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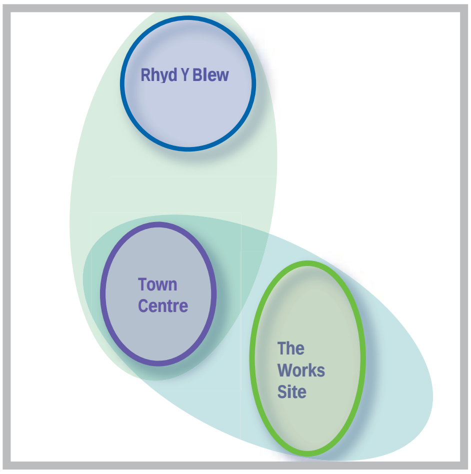


EBBW VALE
SUSTAINABLE REGENERATION FRAMEWORK
ANNEX DOCUMENTS A-H

APRIL 2011

Cyngor Bwrdeisdref Sirol
Blaenau Gwent
County Borough Council

Annex A

Key Regeneration Policy Objectives

1 *KEY REGENERATION POLICY DOCUMENTS*

UK, Wales, regional and local policy documents have been reviewed in the development of the Sustainable Regeneration Framework. A summary of much of the wider policy is available in the Local Development Plan.

The following four key regeneration documents have been identified as particularly relevant to the development of this framework:

- Heads We Win... A Strategic Framework for the Heads of the Valleys (WAG 2005)
- Blaenau Gwent Emerging Local Development Plan – Deposit Plan – January 2011 *(draft)*
- Blaenau Gwent Regeneration Strategy – March 2009; and
- Ebbw Fawr Valley Holistic Area Regeneration Plan (HARP) 2008.

UK, Wales, regional and local policy documents have been reviewed in the development of the Sustainable Development Framework. A full policy summary is provided in Annex A:

1.1 *HEADS - WE WIN… A STRATEGIC FRAMEWORK FOR THE HEADS OF THE VALLEYS (WAG, 2005)*

The Heads of the Valleys Strategic Framework is a programme devised to ensure success in the South East Wales region, encouraging people to settle in the area and driving economic improvement. The Framework reinforces the spatial priorities of the Wales Spatial Plan through focusing on Ebbw Vale as a hub of strategic growth and development

The Framework aims to:

- unlock the potential of people in the area through improving health, improving skills and spreading opportunities;
- unlock the potential of the place through housing renewal, improving the built environment, improving the use of physical resources, improving transport networks, and promoting innovation and growing business;
- build a confident future by putting the community first, improving awareness and helping to change perceptions; and
- deliver change by providing a framework for change, and maximising the impact of activities undertaken by the Government.

1.2 *BLAENAU GWENT EMERGING LOCAL DEVELOPMENT PLAN –JANUARY 2011 (DRAFT)*

The LDP deposit plan seeks to provide a clear vision for the delivery of future development within Ebbw Vale. The intention of the LDP is to address 14 challenges to the future of Ebbw Vale (as set out below). These challenges set out the context against which The Northern Corridor and the Town Centre areas addressed in this Sustainable Regeneration Framework have sought to have a positive influence:

Challenge 1: Economic diversification The area suffers from high levels of unemployment and economic inactivity, high benefit dependence and limited employment opportunities which together result in low household incomes. A key challenge for the area is to secure jobs for the future. This will mean increasing the proportion of jobs in sectors with good growth prospects, such as services, knowledge-based business, advanced manufacturing, tourism and sustainable technologies. The challenge is to provide land, services and environments that will draw investment.

Challenge 2: New roles for town centres The town centres suffer high vacancy rates and low presence of national retailers compared to other valley towns. Most suffer as a result of the dominance of out of town food retail stores. A key issue is that the town centres compete against each other and have no clear roles. The challenge is to provide a new retail hierarchy, identify clear roles and limit damage from out of town retail development.

Challenge 3: Stabilising the population The area has been losing population since 1921, as a result of people leaving the area to find employment elsewhere. One of the problems with net out migration is that it tends to be biased towards those more mobile and economically active. The challenge is to provide land for housing and provide the jobs to retain people in the area.

Challenge 4: Meeting housing needs and improving housing A high proportion of Blaenau Gwent's housing is pre 1919, with 20% of this being either unfit or being in need of substantial repair. There is also a shortage in terms of flats and detached properties. More recently, affordability has become an issue as house prices rose dramatically in 2006. The challenges are to ensure new developments contain a mix of house types and tenure; that social sector housing meets the Welsh Housing Quality Standard benefiting the environment; reducing the number of vacant properties; and improving the quality of the private housing stock.

Challenge 5: Improving education attainment and skills A high proportion of adults have no qualifications and education attainment is generally low. Whilst education attainment has improved considerably, lately, more needs to be done in this area. The challenge is to ensure that the infrastructure is put in place to deliver the Children and Young People's Plan (2008-2011) and that these facilities can be accessed by all.

