



Uchelgais  
Gogledd Cymru  
Ambition  
North Wales



Llywodraeth Cymru  
Welsh Government

# North Wales Regional Economic Framework

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*The walls here, in this tract of land,  
Are something more than walls;  
In the fabric of this building are,  
Of our long history, ancient, ancient yearnings.*

*Here, between salt marshes and mountains  
The Welsh have, for ages long past -  
Their princes and their bondsmen -  
Hewn hope from rocky places  
And felt a surge, like the surge of the sea,  
Thrusting together, as great stones and fragments,  
A building which now has become  
For us an emblem of a Nation.*

*Gwyn Thomas*

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Gwyn Thomas was invited as the National Poet for Wales to create a poem for the opening of the Welsh Government office at Llandudno Junction. If we read 'building' to mean 'region', the poem reflects the ambition of the region over the centuries. The Welsh version is published by Barddas, Profiadau Inter Glactig.



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# Ministerial Foreword

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Firstly, I would like to thank the partners across North Wales for working tirelessly for the benefit of the region, particularly in the face of recent challenges.

The Regional Economic Framework should tackle the challenges we face and improve the lives of people across North Wales. It should allow us to put collaboration ahead of competition, showing how we will act to maximise fairness for all and eliminate inequality at every level of society. It sets out our shared top priorities to address the damage to our economy caused by decades of austerity, Brexit and the impact of coronavirus. Therefore, providing decent jobs, relevant skills and new training opportunities. Together, we will embed our response to the climate and nature emergency in everything we do and deliver

a green transformation which starts in our local communities. We will achieve this by strengthening the resilience of our natural and built environments to the impact of a changing climate and by enabling an economic transformation that will eliminate our reliance on fossil fuels, creating the industries and the jobs of the future. This will mean having to face very difficult discussions and decisions in the region.

We are working in partnership with the North Wales Economic Ambition Board and other partners to build an economy based on sustainable jobs and fair work. I commend the Board's foresight of having key partners from both economic development and education around the table, thus ensuring that both of these areas are embedded in every decision. In partnership, we will



...Together, we will embed our response to the climate and nature emergency in everything we do and deliver a green transformation which starts in our local communities.

support Welsh businesses to create new jobs, innovatively tackle our challenges and create opportunities, find new export markets and invest in the sustainable green industries of tomorrow. Combined, these will support our goal of a zero-carbon Wales.

The Framework, co-produced with our regional partners, has a key role in ensuring activities at all levels align to focus our resources where they can have greatest impact. Communities are central to this. We are committed to delivering a stronger regional voice and an approach that builds upon North Wales' existing collaboration in relation to economic and community development.

Across the public sector, we need to understand our individual and collective roles to support the region, including working with the communities we serve by working with the third sector and private sector to deliver a just economy.

Corporate Joint Committees (CJCs) provide further opportunity for Local Authorities to work together and with the Welsh Government across a number of policy areas including economic wellbeing.



**Vaughan Gething MS**  
Minister for Economy

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# Chair of the North Wales Economic Ambition Board – Foreword

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As Chair of the North Wales Economic Ambition Board, I am delighted to see this first iteration of the Framework published. I am immensely proud of this region – it has so much to offer its residents and the world. From its fantastic environment to its unique communities. We need to ensure this framework allows us now to support an economy that is suitable to North Wales, building on all our strengths.

This is the first REF for North Wales and builds on the strong collaborative tradition that we have developed in the region over decades, including working with cross-border colleagues in Ireland, Mid Wales and North West England.

The framework is the result of gathering information and extensive engagement to

co-design with key partners in the region and beyond. It is about putting what we already know onto paper to then allow us to understand how best to collaborate in the future. I am under no illusion; the hard work will be starting now to create the action plan to deliver on the priorities.

North Wales' economy is facing significant challenges. With diminishing resources, it is right that the REF begins the task of determining where to focus; the roles and responsibilities will then follow to set our regional economic direction.

This first version of the REF is intentionally broad and high level, with much of the detailed and technical rationale found in other key documents such as the Economic Vision for North Wales, local development

plans and Working Together to Reach Net Zero: All Wales Plan. The REF is the first stepping stone in a process to ensure we create an efficient and effective means of working together across the region to realise our potential for the benefit of our communities. Future work will lead us to a point where we all know our role in the region, how we support each other within these roles and provide us with the ability to strategically secure funding for the benefit of our communities.

