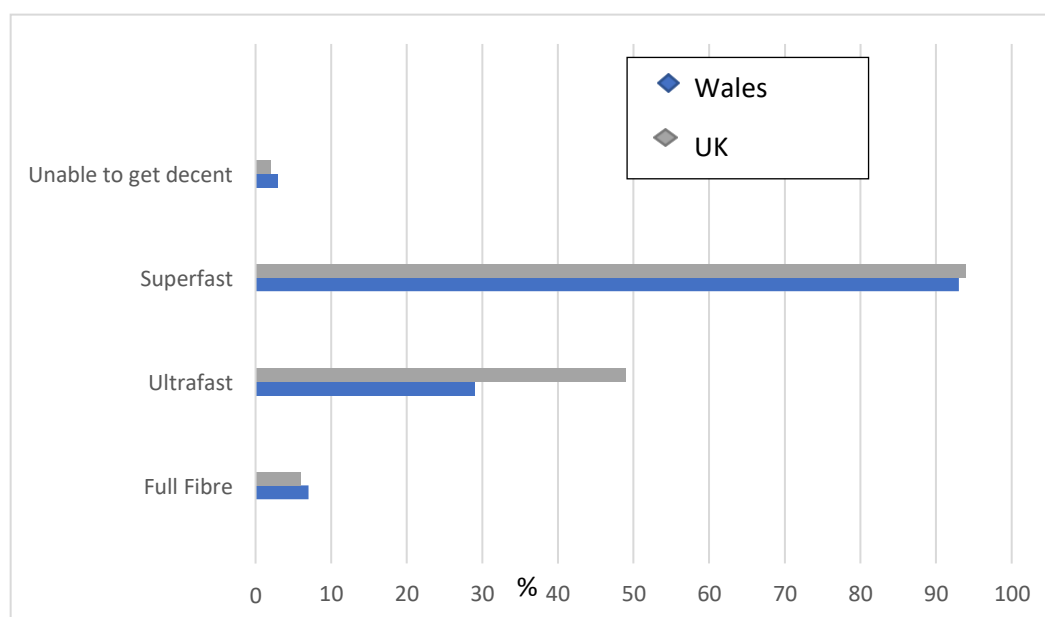
Table 7: State of broadband services by local authority in South East Wales in 2019

Local Authority	Current superfast coverage %
Caerphilly	97.9
Bridgend	98
Newport	97.4
Torfaen	97.1
Blaenau Gwent	98.1
Merthyr Tydfil	98
Monmouthshire	87.1
Rhonda Cynon Taf	98.5
Vale of Glamorgan	96.6
Cardiff	98.7

Source: ISP News (2019)

As Figure 15 shows, the gap in the provision of broadband between Wales and the rest of the UK is greatest for ultrafast broadband.

Figure 15: State of broadband services in UK and Wales in 2019



Source: Ofcom (2019)

A key component of the development envisaged in the CCR Industrial and Economic Growth Plan (2019) is an innovative, superfast digital infrastructure system which involves moving to the next generation of broadband and developing the region as one of the fastest-growing tech hubs in the UK.

This involves:

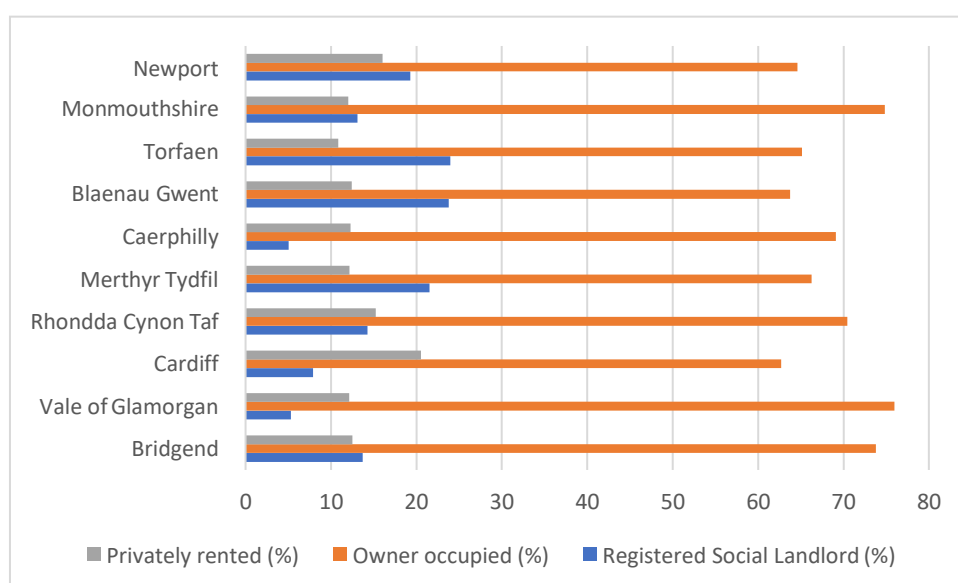
- Exploring the case for direct international connectivity;
- Developing mobile infrastructure across 4G and 5G technologies;
- Increasing wi-fi services across public transport; and
- Digital solutions for big problems, such as smart housing, citizen payments and open-data challenges.

In addition to this, the investment focus of the Science and Innovation Audit is on creating microelectronics, wireless, data analytics, autonomous systems, vision and remote sensing technology, satellite applications, cloud computing, quantum engineering, cyber security and virtual reality (BEIS,2016). Business cases are currently being developed to create a digital innovation hub through collaboration with universities and industries that have the potential to develop smart cities, digital media, robotics autonomous systems and digital health.