Challenge 6: Improving accessibility Being able to access services, jobs and markets is a key requirement for any area to be successful. Good links are required both inside and outside of Blaenau Gwent. The challenge is to help develop a transport network which improves connectivity within and outside of Blaenau Gwent. The dualling of the Heads of the Valleys road and improvements to the Ebbw Railway are key.

Challenge 7: Creating a network of hubs Blaenau Gwent is made up of a number of towns and villages but only a few are large enough to be self sufficient in terms of comprising an adequate range and mix of services. As a consequence, it is vital that a network of hubs is created to provide the right level of services for the area. This network of hubs is also a key part of delivering sustainable settlements where local and regional services can be easily accessed through sustainable modes of transport.

Challenge 8: Supporting sustainable transport For those trips that do have to be made a much greater proportion will need to be by walking, cycling and public transport. This would also make a significant contribution to reducing carbon emissions and provide for those without access to a car. Blaenau Gwent has low car ownership and a poor evening and Sunday bus services. The challenge is to create an environment and transport network in which it becomes a more attractive choice to walk, cycle or travel by public transport.

Challenge 9: Promoting health and well-being for all Safeguarding and renewal of settlements needs to take account of all aspects of the quality of life of those who live there, including safety, health and freedom from disturbance. In particular, Blaenau Gwent has low life expectancy and high numbers of people with limiting long-term illness. Fear of crime is also a key issue for residents. The challenge is to create environments that promote safety, health and a sense of well-being for all.

Challenge 10: Creating a place which prizes its green environment The setting of Blaenau Gwent, bordering the Brecon Beacons and the Vale of Usk, with its rugged mountains looming peacefully over it's three valleys, is a major asset which needs to be appreciated by residents and visitors alike. The natural environment with its variety of wildlife is valuable in its own right but can also contribute to the economic and social well-being of the area. The challenge is to protect and enhance the natural assets both to support the regeneration of Blaenau Gwent and as features in their own right.

Challenge 11: Creating places with a distinctive sense of identity Blaenau Gwent has a distinctive, location history and townscape and this is a further potential key to the area's transformation. This will mean bequeathing to future generations the best of the legacy of the past, including it's heritage as an iron, coal and steel producer, it's links with the Chartist movement and as the birthplace of Aneurin Bevan. The Challenge is to protect and enhance the best of it's buildings and townscape.

Challenge 12: Sustainable use of natural resources Responsible use of the area's physical resources is a key part of a better future. Air and water pollution, noise, land contamination and dereliction have long blighted the area and affected people's health and well-being and this is a legacy which needs to be remedied. Climate change means that the areas subject to the risk of flooding are growing. The amount of waste going to landfill is significant and needs to be reduced. The exploitation of minerals needs to be limited. The challenge is to: help ensure that the physical environment is safe and healthy; that land is used efficiently; waste is minimised, recycled and processed sustainably; and the re-use or recycling of construction and demolition material and industrial wastes serves not only to reduce the amount of waste produced but also to conserve scarce resources and minimise environmental damage.

Challenge 13: Sustainable design and development Blaenau Gwent has the potential to generate much more of its own energy by sustainable means that reduce carbon emissions. The design and layout of buildings could contribute to a reduction in the consumption of energy and emission of greenhouse gases. Meanwhile, some change in climate is certain to occur and it will be necessary to adapt to this in the future development of the area. The challenge is to help, through the development process, to achieve the potential for reducing greenhouse gases and impacts of climate change.

Challenge 14: Spreading the benefits of regeneration Alongside the challenges there are opportunities which need to be taken. For example, the closure of the Tin Plates Works in Ebbw Vale in 2002 brought fundamental changes to the structure of the Blaenau Gwent economy, taking away a source of well paid, secure employment. It now represents a massive transformational regeneration opportunity that will have a profound impact on the local environment and economy. In addition, plans for this site, has created a further key regeneration opportunity north of Ebbw Vale Town Centre. The challenge is to ensure that the benefits of regenerating these sites are spread across Blaenau Gwent.

The Northern Corridor and Town Centre Regeneration Framework set out herein is strongly in accordance with the aspirations and policies of the Local Development Plan.

1.3 BLAENAU GWENT REGENERATION STRATEGY, MARCH 2009

The strategy provides a platform for the regeneration of the county over a ten year period taking into account changes in the county since 2002 and the current situation including deprivation with regard to income, health, education and opportunity as well as business performance. The strategies overarching principle is to share the benefits of regeneration widely through the following principles:

- Principle 1: Diversify The Economy And Develop Manufacturing;
- Principle 2: Boost Business Support And Enterprise;
- Principle 3: Promote Learning And Modern Skills;
- Principle 4: Focus Investment In Key Communities;
- Principle 5: Deliver The Works as a National flagship; and
- Principle 6: Develop the Transport Infrastructure.