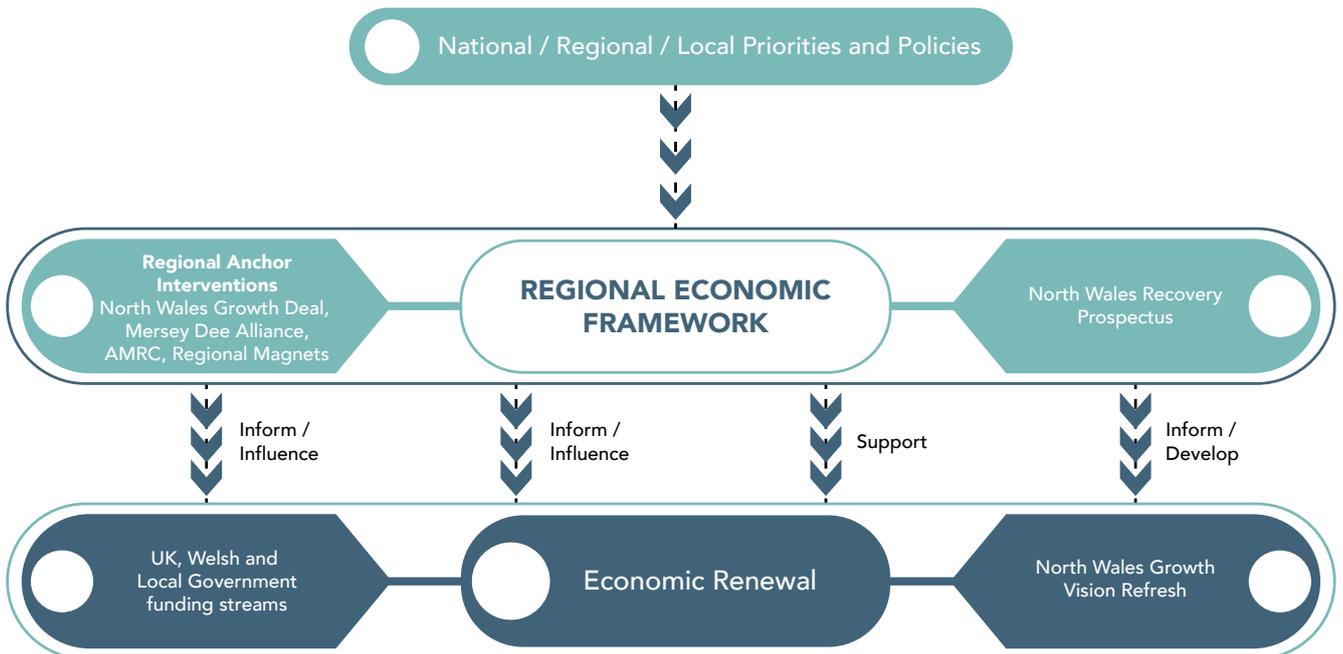


**Cllr Dyfrig Siencyn,**  
Chair,  
North Wales Economic Ambition Board

This REF reflects and builds upon the existing work at a regional level and through a place-based and inclusive approach, echoes the discreet challenges and opportunities of people living and working in North Wales.

I recognise that no individual partner has all the answers. This first iteration of a REF will allow us to move on to the next stage of collaboration, which will involve the production of a delivery plan.

In creating this REF, we build upon the shared values that are based on the Wellbeing and Future Generations Act (these are shared in supplementary documents).



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# North Wales Regional Economic Framework – Mission

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Our mission through this REF is to start creating innovative opportunities to ensure we protect and enhance our natural environment whilst also allowing communities to thrive. Building on our strengths and taking advantage of opportunities where they add value, beyond monetary value alone, to the region.

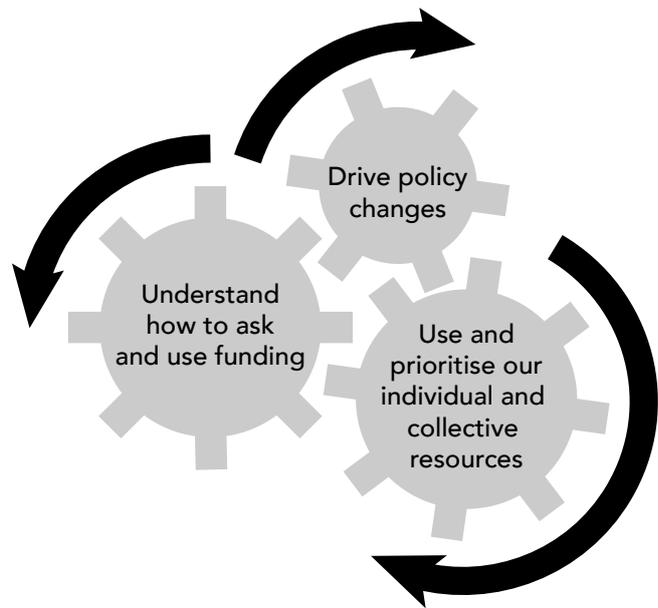
North Wales is a region with a wealth of attributes. People have realised the importance of North Wales since the early beginnings of civilisation. It has been home to Welsh Princes and many bloody battles, which has created a powerful sense of belonging, cultural heritage and appreciation of the landscape. This has led to a wealth of literature and diverse economy which has evolved over the centuries.

The REF is not a rigid or traditional document, it provides a framework to capture how the public, private and third sectors are planning to deliver on its priorities.

The success of the framework will be measured by the individual actions which follow on from its publication. In doing so, we must ensure we take clear action to address the challenges faced and current and future opportunities for the regional economy as a result of the pandemic, EU exit and of course the transition to net zero carbon.

The REF, through its priorities, sets out a path to boost productivity and accelerate sustainable economic and inclusive prosperity by working in partnership with the ecosystem of support to deliver collective impact.