Housing

Housing is a fundamental component of infrastructure that supports economic growth and social well-being. In line with this priority, a housing investment fund has been set up by the City Deal to support housing growth and development in the region. Figure 16 shows the dwelling stock estimates in South East Wales by local authority in the region.

Figure 16: Dwelling stock estimates by local authority and tenure for South East Wales



Source: Welsh Government (2019c)

4. People

This section looks at the people in the region in relation to population size, and employment statistics such as working age, education levels, levels of employment and unemployment, and priority areas for skills development.

The population of South East Wales was recorded as 1,532,828 in 2018 — about 48.8% of the Welsh population. The city of Cardiff is more developed than surrounding areas, and accounts for 24% of the region's population. Rhondda Cynon Taff (240,131) and Caerphilly (181,019) are the next two populous cities, while Merthyr Tydfil and Blaenau Gwent have the smallest populations (Welsh Government, 2019f).

The working-age population in South East Wales increased by 2% between 2008 and 2018 compared to the rest of Wales (-0.2%). At the local authority level, both Cardiff (5.3%) and Newport (7.9%) recorded an increase in the working age population compared to the other local authorities in the region (Welsh Government, 2019f).

Table 8: Employment in South East Wales, Wales and the UK

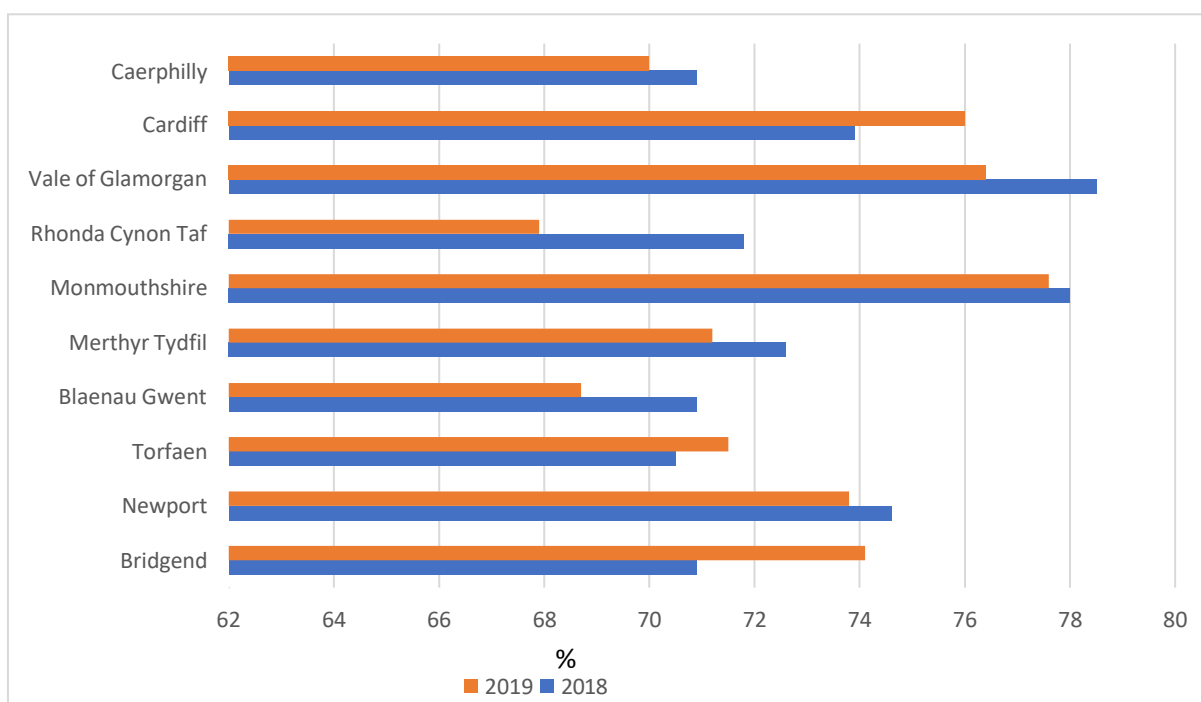
Rate of employment %	South East Wales	Wales	UK
2019	73.4	73.5	75.6
2018	73.2	73.1	75.0
2017	71.8	72.4	74.7
2016	70.0	71.1	73.7
2015	69.5	70.3	73.2

Source: Annual Population Survey, ONS [accessed May 2020]

Table 9: Unemployment in South East Wales, Wales and the UK

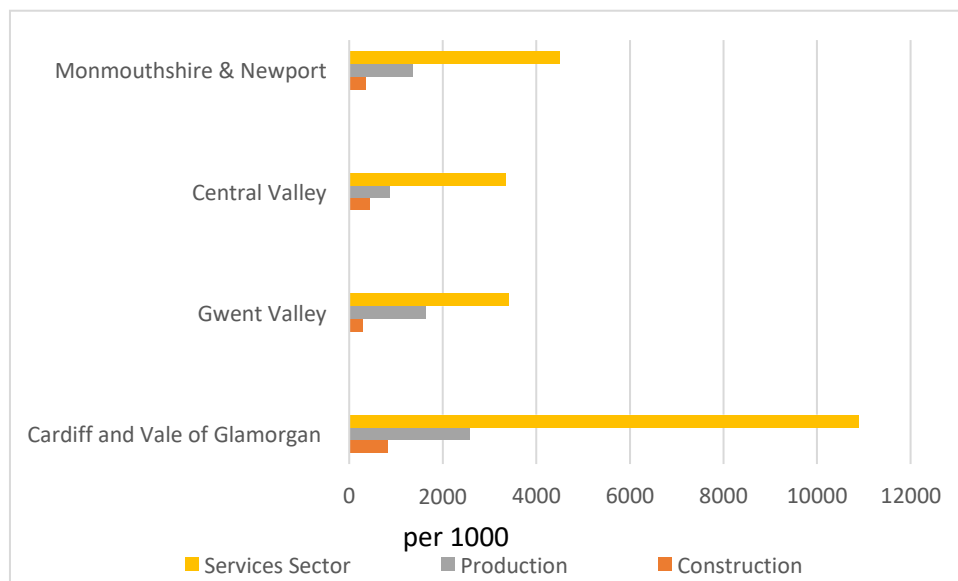
Rate of Unemployment %	South East Wales	Wales	UK
2019	4.1	4.3	3.9
2018	5.1	4.6	4.2
2017	5.6	4.8	4.5
2016	5.1	4.7	5.0
2015	6.9	6.2	5.4