Key actions include:

- creation of community hubs in the main urban areas;
- completion of 'The Works' at the former Corus Steelworks Site;
- provision of new business sites

- improved transport including completion of dualing of the Heads of the Valleys road and development of the rail line; and
- improvements to local areas and Town Centres.

The strategy requires investment from WAG, the council, the NHS and EU as well as voluntary and community organisations and the private sector.

1.4 *EBBW FAWR VALLEY HOLISTIC AREA REGENERATION PLAN (HARP) 2008.*

The HARP was submitted to the Heads of the Valleys (HoV) programme team as one of four regeneration areas in the Blaenau Gwent area of the HoV. The HARP complements the Blaenau Gwent Regeneration Strategy and assesses the main issues and opportunities in the area, current project and projects to be implemented.

The issues in Ebbw Fawr Valley were identified as:

- Integration of existing Town Centre with development on The Works site;
- Anti social behaviour in certain areas;
- Inadequate highway network to cope with planned development in the area;
- Need to develop a wider choice of modern housing in most of the settlements.

while the following opportunities were identified:

- Redevelopment of steelworks site;
- Learning Campus; and
- Good rail links.

Projects currently underway include:

- 'The Works' – redevelopment of the former steelworks site;
- regeneration of the Town Centre – improvements to public realm and refurbishments;
- Church Street regeneration;
- redevelopment of the Ebbw Vale Institute;
- Town Centre Manager; and
- Rail link at Ebbw Vale parkway.

Planned projects include:

- Northern Gateway Public Realm Enhancements – streetscape works are required to enhance the environmental quality of the public realm.

- Physical Regeneration Grants -to assist existing and new businesses renovate and modernise Town Centre properties.

- Cross Valley Community Links – Former Steelworks/Town Centre/Church Street – to create four pedestrian links to and from the steelworks redevelopment.

- Church Street Regeneration – masterplan includes grants business, environmental improvements, realignment of the road junction provision of car parking for residents and users of the EVI (Ebbw Vale Institute) and improvement of the pedestrian link to the Town Centre.

- Public Realm Enhancements Rear of Bethcar Street & Improved Bus Terminal and Taxi Rank.

- Ebbw Vale Institute Development - to fully restore this historic building to its former glories, redeveloping it as a vibrant cultural and business development space.

- People and Wildlife -to empower communities and increase their capacity for environmental action. The project includes the construction of an Environmental Resource Centre in the former steelworks site.

- Ebbw Fawr Information Shops - make improvements to the information shops to ensure that they provide a good quality resource for their community.

- Blue Lakes - to create a new country park encompassing tourism and heritage development.

Additional projects are also planned at the county level these include:

- Green Open Space - to improve access and distance of green space.

- Healthy Neighbourhood Retailing – support to businesses committed to promoting the health and well-being of children, young people and families.

- Woodland Management Plans - To ensure that Blaenau Gwent woodlands are managed in accordance with WAG's Woodlands for Wales strategy.

- Promote, Progress & Promote:- the heritage of Blaenau Gwent, by site signage, artistic engagement pieces, interpretation of key sites and involvement in regional campaigns.

- Borough Wide Valleys Cycle Network – to will create 855km of routes regenerating former tramways, railways and canal towpaths to link together the main towns.

- Community Focused Schools Extension - expand out of hours learning and services in schools.

Annex B

Ebbw Vale Regeneration Assessment and Baseline Market Review

Ebbw Vale Regeneration Assessment and Baseline Market Review

June 2009

Contents

1. Introduction

The baseline review has been prepared by DTZ to provide a current overview of the commercial sectors in Ebbw Vale, in the context of regional and national activity. This report will form part of the supporting information for the development of the Ebbw Vale northern corridor and town centre regeneration framework.

The purpose of this review is to provide a robust baseline assessment of the key commercial property sectors in the town in order to understand the core development parameters which will inform the regeneration of the town. It is important that an overview of the existing and emerging commercial picture is established for its future growth.

A summary of each of the current commercial and development market by core sector is provided in the following chapters. For the purposes of this baseline report, DTZ have primarily utilised statistical information from our in house research team, 'PMA' (Property Market Analysis) PROMIS, and Focus.

2. Ebbw Vale – General Overview

Ebbw Vale is located in Blaenau Gwent County Borough Council (BGCBC). Ebbw Vale is identified in the Local Development Framework as a Principal Hub within BGCBC and therefore should be considered in the same context as nearby towns such as Merthyr Tydfil, situated to the south west of Ebbw Vale approximately 16km (10 miles) away; Pontypool, situated approximately 24 km (15 miles) away. Ebbw Vales nearest regional city is Cardiff, approximately 48km (30 miles) south of Ebbw Vale.

Ebbw Vale has good road communications via the A406 and B4486. There is also easy access to the A470 which is the principal route into Cardiff. In addition, the A465 Heads of the Valleys road runs to the north and is due to be upgraded in the near future. Ebbw Vale Parkway station provides an hourly service to Cardiff and Rail services to London Paddington are available in approximately 3 hours 50 minutes via cardiff.