## Key role of the REF



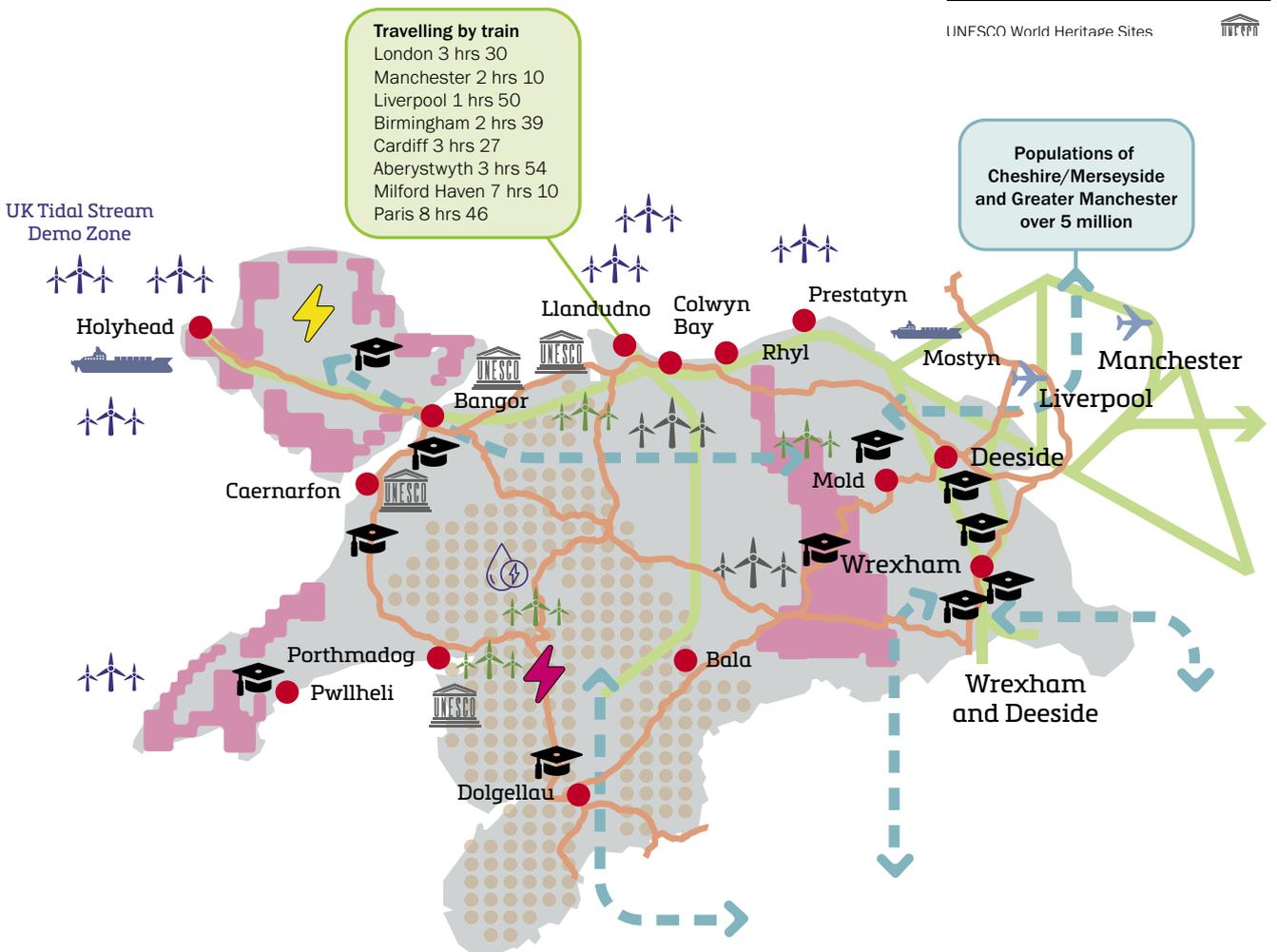
The priorities are flexible and will be reviewed on an ongoing basis, allowing us to better adapt and respond to the dynamic challenges and opportunities of the Region. The priorities are framed in the context of a whole systems approach to facilitate decarbonisation of the economy, adapting and mitigating to climate change and improve the resilience of ecological networks (not in any order):

1. Skills & Workforce
2. Investment in magnets, hubs, supply chains, research and development, innovation and Entrepreneurship
3. Balanced support for indigenous and inward investors
4. Language, culture, place & heritage
5. Foundational Economy and a vibrant Micro / SME base.
6. Empowering communities for the benefit of our future generations

- 7. Connectivity (transport and digital)
- 8. Leverage benefits of public sector
- 9. Low carbon energy
- 10. Food and Drink Industry

Based on stakeholder engagement and initial research (as found in the supporting documents), this document sets out to present priorities which have evolved from the barriers to economic activity and the strengths that already exist. Under the leadership of the North Wales Economic Ambition Board, the Growth Deal has provided a strong basis for the development of the REF.

Ports	
Airports	
Railway	
Roads	
National Connectivity	
Areas of Outstanding Natural Beauty	
National Parks	
Anglesey Energy Island, including Wylfa Newydd	
Trawsfynydd	
Hydro	
Offshore Wind Energy	
Pre-assessed Areas for Wind Energy	
Onshore Wind Energy	
Universities, Higher Education, Further Education	
UNESCO World Heritage Sites	



Population



Just over **700,000** people

Population Change



**6.4%** increase from 2000-2020  
largest Conwy – **8.8%**  
lowest Anglesey – **3.7%**

Population



**2.5%** pop density growth 2010-2020

Population



Population growth rate was **lower** between 2000 and 2020 than between 2000 and 2010

Population



Over **100,000** residents in 4 out of the 6 Authorities. Flintshire, Wrexham, Gwynedd and Conwy

Welsh Language



**204,406** Welsh speakers

Welsh Language



**41%** of people speak Welsh.  
**2.8%** increase since 2010

Economy



2021 – average weekly earnings was **£564.00** – highest of the 4 economic regions in Wales, and above the UK average

Employment



**315,200** jobs in the region in the year ending June 2021. A decrease of **11,300** on the previous year.

Employment



**5,135** new registered businesses across North Wales since 2018 (figure calculated by summing the published rounded figures for 2019 and 2020)

Employment



In 2019, **65,360** active businesses in North Wales: micro (0-9 employees) – **61,745**, small (10-49 employees) – **2,365**, medium (50 – 249 employees) **560**, large (250+ employees) – **690**

Economy



In 2019, North Wales GVA was **23%** of Wales' total GVA

Economy



North Wales' GVA value was **£15.4 billion** in 2019

Connectivity



**18.5km** average distance people travel to work

Connectivity



Digital connectivity **92%** of homes and small businesses having access to at least 30Mb/s



Home to Snowdonia National Park  
**3** Areas of Outstanding Natural



**15** mountains above **3000ft.**, including the highest mountain in England and Wales



**1210** scheduled monuments of national importance



**5** Heritage Coast designations – The Great Orme, North Anglesey Coast, Holyhead Mountain, Aberffraw Bay and Llyn Coast



**3** UNESCO sites (World Heritage Sites) Castles and Town Walls of King Edward in Gwynedd, Pontcysyllte Aqueduct and Canal and Slate Landscapes of Northwest Wales



There are **24** registered landscapes of outstanding or special historic significance



**10911** listed buildings in North Wales of which **184** are Grade I – the highest category and **759** are Grade II\*. There are also **177** conservation areas.



**134** registered Historic Parks and Gardens in the region



Llyn Tegid – Wales's largest natural lake

# The Wellbeing Economy

The REF is based on the principles of a Wellbeing economy. The Wellbeing Economy means taking a different approach to developing the economy for North Wales. It is not simply about economic growth at any cost and requires us to change our focus from growth alone, to sustainable growth, which protects and supports our communities.

This is about recognising the root causes of the challenges we have in North Wales, rather than patching them. It is about creating equality, allowing communities to have the confidence and ability to be sustainable. Allowing the economy to thrive and prosper.