Source: Annual Population Survey, ONS [accessed April 2020]

Figure 17: Employment rate in South East Wales by local authority, 2018 and 2019

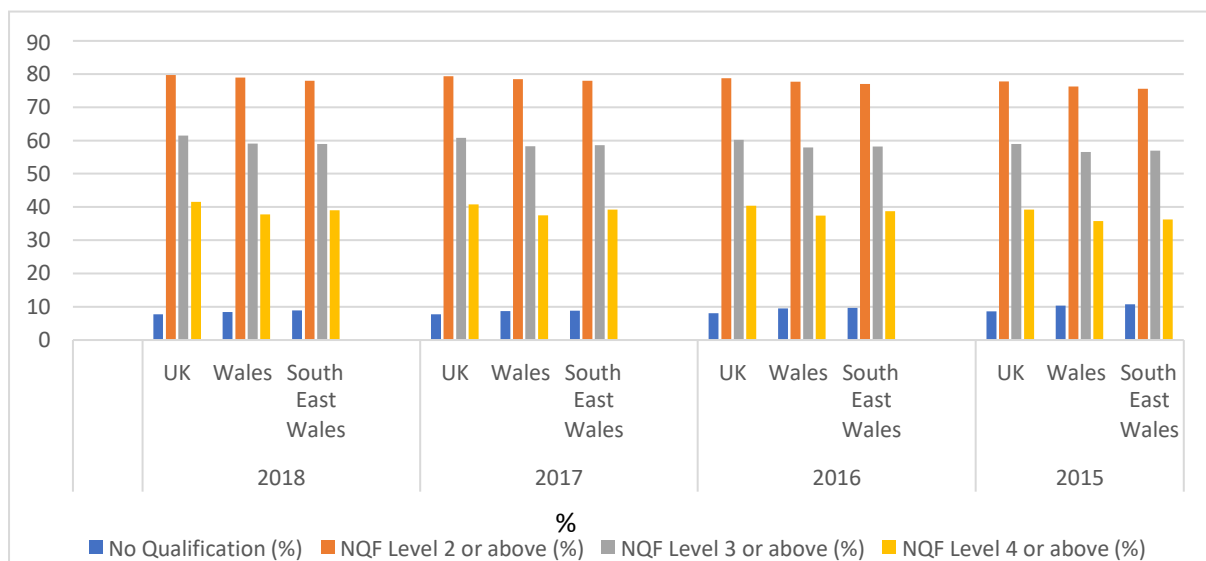
Source: Annual Population Survey, Office for National Statistics [accessed April 2020]

Figure 18: Employment by industry and local authority in South East Wales, 2018



Source: Regional Accounts, ONS [accessed April 2020]

Figure 19: Educational qualifications by region, 2015 and 2018



Source: Higher Education Statistics Agency 2018/19

Labour market analysis undertaken by the Regional Skills Partnership identified the following sectors as critical for skills development in the region (CCRSP, 2019a). These include:

- Advanced materials and manufacturing;
- Automation;
- Construction;
- Financial, legal and professional services;
- Human foundational economy including education, health and social care;
- Digital; and
- Aerospace.

5. Place

This section discusses specific dimensions of place and location as they relate to areas of deprivation, anchor institutions and tourism.

Index of multiple deprivation

Although South East Wales has two major urban areas and generates a large share of economic activity in Wales, it is also home to a high number of deprived areas. In fact, South East Wales contains eight of the ten most deprived areas in Wales: Caerphilly (St James and Twyn Carno), Cardiff (Splott), Rhondda Cynon Taff (Tylorstown and Pen-y-waun), Bridgend (Caerau), Merthyr Tydfil (Merthyr Vale) and Newport (Pillgwenilly) (Table 10).

South East Wales has 49% of the Lower Super Output Areas with 66% in the most deprived area in the region (regional index of multiple deprivation, 2014) as indicated in Table 10.