The population of Ebbw Vale is estimated to be circa 9,000, which equates to approximately 13% of the total population of Blaenau Gwent.

The Mosaic Consumer Classifications illustrate that Ebbw Vale has an above average representation of Blue Collar Enterprise, Municipal Dependency and a below average representation of Grey Perspectives, and Welfare Borderline. This translates to a slightly lower than average number of supervisory clerical junior managerial/administrative/professional number of workers, and an above average number of semi skilled and unskilled manual workers.

The Works regeneration of the former Corus steelworks site, is of such significance that its re-development is a strategic issue to BGCBC. The Masterplan proposes a mix of uses including a Learning Campus, Hospital, Leisure Centre and Sports Pitches, an arts centre and, high quality offices and around 500 homes. Mixed-use areas will be residential led with local amenities and smaller business units. The development of The Works site will be phased over several years.

3. The Retail Market

In the UK

The UK retail market outlook at Quarter 1 2010 remains uncertain. Fears that the economy could contract in Quarter 1 now appear unfounded, although it does look probable that quarterly growth will be a little slower than in Q4. It is expected that consumer spending will only make a modest positive contribution to growth this year. On the positive, UK retail like-for-like sales grew by 2.1% over the quarter driven by growth in the food sector and strong sales in Central London, and retailer administrations were at a four year low in the quarter.

UK retail sales rose by 4.4% in March 2010, and 6.6% on a total sales basis boosted by Good Friday and Easter Saturday falling in March, rather than in April last year. Despite this fact, and the weak comparables last year, these were still relatively positive results particularly in the food sector which were boosted by intense promotional activity. Non-food sales growth was mixed, with strength in homewares, but women's clothing and footwear struggled.

There have been a number of trading results released during Quarter 1, with the majority showing like-for-like sales growth, albeit against relatively weak comparables the previous year. Food retailers continued to enjoy strong trade, particularly the supermarkets, as shoppers stocked up on essentials due to the cold weather. The fashion sector also enjoyed strong trading with particularly encouraging results from Primark and Moss Bros. The value formats are sustaining their momentum and are taking market share from the mid-market retailers. Some of the weaker formats have failed to survive, resulting in a re-distribution of expenditure to the remaining value operators. Retail administrations were actually down 65% year-on-year in Quarter 1, according to Deloitte. The number of companies falling into administration in Quarter 1 2010 fell to 44 compared with 124 in Quarter 1 2009. This was the lowest number of retailers to enter into administration in a quarter in four years, demonstrating that many retailers have successfully taken steps to equip their businesses for the tough trading conditions.

Recent 'Retail Winners' where like-for-like sales show a healthy improvement include the following retailers: Debenhams, House of Fraser, Marks and Spencer, Laura Ashley, Asos, Primark, Ted Baker, Moss Bros, Next, Mulberry, Clinton Cards, JD Sports, Topps Tiles, B&Q, Carpetright, Halfords, Hotel Chocolat, Wm Morrison, Tesco, J Sainsbury, and Co-operative Group. Retailers which have experienced a decrease in like-for-like sales include: JJB sports, WH Smith, Mothercare, Home Retail Group, Dunelm Mill and Thorntons. Recent administrations and closures include branded fashion retailer Envy; the value chain Ethel Austin; the struggling 71 store group Suits You; and jewellery retailer Diamonds and Pearls.

In terms of retailers seeking expansion opportunities, it has been reported that Blacks Leisure has begun a store rollout programme; Hotel Chocolat, the chocolate specialist plans to open between 10 and 15 stores this year; Waitrose is reported to be in talks to buy the Eat sandwich chain as part of its ambitious expansion plans; 99p stores is looking to open more than 200 stores by 2014; and Agent Provocateur, the high class underwear retailer has announced plans to double in size to almost 100 stores in the next three years. New entrants to the retail market include J Crew, a US fashion retailer keen to launch an etail offer in the UK; and Ruby Tuesday, a US restaurant chain plans to open in the UK this summer with the first outlet in Cardiff and another four openings already in the planning stages.

In South Wales

Cardiff is Wales's dominant city. Newport despite its proximity to Cardiff, has remained a strong commercial centre and is benefitting from a renaissance driven by capital investment. Swansea remains Wales's second city and the dominant commercial centre for West Wales forming the focus for the largely rural hinterland to the north and west. Junction 43 of the M4 is an important link to towns such as Neath and Aberdare via the A465 whilst the western end of the M4, at junction 49 provides the nodal link to central Wales via the A438/A40 and West Wales via the A48.