Fundamentally, we need to understand what success will look like for North Wales; whilst important, it is not simply about GDP/ GVA. The role of this first REF is to gradually influence the shift in our thinking from growth alone towards a wider set of metrics, set against the wider priorities such as the climate and nature emergencies.

The REF, following stakeholder discussions, has been structured around three core themes:



Clearly, these create artificial boundaries, and the complexity of the relationships are not to be ignored. These have been created to allow for a readable document. The diagram at the beginning of each theme illustrates the interdependent aspects related to that area.

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# Regional Economic Framework – Priorities

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## 1. The Social and Community Wellbeing Economy



<p><b>Welsh Language</b></p>  <p>Gwynedd highest proportion of Welsh speakers both in North Wales and Wales</p> <p><b>76.9%</b></p>	<p><b>Population</b></p>  <p>2000-2020 the proportion of population aged <b>65</b> and over increased from <b>18.3%</b> to <b>23.4%</b></p>	<p><b>Population</b></p>  <p><b>75%</b> of people aged 16 and over reporting good or very good general health 2017-2018 and 2018-2019</p>
<p><b>Population</b></p>  <p>2000-2020 regional population growth rate of <b>6.5%</b></p>	<p><b>Population</b></p>  <p>2000-2020 Proportion of the population aged <b>15</b> and under fell from <b>19.8%</b> to <b>17.6%</b></p>	<p><b>Welsh Language</b></p>  <p>Number of Welsh speakers up approximately <b>2.4%</b> (year ending December 2020) since 2010</p>
<p><b>Economy</b></p>  <p>Welsh Government funded public sector bodies alone spend <b>£6.3 billion</b> per annum on external goods and services (all Wales)(Manufacturing Future for Wales Framework, February 2021)</p>	<p><b>Higher Education</b></p>  <p>2019-20 <b>17,290</b> enrolments on Higher Education (HE) courses to providers based in North Wales, representing 13% of student enrolments across Wales</p>	<p><b>Labour market</b></p>  <p><b>20.7%</b> economic inactivity (excluding students) rate (year ending June 2021). North Wales saw the largest increase of economic inactivity (excluding students) across Wales compared with the previous year.</p>
<p><b>Connectivity</b></p>  <p>2017-18 <b>1.4 million</b> travel by train, an increase of 20,525 on 2007-08</p>	<p><b>Employment</b></p>  <p>According to Betsi Cadwaladr University Health Board, it employs over <b>17,000</b> staff</p>	<p><b>Higher Education</b></p>  <p>2019-2020 – Bangor University saw the highest number (<b>58%</b>) of HE enrolments to providers based in the region</p>
<p><b>Deprivation</b></p>  <p>Of the <b>191</b> most deprived LSOAs across all of Wales in 2019 – i.e. the 10% most deprived, <b>23</b> of them are within North Wales. Areas of Rhyl and Wrexham feature in the list of top ten most deprived areas.</p>	<p><b>Connectivity</b></p>  <p>2011 Census data shows that on average, working residents in NW had longest commute anywhere in Wales apart from Wrexham, this has increased in each local authority in the region since 2001</p>	<p><b>Connectivity</b></p>  <p><b>75.7%</b> of workers aged 16-74 living in North Wales travelled to work by car, van, motorcycle, scooter or moped</p>
<p><b>Town Centres</b></p>  <p><b>2</b> cities in north Wales – Bangor (18,000) and St Asaph (3,500)</p>		

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## Priorities:

1.1 To work collectively as a region, recognising that how we deliver is as important as what we deliver. By embracing collaborative ways of working, we can maintain and increase our impact despite reduced resources and a capacity across all sectors. Building on the Growth Deal portfolio approach, ensuring cross-border involvement, our collaborative thinking will require immediate action on:

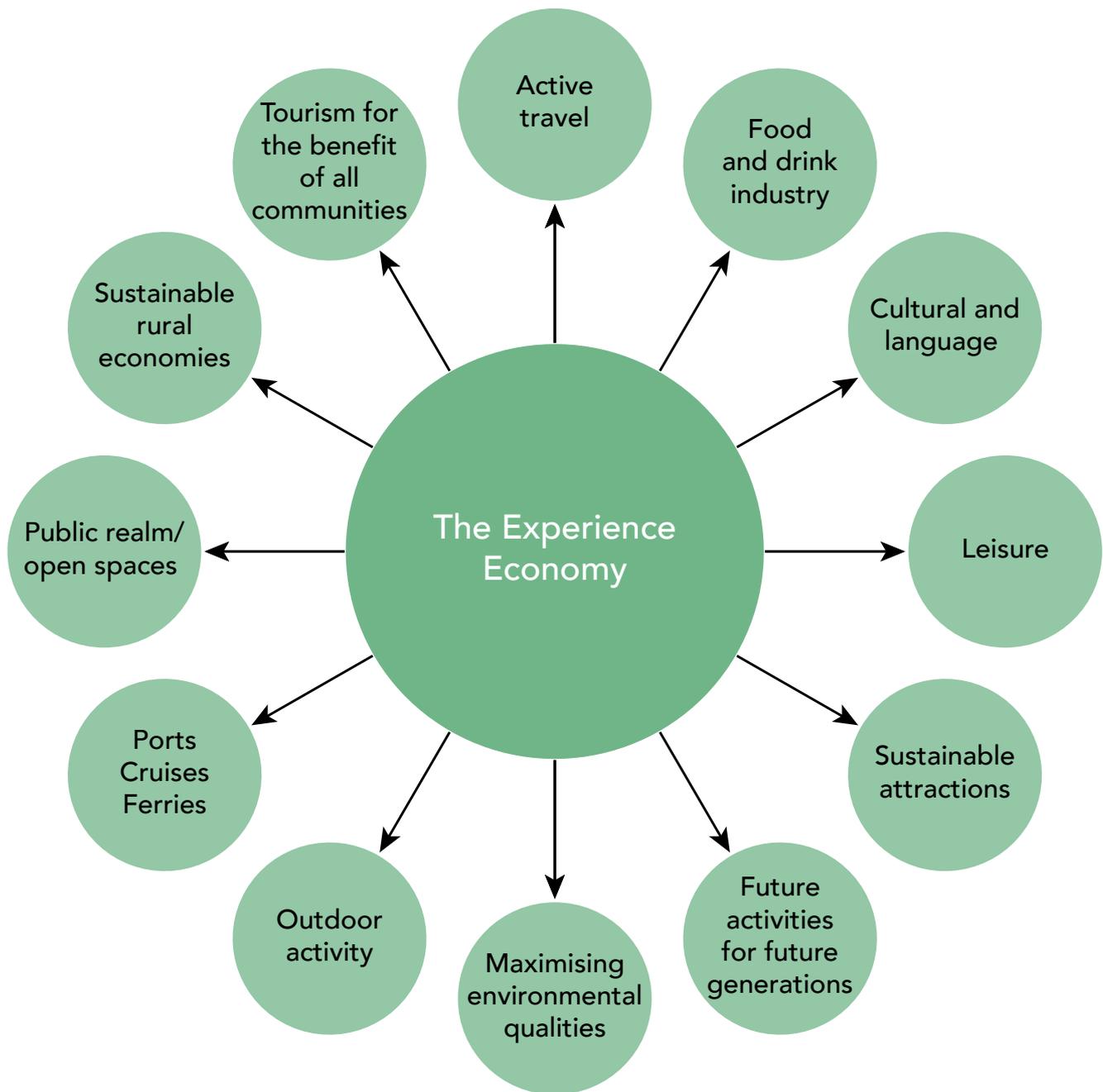
- **Funding** – Understanding how collectively the individual elements of funding can be used more efficiently to create a co-ordinated approach to ensure the required infrastructure, and long term inward investments for the region which will support and provide opportunities for the indigenous supply chain.
- **Evidence** – Identifying a collaborative approach to collate evidence and eliminating gaps across the region to provide baseline evidence for future opportunities and means of measuring a successful and thriving economy in North Wales.
- **Skills** – Developing our understanding of the skills required, ensuring the right skills for a future workforce providing opportunities for all, which provides a living wage.
- **Procurement** – Creating a sustainable procurement process, by ensuring public sector procurement is used to encourage the wider decarbonisation of supply chains. Working with our anchor institutions to establish a strong link with communities in the way companies operate (Social License to Operate). Ensuring that public sector procurement drives development of deep and resilient local supply chains and positive social and environmental outcomes.
- **Supply Chain** – Ensuring a co-ordinated approach to ensure we maximise opportunities for indigenous companies.
- **Climate Change** – Holding difficult conversations to deal with the effects of climate change and to ensure we meet our net zero targets whilst also providing for a thriving economy and communities.
- **Safeguarding Communities** – Supporting the acceleration in home building by councils, housing associations and private developers whilst ensuring these are delivered for the benefits of local communities using local skills and materials wherever possible.
- **Social Care** – Supporting the resilience of the Social Care economy and workforce recognising that the region has a high population of residents over 75years old in our communities.
- **Digital connectivity** – Ensure that all areas of the region have the digital connectivity required to work in a virtual world to allow for equality to access jobs.
- **Research, Innovation and Entrepreneurship** – Supporting our public services and private business with a real focus on local indigenous SMEs.
- **Transport connectivity** – Protecting and enhancing services to Ireland and cross-border to England and into mid Wales, ensuring access to public and active transport modes. Allowing communities to travel with ease in the most carbon efficient means, whilst also strengthening our connection with the rest of Europe and the world, including a focus on the Holyhead master plan.

1.2 To maximise the impact of health service expenditure within the region.

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- 1.3 To secure additional projects associated with new advanced technologies, such as, medical radioisotope, recognising the potential for growth in health research in the area through the North Wales Medical school.
- 1.4 To confidently promote and champion north Wales as a region with a wide range of economic opportunities, including the Growth Deal investments. Enticing our young people to stay and provide an ambitious and attractive place to live, for skilled and well-paid employment and to encourage investment.
- 1.5 To support a strong recovery, working with existing provision, enhance, supplement, and provide targeted and integrated offer to those who want to start or grow a business in north Wales. The region has a high percentage of SMEs, including business owners and the self-employed who face particular challenges and have had less access to Government support. Learn from work in collaboration and build on programmes such as Arfor and Business Wales.
- 1.6 We will need strong partnerships between communities, businesses and councils to enable town centres and villages to capitalise on redefining the role of the local high street. Supporting and allowing smaller businesses to be more competitive, becoming focal centres for remote working and amenities by establishing community hubs which can deliver valuable and create innovative services.
- 1.7 Working with our future generations to understand what they need from our town centres, to ensure we create opportunities for the youth, catering for their needs which will influence them to stay in the region whilst pursuing and progressing their careers.
- 1.8 To ensure the development of a range of bilingual further and higher education courses. Allowing students to develop careers rooted in the region. Utilising the strong collaborative skills capability in the region, building on the opportunities which will come from developments such as the North Wales Medical School, M-SParc and AMRC Cymru.
- 1.9 To maximise opportunities of virtual working to allow opportunities for those living in rural areas. Creating access to work without the need to travel and therefore providing a platform for innovative digital opportunities for the development of multi-language tools to allow users to use the Welsh language and for the region to be a world leader in multi-language interface technology.
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## 2. The Experience Economy