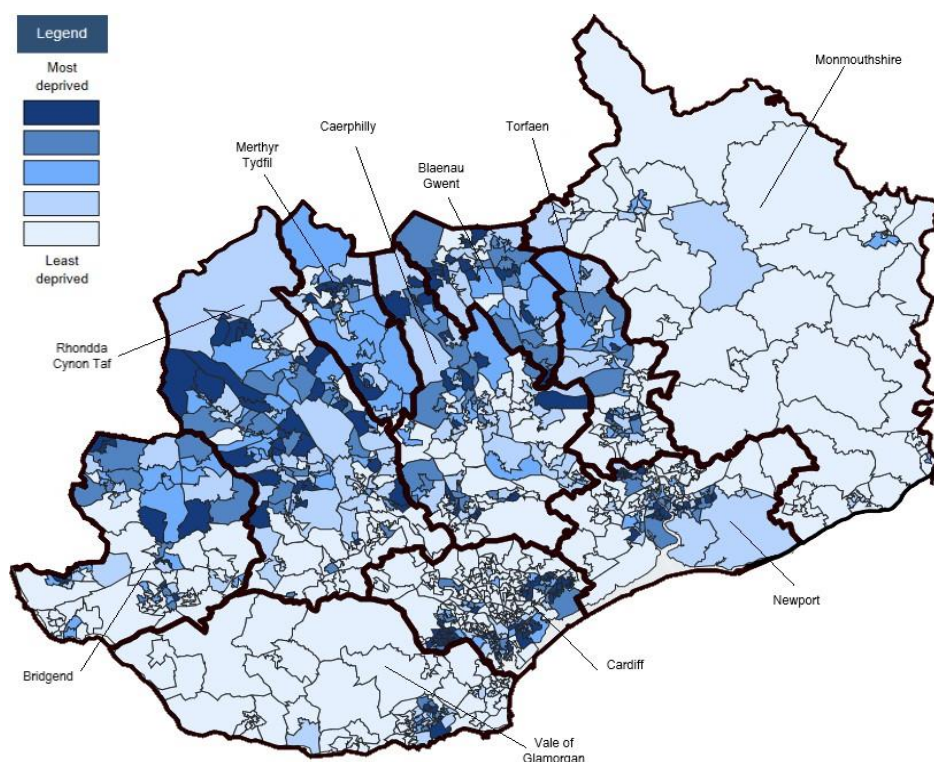
Table 10: Welsh index of multiple deprivation, 2014

Economic region	% of total number of LSOAs*	% of most deprived 10% of LSOAs	% of most deprived 20% of LSOAs	% of most deprived 30% of LSOAs	% of most deprived 50% of LSOAs
North Wales	22%	12%	13%	14%	18%
Mid and SW Wales	29%	21%	23%	22%	26%
South East Wales	49%	66%	64%	64%	56%
Wales	100%	100%	100%	100%	100%

Source: Welsh Government (2015b)

*The Lower Super Output Area (LSOA) reports small-area statistics in England and Wales (NHS Digital, 2020)

Figure 20: Areas of multiple deprivation



Source: Welsh Government (2015b)

Anchor institutions

Anchor institutions are organisations that are rooted in and significant to the local economy. These include hospitals; community organisations; higher education institutions; other academic institutions; cultural institutions such as museums, libraries and performing arts facilities; and a diverse body of businesses, enterprises and commercial bodies. Partnerships between anchor institutions, universities and other organisations can boost innovation and technology, which in turn is beneficial for economic growth generally (Morgan et al, 2017).

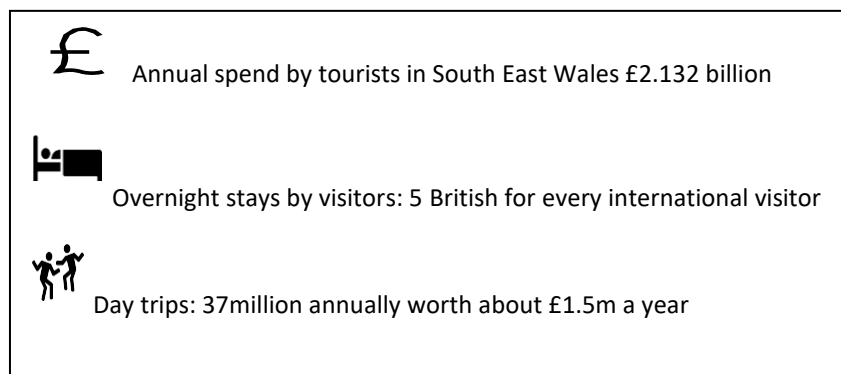
Studies have shown that anchor institutions are unevenly distributed across Wales, which makes it difficult for collaboration and partnerships to grow and develop in the region (Smallbone et al, 2015; Williams, 2017).

The CCR consists of three enterprise zones (Central Cardiff, Cardiff Airport and St. Athan and Ebbw Vale). Large company headquarters based in these zones are the Admiral Insurance Group (global headquarters), Deloitte (global risk assessment centre), Atradius (UK headquarters), BBC (the finance centre of excellence).

Tourism

South East Wales is an extremely popular tourist destination because of its iconic historical sites such as the Big Pit, Caerphilly Castle, Castell Coch and St. Fagans, and its areas of natural beauty. Tourism contributes to the local economy through expenditure and job creation (South East Wales Regional Economic Framework, 2015).

Table 11: Tourism in South East Wales in 2014–16



Source: Welsh Government, 2018d

6. Environment

The Regional Economic Growth Plan for the CCR outlined key priorities to support businesses in a sustainable way. These are decarbonisation, innovation, entrepreneurship, exports and trade, high quality employment and skills development, research and development, automation and digitisation. The National Development Framework outlines the requirement of the Welsh Government to identify green belts through a strategic development plan to manage urban growth — in this case in South East Wales (NDF, 2019).