The highlight of 2009 for South Wales was the opening of St David's 2 in Cardiff. The Land Securities/Capital Shopping Centres scheme boasts a £675 million investment in Cardiff city centre and comprises circa 967,000 sq ft (89,891 sq ft). The development also includes 300 luxury roof top apartments, 3000 car parking spaces, 21 catering outlets and a state of the art Central Library comprising 5,109 sq m (55,000 sq ft). The scheme that opened in Autumn 2009 is anticipated to attract more than £250 million of new spending to Cardiff every year and establish Cardiff as one of the top retail destinations in Europe. Despite opening during the recession, the centre has been well received by both shoppers and retailers with early trading figures holding up well.

Newport has an exciting year ahead with the 2010 Ryder Cup at The Celtic Manor in October. The Welsh Assembly Government and Newport City Council are working on an ambitious programme to regenerate and revitalise the City of Newport. In the next ten years, Newport will undergo one of the greatest transformations of any UK City. The redevelopment will focus on three areas: Central area – city centre retail re-development; East Newport – a new community development to include 5,000 homes and local facilities and West Newport - building on the success of Newport West Business Parks. The scaling down of the redevelopment of Newport city centre was an unfortunate result of the credit crunch, however the university development on the waterfront is ensuring momentum of regeneration.

Swansea has continued progress with the SA1 redevelopment, the mixed use regeneration of the East Docklands expected to comprise over £200m of investment over the next 10-15 years. However, delays with the regeneration of the city centre, which comprises delivery of a mixed use scheme that will create a step change in the retail offer, continue due to the economic climate.

The view from the retail sector is that 2010 will continue to see transactions taking place as there is a level of occupier demand, however requirements are now more selective and opportunistic. As mentioned previously, Cardiff saw the completion of St David's 2 in 2009 and this is anchored by the first John Lewis Wales, and also the largest outside of London. Other occupiers in the scheme include: Karen Millen, Coast, H&M and Cult in addition to some upmarket fashion retailers such as Hugo Boss, Reiss, All Saints, Kurt Geiger, Molton Brown, L.K.Bennett and White Stuff.

Retail yields have moved out significantly, however the latter part of 2009 saw demand returning for prime assets evidenced by Royal London selling their holding on The Hayes in Cardiff for sub 6%. Occupiers have seen similar trends as in rest of UK, with headline rents under pressure and landlords granting more incentives to attract or retain tenants. Nevertheless, fewer retailers have gone into administration than some predicted so potentially the toughest times are now in the past. In terms of out of town retail, the outward movement of yields on retail parks was particularly rapid, although by the end of the year open A1 warehousing was again proving popular with investors and yields were moving back towards 7%.

In Ebbw Vale

Ebbw Vale town centre is linear in shape, running predominantly in a north/south direction along Bethcar Street.

There is a mix of historic and modern buildings in the town centre, however most retail units are small in size. The larger more modern units with dedicated servicing areas are sited at 'The Walk' shopping centre and are occupied by occupiers including Argos and Iceland. The town currently offers a range of shops in the town centre. National occupiers include Boots, Pound Stretcher, Argos, New Look, Peacocks and Shoe Zone. Notable absences include Marks and Spencer (although it is noted that an M&S outlet store has recently opened at Festival Park), Primark, River Island, national mobile phone stores, HMV, Superdrug and Next. There are also a number of independent retailers. The main convenience shops in the town centre are Iceland and Aldi both of which are at The Walk and have good car parking provision. The Kwik Save on James Street (670 sq m/ 7,212 sq ft) has closed and is now occupied by B&M.

The number of vacant units reported in the town centre is relatively high. CACI previously reported 8 vacant units and Goad, 15 vacant units. A site visit has identified additional vacant units that include Motor World and Card Warehouse. Vacancies seem to be higher at the southern end of Bethcar Street and the site visits suggests that this is due to lower footfall, and less appealing physical environment.

Retail rents in Ebbw Vale town centre have remained static at £323 per sq m (£30 per sq ft) since June 2006.

Apart from a library, bingo hall and a number of cafes, there is a lack of diversity of other uses in the town centre. Urban realm improvements have undoubtedly helped maintain the town centre, but further investment is needed to help improve the physical environment and increase footfall. In addition, improving shopping range and ensuring there is a number of modern quality retail uses, will be important to help revitalise the existing retail offer.

The retail sector has a dynamic and extremely competitive nature and as such a proactive approach is required to encourage retail investment in the town centre of Ebbw Vale. Retail investment is largely provided by the private sector and therefore there are key messages to promote in terms of encouraging retail activity:

- Creating the right environment for investment
- Planning for and stimulating new development of a critical mass

- Managing and promoting retail centres
- Providing better access to information and advice

The key message is to bring forward a development site that could accommodate an anchor store which should help to attract shoppers and other retailers to the town centre. By having a readily available development site it would create the right environment for investment which should help to kick start the regeneration of the town. This approach would contribute to achieving the objectives of the BGCBC Local Development Plan and Ebbw Valley HARP and addressing some of the current socio-economic issues of Ebbw Vale.

4. Leisure

Over the last few years, it has been recognised that the leisure offer of a town is considered to be almost equally as important as the retail offer of a location in terms of creating the 'experience' required by increasingly demanding shoppers and visitors. The leisure market is made up of a diverse range of sectors, which have experienced mixed fortunes over the last 5 to 10 years.