<p><b>Tourism</b></p>  <p>Direct employment <b>42,326</b> (2018, STEAM report)</p>	<p><b>Tourism</b></p>  <p>Economic Impact of Tourism Sector – <b>£3.1 billion</b> (2016) (Wales Wide)</p>	<p><b>Tourism</b></p>  <p>Annual average for tourism expenditure <b>£1.5 billion</b> in 2017-2019 (Tourism profile NW 2017 – 2019)</p>
<p><b>Tourism</b></p>  <p>Anglesey, Gwynedd and Conwy have among the largest proportions of employment in tourism across Wales, after Pembrokeshire</p>	<p><b>Tourism</b></p>  <p>When considering the number of visits to tourist attractions in Wales in 2018, <b>7</b> of the top <b>10</b> paid attractions in Wales were in North Wales: Bodnant Garden, Caernarfon Castle, Conwy Castle, Great Orme Tramway, Nova Prestatyn, Zip World Fforest, and Zip World Slate Caverns</p>	<p><b>Tourism</b></p>  <p>In 2019, a total of <b>2.4 million</b> sea passengers travelled between Wales and Ireland. <b>1.9 million</b> of these passed through Holyhead</p>
<p><b>Public Realm and Open Spaces</b></p>  <p>2018 – <b>5</b> of the top <b>10</b> free attractions in Wales were in North Wales (2018): Gwydir Forest Park, Newborough National Nature Reserve, Pontcysyllte Aqueduct &amp; Trevor Basin Visitor Centre, Snowdon (Walkers) and Tir Prince Fun Park, Racecourse &amp; Market</p>	<p><b>Culture</b></p>  <p>Second homes – areas of Gwynedd and Mon experiencing as much as <b>40%</b> of housing stock as second homes (LDP)</p>	<p><b>Culture</b></p>  <p>In 2019/2020, libraries in North Wales:</p> <ul style="list-style-type: none"> <li>• Welcomed <b>2,317,802</b> visitors</li> <li>• Had <b>218,692</b> members</li> <li>• Employed <b>167</b> people</li> <li>• Loaned <b>2,038,402</b> physical books</li> <li>• Loaned <b>251,471</b> EBook/EAudio titles</li> <li>• Generated <b>£473,250</b> of income</li> </ul>
<p><b>Culture</b></p>  <p><b>36</b> Accredited (or working towards accreditation) museums in North Wales and Wales</p>	<p><b>Culture</b></p>  <p>There are <b>48</b> public libraries in North Wales</p>	<p><b>Culture</b></p>  <p>The Creative industry in NW supports <b>10,800</b> jobs</p>
<p><b>Culture</b></p>  <p>The weekly average earning of the creative industry is <b>£711</b></p>	<p><b>Culture</b></p>  <p>There are more than <b>1,110</b> enterprises linked to the creative industry</p>	<p><b>Culture</b></p>  <p>In 2019, museums in North Wales:</p> <ul style="list-style-type: none"> <li>• Contributed <b>£20,015,174</b> to the local economy</li> <li>• Welcomed <b>1,384,594</b> visits</li> </ul>
<p><b>Culture</b></p>  <p>In 2019 the nine staffed historical monuments sites welcomed over <b>660,000</b> visitors and <b>13,500</b> educational visits</p>	<p><b>Culture</b></p>  <p>There are <b>61</b> historic monuments in state guardianship ranging from prehistoric burial sites to Medieval abbeys and castles</p>	

## All Wales figures

### Sports and Leisure



For every **£1** invested in sport in Wales there is a return of £2.88

### Sports and Leisure



The sport industry in Wales grown by 10% to **£1,142m** in 2016/17

### Sports and Leisure



The sporting economy contributed **£1,182m** in Consumer Expenditure on Sport and generated 29,700 sport-related jobs in 2016-2017, however most of these were located in other regions. (The value of sport in Wales. | Sport Wales)

### Food and Drink



Welsh food and drink exports **£551 million** in 2020 (was growing until Covid hit Wales), a decrease of £19 million from 2019

### Food and Drink



Businesses in the supply chain had a turnover of **£22.4 billion** in 2020, an increase of £272 million from the previous year

### Food and Drink



GVA for Welsh food and drink increased by **3.9%** from 2018 to 2019, from **£3.70bn** to **£3.85bn**

### Food and Drink



Food and Drink exports increased overall from 2016 to 2020 to **£551.9m** (increase of £116.3m)

### Food and Drink Industry



Food and drink sector accounts for **17.8%** of employment in 2019 (239,300 workers) (including farmers and agricultural labourers)

## Priorities:

2.1 In order to support the sustainable development of the experience economy, to protect communities and support industries, we need to react to the most pressing issues collaboratively:

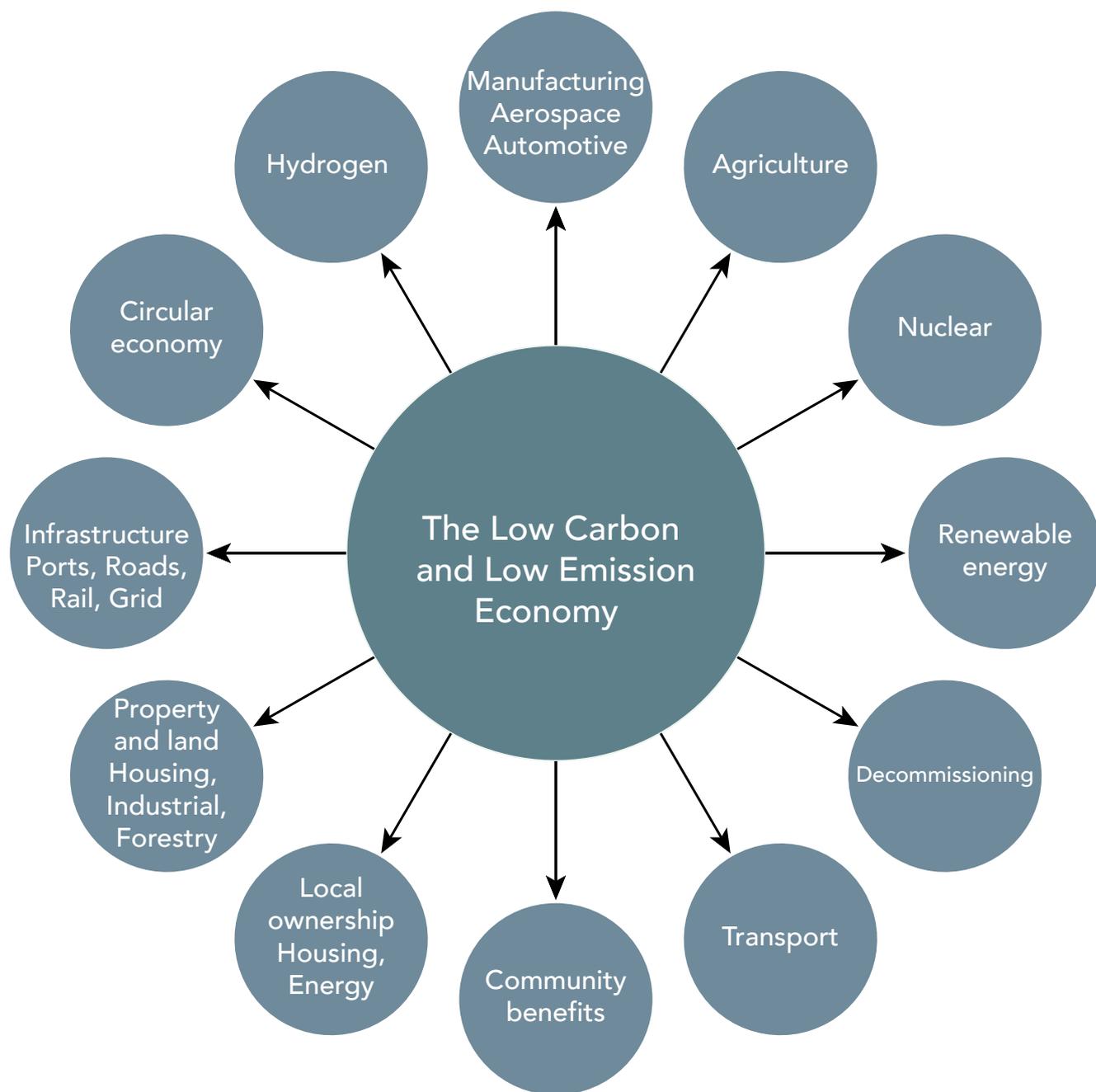
- support local communities to take advantage of and be responsible for supporting the experience and visitor industry in a way which benefits those communities, working across the region and with other similar regions across the UK to develop best practice.
- ensure an all-year tourism offer where appropriate, to create more sustainable opportunities for workforce.
- development of higher-level pipeline of multilingual skills in hospitality, service industries, outdoor pursuits and events management, leading to skilled roles at higher rates of pay.
- develop a food and drink strategy, including community food strategies, for the North Wales region, to grow our businesses' scale, value and productivity as well as benefiting our people and society.
- aligned with the Food Innovation Wales programme, maximise opportunities to ensure our food and drink sector can be UK leaders. Reaching for the highest levels of sustainability and ensuring fair work in Wales is rewarded, heard, and represented.
- work collaboratively through newly established the North Wales Regional Sports Partnership, to drive investment to deliver resources and change at scale.
- strengthening creative industry opportunities across the region which ensures innovative opportunities for the Welsh language and culture to thrive

even more, ensuring that all areas have access to cultural activities.

- 2.2 To work with our indigenous businesses to ensure they are in a strong position to benefit from the visitor economy, providing them with the skills to develop, create new opportunities and to protect local communities and their environment where these activities happen.
- 2.3 To think creatively, by aligning with tourism-related projects, on providing opportunities and facilities for young people by ensuring our town centres have leisure and night-time provision which can compete with other areas, catering for year-round activities to provide a choice for young people. Thus providing a real opportunity for the region to retain its future workforce.
- 2.4 Realising the economic benefits of public realms within our towns, allowing residents and visitors to benefit from parks and open spaces, squares and tree-lined streets.
- 2.5 To ensure that any significant spend in relation to cultural infrastructure or key activity filters through to other activities in the region, maximising the impact of public spend.
- 2.6 To explore opportunities for communities to have active roles in expanding the cultural offer, building on opportunities which have been created in many towns/ villages across the region and are key in keeping our heritage and literature alive and relevant.

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### 3. The Low Carbon and Low Emissions Economy



<p><b>Renewable Energy</b></p>  <p>We host <b>37%</b> of Wales' renewable energy capacity (1,183 MW)</p>	<p><b>Renewable Energy</b></p>  <p>Of the renewable energy installed in the region, of which <b>8%</b> is locally owned</p>	<p><b>Renewable Energy</b></p>  <p><b>85%</b> of the 17,800 low-carbon energy projects in the region were for solar energy</p>
<p><b>Renewable Energy</b></p>  <p>Ynys Mon, Conwy and Wrexham had the lowest low-carbon energy capacity in the region <b>85 MW</b>, whilst Flintshire had the highest with over <b>30%</b> of the region's capacity</p>	<p><b>Renewable Energy</b></p>  <p><b>39%</b> Largest proportion of energy use is for commercial and industrial consumption</p>	<p><b>Renewable Energy</b></p>  <p>NW's total energy consumption fell by 5% between 2005 and 2017 and the greenhouse gas emissions from our energy system fell by <b>28%</b></p>
<p><b>Renewable Energy</b></p>  <p>North Wales consumes nearly <b>25%</b> of Wales' energy, slightly higher than its population of 22% (2019)</p>	<p><b>Renewable Energy</b></p>  <p><b>36%</b> of our homes are EPC band E, F or G</p>	<p><b>Agriculture</b></p>  <p>Total emission from agriculture sector in Wales have declined by <b>12%</b> between 1990-2016</p>
<p><b>Agriculture</b></p>  <p>Agriculture emissions dominated by methane (62%) and nitrous oxide (28%), with 10% of sector emissions as carbon dioxide. This reflects the dominance of livestock enteric emissions (largely from sheep and cattle), which accounts for <b>54%</b> of the sector's emissions in 2016.</p>	<p><b>Transport</b></p>  <p>Workers living in NW aged 16-74 travel to work (census 2011):  <b>75.7 %</b> (237,000) by car, van, motorcycle, scooter or moped  <b>11.9%</b> (37,000) on foot or by bike  <b>5.1 %</b> (16,000) by train, bus, minibus or coach</p>	<p><b>Transport</b></p>  <p>2019 – <b>567,000</b> lorries and unaccompanied trailers passed through Welsh ports to and from Ireland. 81.9% of this traffic went through Holyhead (see StatsWales)</p>
<p><b>Nuclear</b></p>  <p>In Wales, there are <b>893</b> people employed directly in nuclear industry organisations</p>	<p><b>Nuclear</b></p>  <p>2016 estimate put the GVA contribution of the average nuclear worker to the economy at <b>£96,600</b></p>	<p><b>Waste</b></p>  <p>2020 over <b>65%</b> of waste in Wales recycled</p>
<p><b>Manufacturing</b></p>  <p>Commercial and industrial electricity consumption constitutes <b>71%</b> of all electricity consumption in the region</p>	<p><b>Infrastructure /Ports</b></p>  <p>2018 Holyhead had the third largest volume of freight traffic – <b>5.2 million tonnes</b></p>	<p><b>Infrastructure / Roads</b></p>  <p>The A55 – <b>87 miles</b> crossing 5 of 6 local authorities in North Wales, forming part of the trans European network</p>