The Well-being of Future Generations Act (2015) made it obligatory for public bodies to meet well-being goals with sustainable development objectives. This includes a requirement to maintain a biodiverse and healthy ecosystem that can develop and support a socially, economically and ecologically resilient Wales. This requires strong partnerships among the local authorities and various stakeholders to promote local food production, safeguard and create employment opportunities including green jobs, assist in developing climate adaptation programmes to cope with climate stress such as floods, and build coastal resilience. This will be done through the maximisation of green infrastructure in managing water and temperature regulation, and the provision of high-quality green space for health and well-being. It also involves attracting inward investment in a sustainable way by ensuring that biodiversity, resilience and eco-connectivity continue to thrive and develop across the South East Wales region (Welsh Government, 2015b).

The Environment (Wales) Act (2016) made it mandatory to achieve the net emissions target of 80% reduction by 2050, through the interim targets for 2020, 2030 and 2040; and the five-yearly carbon budget, which sets out limits on the amount of emissions permitted in Wales.

The Welsh Government's Natural Resources Policy (2017) sets out the national priorities for the sustainable management of natural resources. This includes delivering nature-based solutions, increasing resource efficiency and renewable energy and tailoring approaches to local needs. The policy stipulated the importance of actions to address air and noise pollution and to improve the ability of the natural environment to absorb pollutants through their greening programme, which includes building green infrastructure, planting trees and restoring sensitive habitats that have been damaged by air pollution.

The South East Wales Networked Environment Region, developed under the framework of the Wales Spatial Plan and in partnership with the Countryside Council for Wales, has committed to addressing these objectives and promoting sustainable development.

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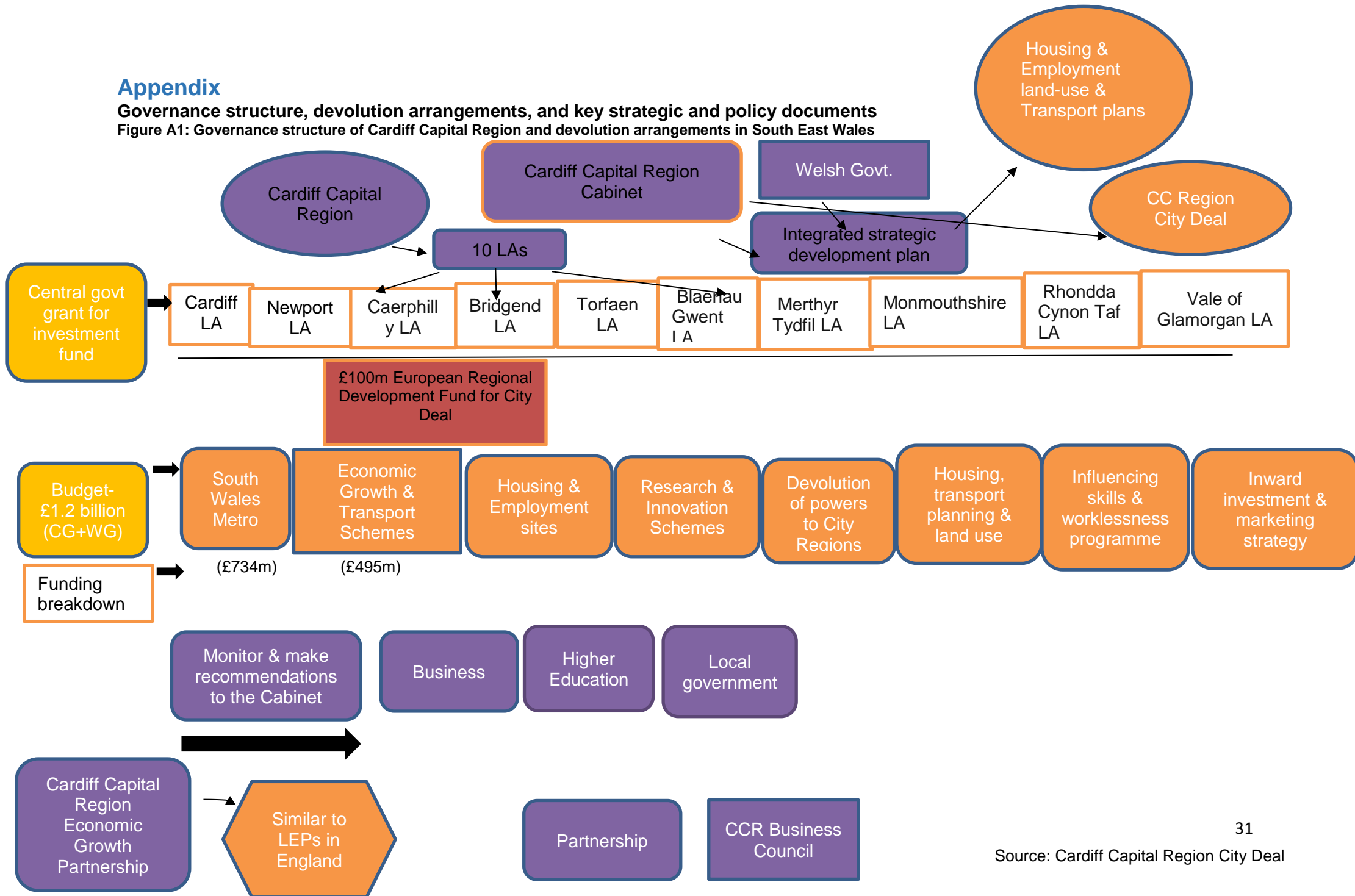
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Appendix

Governance structure, devolution arrangements, and key strategic and policy documents

Figure A1: Governance structure of Cardiff Capital Region and devolution arrangements in South East Wales



History and timeline of the devolution process

This section lists the local government institutions that have devolved during the last 30-40 years following the Local Government Act in 1972. In terms of the Act, a two-tier Welsh system was created, comprising eight county councils and 37 district councils. Table A1 outlines the devolution process and accompanying legislation, and Figure 5 presents a timeline of regional institutions in South East Wales over the past 30 years.