Consumer spending on leisure and rental growth on leisure assets has been more resilient in the downturn than in other asset classes. Consumer spending on leisure continues to be less volatile than many other categories of consumer spending. Due to the uncertainty in the UK economy and the anticipated changes in the public sector, a boom in spending on leisure services is not anticipated between 2010 and 2013. Nevertheless, modest growth is predicted which will provide a platform for growth for successful operators.

Cinemas

It is estimated that there are approximately 325 multiplexes in the UK, with approximately 3,600 schemes. 70% of this representation is situated on leisure parks/schemes, 10% in pure retail environments and the rest are standalone or without any direct retail/leisure link. The pace of expansion has dropped from its peak of 1998 to 2001 when 100 new sites opened in four years, however encouraged by growing attendances, new technology, and a ready supply of sites (mainly in shopping centres) this has driven generic expansion up to the end of 2009.

There is considered to be two generations of multiplex cinemas. The first generation cinemas were built between 1985 and 1995. They range between approximately 2,323 sq. m. – 3,717 sq. m. and were generally developed out-of-town in areas with a catchment population of 250,000 within a 20-minute drive time. The second generation of cinemas were built from 1995 onwards and range in size between approximately 3,252 sq. m. and 6,506 sq. m. These are generally located in town or in edge of town locations with a catchment population of 100-150,000 within a 20-minute drive time and form part of a wider redevelopment area.

Cinemas are generally not commercially viable in their own right and rely on income from the ancillary functions to make the business viable. Cinemas tend to contain a range of ancillary functions including eating and drinking facilities and retail outlets. It is estimated that 20% of turnover is generated from food and drink, accounting for 60% of profit.

The key features of Cinema's operations are:

- Minimum leases of 20 years: long leases are fairly typical for cinema operators;

- Cinema's are a key footfall driver - the average 8 screen cinema will expect to achieve a minimum of 400,000 admissions per annum;

- Typically 'affordable rents' i.e. pegged to a market level and/ or performance;

- Typically fixed increases or index linked rent reviews (usually 2.5% per annum compound or RPI linked);

- Relatively generic properties are sought so that in the event of corporate failure, other operators are likely to take over the lease.

Only one operator is seen as institutional grade, which is Cineworld plc which is now listed on the London Stock Exchange. The other main operators in the UK are VUE, Odeon, Empire and Showcase and are privately owned companies which have grown fairly rapidly over the last 10 years through leveraged private equity plays.

Ebbw Vale currently does not have a cinema but there are a number of cinemas within 20 minutes drive time including 8 screen Vue multiplex cinemas at Merthyr and Cwmbran and the Market Hall in Brynmawr (1-screen). Given the desire for Ebbw Vale to be a Principal Hub, a cinema and associated commercial leisure facilities should remain a long term ambition for the development of Ebbw Vale. It is recognised that there is unlikely to be sufficient space within the town centre for such a facility and therefore a suitable location within the northern corridor with effective access links to the Town centre should be identified. Such a facility would also have the advantage of being an additional draw to Ebbw Vale.

Restaurants

Whilst to date, the restaurant sector does not appear to have been hit as hard as the public house sector, trading is now showing signs of slowing which is reflected by the amount of promotions and offers being marketed by most of the large fast casual dining chains. Whilst this collective campaign is keeping competition fierce, this is relatively aggressive discounting and is perhaps more of an indication of how the sector is trading than anything else. Restaurants are now an important and valued part of the shopping experience. The catering offer is considered increasingly important in improving dwell time, but the mix of restaurants has to be right.

As highlighted above, the leisure offer in Ebbw Vale town centre is very limited and the so called cafe culture has not developed in Ebbw Vale town centre like many towns and cities around the UK. Improving the leisure offer of the town centre will be important in helping to regenerate the town centre with such facilities helping to increase people's dwell times in town and city centres.

Hotels

The hotel sector has changed dramatically over the two decades. There has been a significant reduction in the number of hotels, as many older and smaller facilities have closed due to competition from larger hotels offering better facilities.

During 2007, the first half of the year experienced robust transactional activity, whilst there was a notable slow down during the second half of the year and 2008. After a difficult 2009, the UK hotel market is expected to bounce back in 2010 proving more resilient to the economic downturn than other areas of the commercial property market. Mid-range brand hotels suffered mostly during 2008 and 2009, and in 2010 investment is expected to focus on the growing and successful budget hotel sector.

The provision of accommodation within Ebbw Vale is limited. A Premium Travel Inn is located at Victoria Business Park in Waunlwyd situated close to Ebbw Vale Train Station and within 1.6km (1 mile) of the town centre. This hotel offers 44 rooms and has an on-site Brewers Fayre restaurant. A search of hotel accommodation in Ebbw Vale reveals one other guest house in Ebbw Vale which provides 12 bedrooms. There are a number of hotels located around Ebbw Vale including the Bear at Crickhowell (approximately 14.4 km/9 miles from Ebbw Vale) and Ye Old Red Lion Hotel, Tredegar (approximately 5.5km/3.5 miles from Ebbw Vale).