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## Priorities:

- 3.1 To work collaboratively across every sector, especially with the utility sector, to create Low Carbon Energy and Green Growth Route maps. Developing and implementing a coherent, multi vector energy system which provides a consistent approach to exploiting opportunities in low carbon and green growth to maximise skills capability and wider benefits to local communities and ensuring the pound stays local.
- **Hydrogen Route Map** – Continue to develop a route map to understand how the opportunity for the deployment of Hydrogen across the North Wales Region can best be delivered, maximising the expertise, assets and benefits that could be derived.
  - **Low Carbon Energy** – Welsh Government and Regional Partners to prepare an action plan to deliver the North Wales Energy Strategy, which highlights the scale of the economic opportunity presented in the drive to achieve net zero.
  - **EV charging** – To work collaboratively to deliver a network across the region ensuring that every community has the access required to the infrastructure.
  - **Energy efficiency** – To improve the energy efficiency of the region's housing and accelerate the decarbonisation of North Wales' building stock and to ensure a significant shift in the way homes are heated and their level of energy efficiency across the region.
- 3.2 To collaboratively work across the region to develop a sustainable supply chain, skills and port infrastructure to support the offshore wind and marine industry in the region and globally:
- **Tidal stream** – Building on work that is already taking place to ensure local companies can be competitive to support this growing industry.
- **Tidal range (lagoon)** – Continue to explore the potential of this industry in North Wales and ensure we have the supply chain ready to support.
  - **Offshore wind** – Working with the developers of fixed offshore wind to ensure we create sustainable long-term opportunities for supply chains and ports in the region, creating a strong platform to also support floating offshore wind and wave.
- 3.3 Pursue a just energy transition, keeping wealth local and ensuring our communities and public institutions have a say over, and stake in, how we generate and save energy.
- 3.4 Establish ways in which energy generation on sites and the retrofit of properties can be done in a way that builds community wealth, ensuring local businesses and people benefit from the amount that will be spent on the energy transition.
- 3.5 Seek opportunities to support and invest in the low carbon economy at key locations, projects and facilities in North Wales. This includes marketing the region as a location of choice for future investment alongside providing support for the Welsh supply chain to compete for work across the UK and overseas for:
- **Nuclear** (new build and decommissioning at Wylfa and Trawsfynydd),
  - **Offshore wind** (including decommissioning),
  - **Marine** (tidal stream and range) energy
  - **Hydrogen**
  - **Holyhead Gateway**
  - **Space, aerospace and automotive** (manufacturing, R&D and key locations)

including Deeside / Wrexham cluster, Llanbedr and Valley).

- 3.6 To optimise North Wales' place in the knowledge economy, with partnerships and facilities such as the Northwest Nuclear Arc, Optic Glyndwr and M-SParc, enhancing a place-based network of R&D facilities and supply chain companies stretching from Cumbria to North Wales and encompassing Lancashire, Greater Manchester, Cheshire and Sheffield City region.
- 3.7 To reposition High Value Manufacturing (HVM) for post-Covid, post-Brexit and low carbon future by delivering the Framework for the Future of HVM, particularly in relation to Industry 4.0, digital technology and automation, building on our investment in Advanced Manufacturing Research Centre (AMRC) Cymru and planned development of Advanced Technology Research Centre (ATRC). This will be critically important in securing innovative opportunities in North Wales to reduce emissions by working with academia to use more recycled content through a circular economy approach.
- 3.8 To work regionally with the development company Cwmni Eginio Cyf to ensure we maximise the opportunities across the region for nuclear and potentially other forms of energy generation.
- 3.9 Many parts of North Wales suffer from poor public transport connections, which impacts on residents' access to jobs, education and training. We need to continue to promote active travel, deliver road safety schemes and encourage a return to public transport as the reliance on the private car is growing. We need to work together to source investment in new strategic transport links and to approach opportunities to achieve shifts to lower carbon transport modes:
- **Active transport** – Providing a true alternative to communities, recognising the importance of the role of the communities in this, especially to change the behaviours of society.
  - **Public transport** – Working in partnership to ensure public transport provides an alternative to the car across the region as well as cross-border.
  - **Cycle and walking networks** – Build on the work taking place to create a safe alternative across the region.
- 3.10 We need to develop a resilient and prosperous agriculture industry, which reduces its carbon emissions through a range of approaches, including the development of improved efficiency in livestock and crop production, nutrient management and increasing the sustainability of farm assets, building on current and planned activities at Glynllifon and Llysfasi.
- 3.11 To work with the agricultural industry to support innovation and maximise the economic opportunities of agricultural products to ensure the industry leads in terms of sustainability.
- 3.12 Work jointly to implement systemic change in consumption emissions to ensure we keep resources in use for as long as possible and find new uses for resources, ensuring that community hubs play a key role and that decommissioning is a key consideration in any project taking place in the region across all sectors.
- 3.13 To work jointly to improve the way we manage our natural resources by ensuring that any future opportunities build and create a resilient ecosystem, creating actions to improve it that

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complements the implementation of technological solutions, resource efficiency (maximising product life) and investing in solutions to support the circular economy.

# Next Steps

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The immediate next steps will be to establish, via the Economy Recovery Group (and other key partners), a delivery programme. This will include considering how we prioritise the priorities, and who is best to lead on those delivery packages, recognising and respecting existing regional governance and delivery architecture.

Some of this work is already taking place and we will therefore need to have a better grasp of all the ongoing work, the funding packages under each priority area before creating new areas of work.