Table A1: The devolution of regional institutions over the last 40 years

Year	Devolution	Institutional Changes
1974	Local Government Act 1972	2 tier structure-8 CCs &37 DCs
1996	Local Government Wales Act 1994	Single county of 22 LAs
1998	Government of Wales Act	Formalised relationship
1999	Local Govt Act	Best Value regime established
2003	The Second Assembly	Role, Function & Future Potential of Community & Town Councils in Wales
2007	The Third Assembly	South-East Wales Shared Services Project agreed by 10 LAs
2011	The Fourth Assembly	The Simpson Compact-collaboration between local govt. (only 6 specific regions)
2016	The Fifth Assembly	Devolution of powers from Cardiff Bay
2017	Local Council Election held	Adding 10 new LCs to the 22 Councils
2018	Strengthening local govt	

Areas where devolved powers can be exercised in Wales

The Government of Wales Act 1998 led to the creation of a devolved government in Wales with a 50.3% voting for a devolved National Assembly for Wales. The Government of Wales Act 2006 enabled the Assembly to pass primary legislation on devolved matters.

- As Schedule 7 of the Government of Wales Act 2006 allowed the National Assembly to legislate on devolved matters, the Welsh Government can officially exercise executive powers in 21 subject areas. These include agriculture, forestry, fishery, health and health services, economic development, environment, housing, social justice, tourism, devolved but limited taxation powers. Responsibility for fiscal and macroeconomic policy and public expenditure allocation across the UK lies with the HM Treasury.
- Devolved primary legislation takes the form of acts of the National Assembly and have the same status in law as acts of Parliament, and they only have effect in Wales. Secondary legislation

(orders, regulations and so on) is usually made by Welsh Ministers and approved by the Assembly.

- Current devolution plans within the UK allow for the development of national level plans within the devolved nations. With the establishment of the Local Government Act in 1972, it has given more scope to the national and regional policy making in Wales by local authorities. This not only led to the establishment of counties which have the power to pass legislations but also provide other services such as delivering strategies and targets, set and monitored by the Welsh Government.
- UK legislation that applies to Wales may give the Welsh Ministers powers to make secondary legislation in order to implement it in Wales (Welsh Government,2016). For example, until the National Assembly passed the Housing (Wales) Act 2014, the framework for statutory homelessness services in Wales was found in the UK's Housing Act 1996. This piece of legislation gave priority to those in need of assistance and ran the risk of becoming homeless. This is illustrative of how a devolved government in Wales can pass legislation through devolved institutions such as law- making, funding and taxation to address issues that are critical to Wales and needs to be prioritised as a matter of urgency.