Leisure in Ebbw Vale

The commercial leisure offering of Ebbw Vale is in need of improvement. The presence of a cinema in the town would significantly enhance the leisure offer. However, it should be considered a longer term aspiration so the commercial viability of such a facility can benefit from wider proposals in the area to increase the residential and employment numbers in this principal hub location.

In terms of accommodation the offer is somewhat limited. If hotel space could be brought forward in the town and/or on the major arterial routes (such as the A465 Heads of the Valleys improvement) it would enhance the business offer of the town and the potential tourist visits to stay in this area, whilst visiting the wider area, such as the Brecon Beacons.

Based on a review of the other commercial leisure parks, a site of no more than 4 hectares should be set aside within the overall development framework for the area.

5. Offices

The UK Office Market

Many regional markets have experienced a slowdown in market activity with aggregate regional take –up decreasing slightly at the start of 2010. Transaction activity in Quarter 1 continued to be attributable mainly to upgrades and/or consolidation in connection with upcoming lease events. The nature of this demand is very specific, depending on the actions of individual tenants so it is difficult to identify a clear trend as regards to business sectors.

Regional office availability was essentially unchanged in Quarter 1 after increasing 55% over 2008-2009. The end of the regional pipeline has effectively been reached. There were some returns of space in Quarter 1 as part of relocations and/or consolidations as tenants took advantage of market conditions to upgrade to better-specified and more efficient accommodation. However, the return of unwanted 'grey' space has generally slowed across most regional markets as business conditions stabilise and the majority of staff rationalisation plans have finished. The underuse of space still remains commonplace across most sectors.

The public sector accounted for many of the largest regional office leasing transactions in 2009. This is expected to fall back in 2010 given the fulfilment of these large requirements, allied with public sector budget constraints.

DTZ predict headline rents to remain flat for almost all regional markets for the remainder of 2010 and for many in 2011 also. As grade A space is absorbed, any changes to the overall occupier cost is likely to come as landlords firm up their views on the generous incentive packages and short lease lengths in place.

South Wales

Cardiff is the main focus of the South Wales office market. Despite the economic conditions, city centre Grade A offices held up well last year with headline rents remaining around the £20 psf mark. Prime yields in Cardiff moved out to circa 8% in 2009, however towards the end of last year an improvement in yield profile was seen as more overseas funds were actively looking at Cardiff as an investment option. Yields in out of town and less established locations experienced a shift out towards double figures.

With the public sector occupying a good percentage of office stock in South Wales, over-supply is not considered to be a major issue. The Government's objective of sustaining and enhancing the vitality, attractiveness and viability of town centres is complemented by advice to encourage the diversification of uses within the town centre as a whole.

Ebbw Vale

Blaenau Gwent's economy is dominated by manufacturing and 'other services'. Other sectors such as distribution and banking are weak resulting in a limited range of job opportunities. Ebbw Vale is not a recognised office location and the town centre offers no purpose built commercial office blocks. Office accommodation generally tends to be provided above shops and caters predominantly for local professional organisations and firms. The local authority is the main office occupier in Ebbw Vale.

Developing office space in the town centre will help to bring people into the town centre increasing the spending potential of the town centre with employees potentially spending money at lunchtime and by undertaking top up shopping. Promoting office development in the town centre is very much in-line with planning policy which promotes town and city centres as the preferred location for office development.

Office development is being promoted as part of the regeneration scheme for the Works site. It is important that in order to ensure the maximum benefit to the town centre, the high quality linkages proposed are implemented to encourage potential employees to use the town centre at lunch time and to carry out top up shopping. To encourage this it is also important to ensure that the correct retail and facilities are on offer in the town centre and that completing facilities are not available on The Works site.

Demand for office space is likely to be generated from indigenous businesses/services who would like to upgrade their accommodation in close proximity to their existing premises or to buy their accommodation outright. Demand is likely to be focused on small to medium scale units which range in size between 325 – 650 sq m (3,498 – 6,996 sq ft) in a pavilion style for rent and units around 232 sq m (2,500 sq ft) to buy. Such provision should form part of the consideration for sites surrounding the town centre.

6. Industrial

The nature of employment and therefore the need for employment land has changed greatly over the last 30 to 40 years. Back in the 1960's/70's there was a high dependency on traditional industries of coal, steel and quarrying which have all declined significantly since. These jobs have been replaced by a broader base of modern manufacturing and services, with differing employment land requirements. During the 1980's the UK experienced large scale inward investment projects such as Sony at Bridgend, LG in Newport and Usher Batteries in Blaenau Gwent. However, these have declined significantly and the chance of attracting such projects to the UK is considered to be marginal due to much cheaper labour in Eastern Europe and other parts of the world. During the 1990's the distribution sector was a key drive of demand for employment land driven largely by the growth in the retail sector.