Figure A2: Timeline of the devolution process

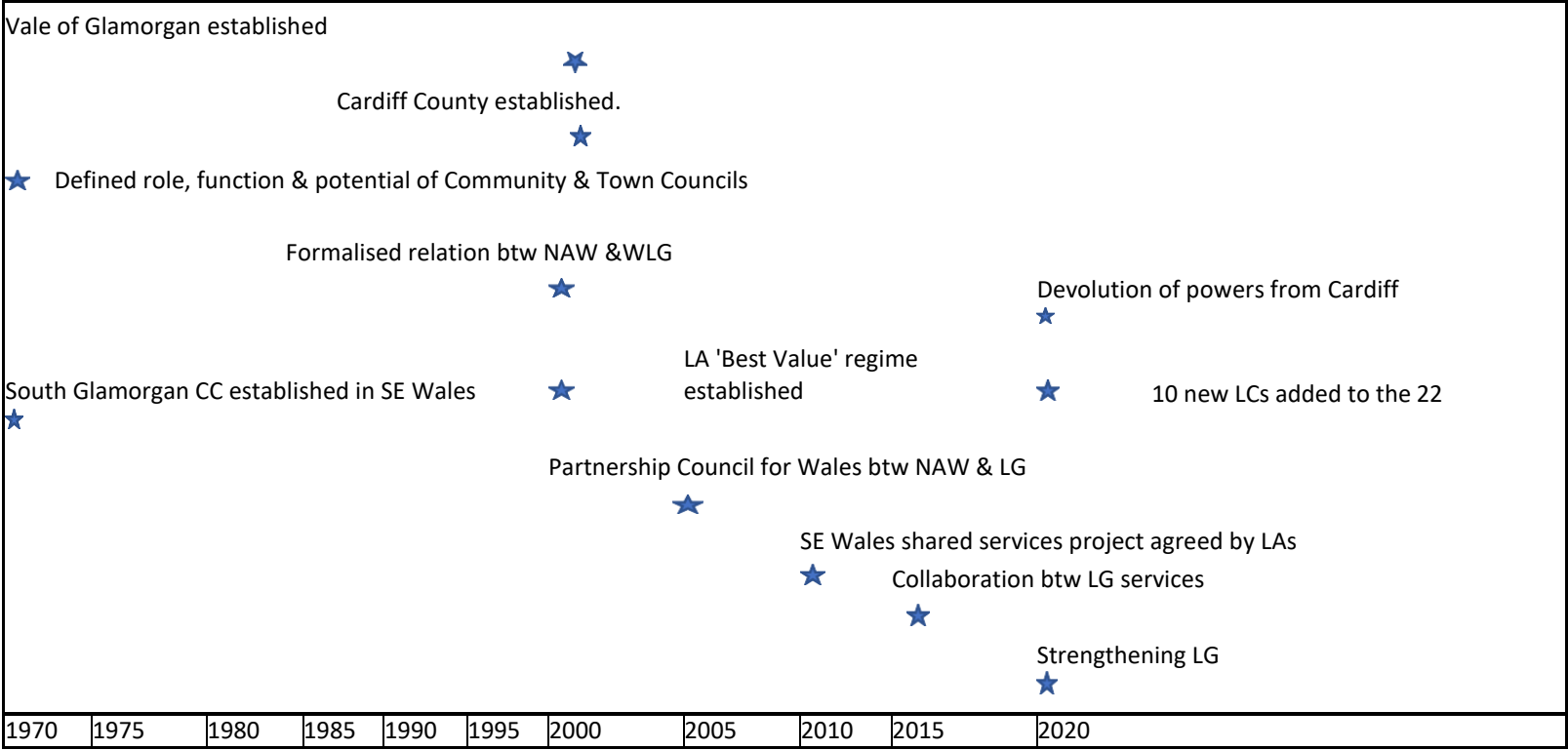
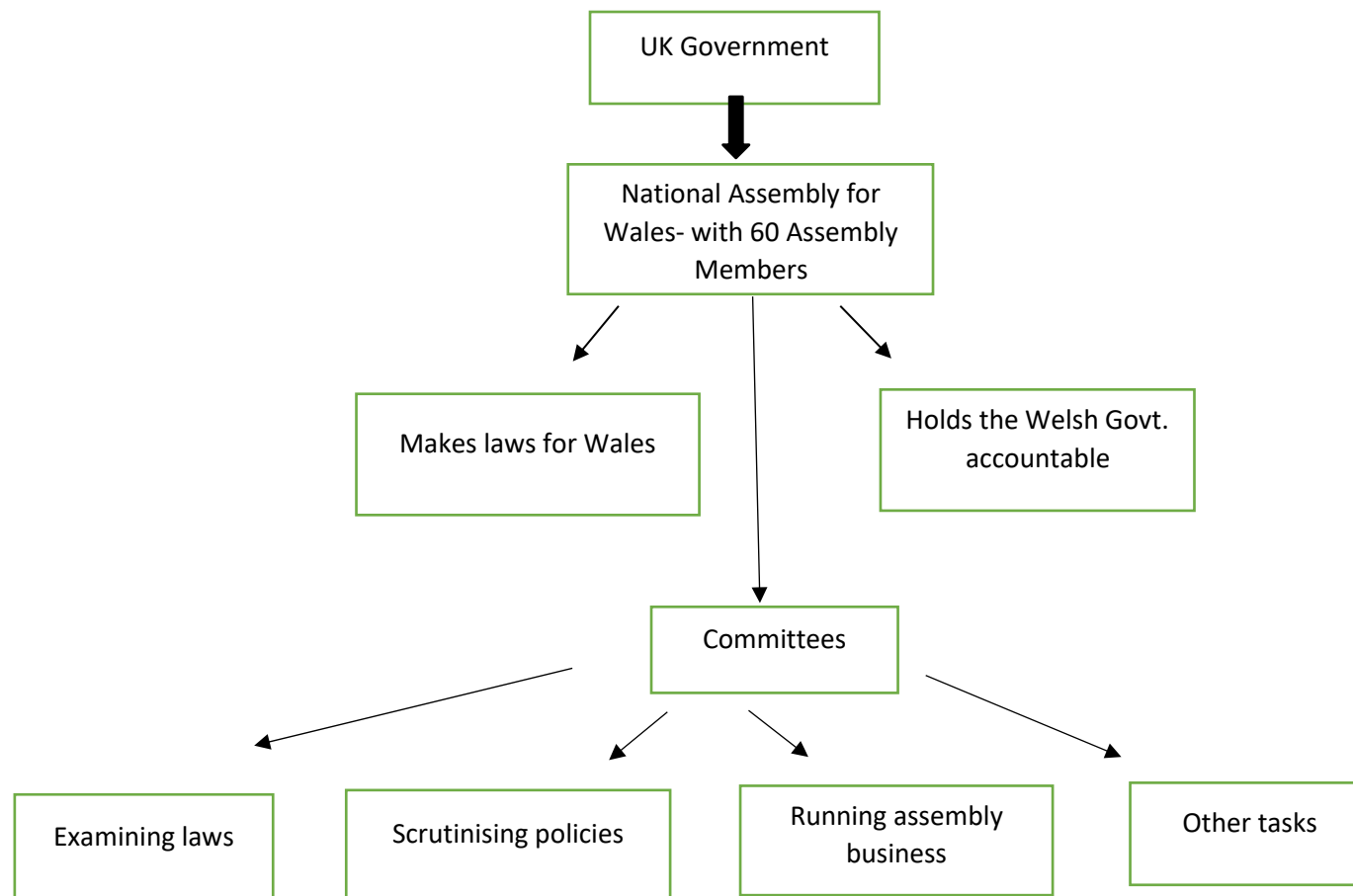


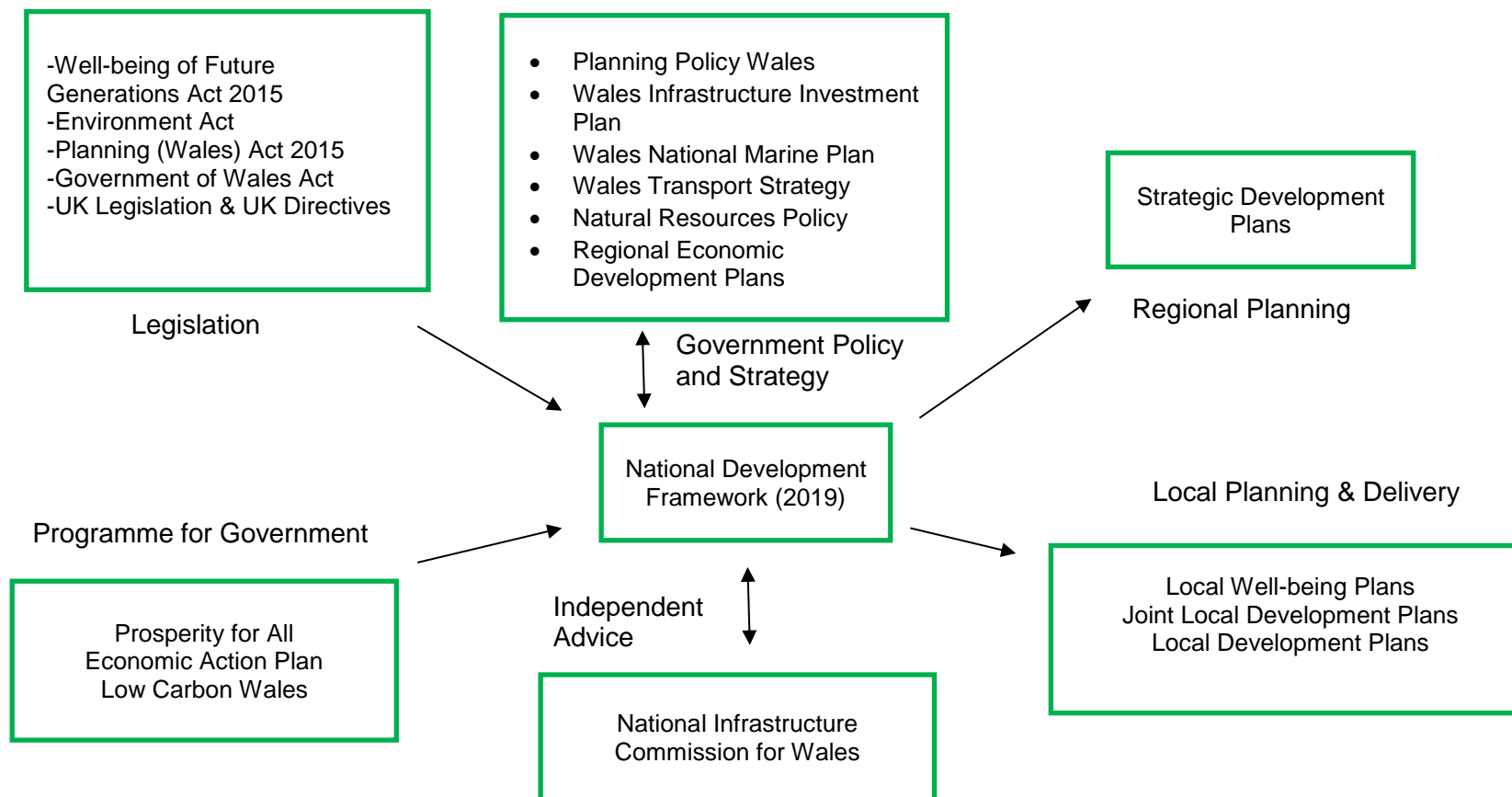
Figure A3: Devolution structure in Wales in 2016



Source: Welsh Government, 2016

The National Development Framework and other development plans

Figure A4: The National Development Framework (NDF) relationship to other plans and policies



Source: National Development Framework, 2019

Figure A4 illustrates the influence of the National Development Framework on the various policies, strategies and development plans in Wales and indicates how the regions are supposed to design their economic development plans strategically through City Deals by aligning and embedding the objectives of the NDF along with the well-being goals. The National Development Framework is influenced by the Planning Policy Wales and the Wellbeing of Future Generations Act which helped shape not only the Welsh Government's strategy and policy planning but also regional policy planning in Wales. This includes planning policies such as the National Infrastructure Marine Plan, the Transport and Natural Resources Plan and includes regional economic planning through Local Development Plans, Strategic Development Plans and Local Wellbeing Plans. Priorities set out in both Planning Policy Wales and the National Development Framework hence influences all regional strategic planning in Wales including South East Wales.

The figures show a two-way relationship between the various governments strategies and policies that helped shape the NDF on the one hand and includes the Transport Strategy, Welsh National Marine Plan and Low Carbon Wales plan. On the other hand, it provided a means of delivery and framework for maximising the potential outcomes.

The NDF and Marine Plan work together to provide a framework for the management of change around the coastal region. Co-ordination between marine and terrestrial planning is important to sustain and facilitate the development of port, harbour and marina businesses and associated enterprises; coastal communities; tourism opportunities; energy generation; and seascapes. The emerging Welsh National Marine Plan has informed the preparation of the NDF and, where relevant, should inform Strategic and Local Development Plans and decisions made through the development management process.

The Prosperity for All Economic Action Plan

The Prosperity for All Economic Action Plan (Figure A5) sets out the Welsh Government's ambition to leverage support for the Economic Contract and Economy Futures Fund through the principles of Prosperity for All (Welsh Government, 2017):

- Public investment with a social purpose;
- Simplification;
- A stronger regional voice; and
- A focus on the long-term.

Figure A5: Prosperity for All, Economic Action Plan



Source: Welsh Government (2017)