Generally during the late 1990's and early 2000's the industrial sector experienced difficulties, with manufacturing jobs continually shed, with sharp declines in employment noticed in all regions including Wales and Blaenau Gwent. Job prospects for the future are similarly downbeat, with a sharp contraction forecast for Wales. The performance of the industrial property market is directly linked to the performance of industry and over recent years it has reflected the recession in manufacturing and industrial output overall which has led to large volume of employment premises being available to let.

During late 2008, the commercial property market was hit by the first value declines in 15 years. The rapid deterioration in the economic environment for industrial occupiers has led to an increase in the level of vacant space coming to the market at a time when availability was in any case elevated, having risen throughout the boom period. A major issue is the suitability of available space to meet the demands of modern occupiers, with large, dated units accounting for a significant proportion of the vacant stock. Retailers accounted for 45.7% of the total floorspace taken-up during 2008. Food retailers accounted for 26.4% of the total and non-food retailers for 19.3%. Manufacturing companies accounted for 10.7% of take-up whilst third party logistics providers took a 29.7% share. The remaining 13.9% was accounted for by occupiers in 'other' sectors.

The industrial market in South Wales has largely followed national trends. The availability of industrial accommodation in South Wales has risen considerably, with several large high profile closures of manufacturing facilities having been announced, these have included Cosi Budlepak, Hoover, Novelis and TT Group. Not only has this had a detrimental effect on confidence and demand in the manufacturing sector, it has significantly increased supply.

The employment market in Ebbw Vale is dominated by the manufacturing sector. Rassau and Waun Y Pound industrial estates and Crown Business Park provide the main employment areas in the town. The largest employer in the town is based on Rassau Industrial Estate, namely Shorewood E P C Europe Ltd. Currently there are a number of vacancies on these industrial estates including 16,722 sq m (180,000 sq ft) at the Tech Board Premises. Rhyd y Blew has been an employment land allocation for a significant length of time but to date the number of enquiries received in relation to the site has been limited. According to the Draft Preferred Strategy Employment Background Paper, (November 2008) traditional B Class jobs will drop by 3,000 jobs between 2006 and 2021 in Blaenau Gwent.

Over recent years, indigenous companies have dominated market activity, and there has been very little inward investment. Demand remains stable for small start up units of up to 186 sq m (2,000 sq ft), especailly where they can be rented on a cost per week basis rather than cost per sq ft. This demand is generally driven by indigenous businesses. Going forward small medium to high quality units need to be provided, which generally suit the needs of start up companies or indigenous businesses which wish to expand.

The Local Development Plan – Draft Deposit Plan– September 2010 identifies that the main aim for employment is to:

"…increase employment opportunities and diversify the economy. Fundamental to delivering economic success is to ensure an appropriate range and mix of high quality employment sites that can support emerging employment needs. New employment allocations are concentrated in the Ebbw Vale area (85%). A further challenge for the area is low education attainment and lack of skills. The new Learning Zone planned for 'The Works' site will play a key part in addressing this challenge..

The key target is that by 2021:

employment and economic activity rates will have increased and unemployment decreased with levels nearer national averages. This has been achieved by diversifying the economic base into construction, business services, health and social care, tourism and leisure and environmental industries, whilst supporting the manufacturing sector.

To support this aim it is identified that 85% of employment land required over the LDP period should be within Ebbw Vale. The plan also identifies that there should be a greater emphasis on town centre employment sites with existing sites being de-allocated and new mixed used sites close to town centres being identified. A further aspiration of the LDP is to create a successful tourism and leisure sector based around the natural and historical assets of the county Borough, the Valleys Regional Park concept and the gateway role Blaenau Gwent can play in terms of access to nearby regional attractions.

In relation to the provision of industrial employment space, it is noted that Rhyd y Blew remains a site of strategic importance. It has good access to the road network and will be well placed to benefit from the A465 Heads of the Valleys improvements. The site should remain a key employment area. However, future development of the site should consider flexibility in terms of the space allocations and unit sizes to support the evolving industrial market.

7. Residential Market

General Overview

2009 has been described as the ‘year of surprises’. The unexpected growth in house prices at the UK level in 2009 can be attributed to five key factors:

- A thin market, with transactions focussed on quality areas and quality homes;
- New patterns of household income distribution and tenure;
- Confidence among well off buyers that the market had reached bottom;
- A lower level of unemployment and a more robust growth in earnings than expected;
- A constrained supply of ‘distressed’ property making its way onto the market.

DTZ anticipates that the market will stall in 2010 achieving modest nominal house price growth of 2.3% over the year, a pattern that will be reflected in some months of price growth and others of falls or zero growth.

DTZ predicts that volumes will grow modestly over the year, but remain at levels of activity that are substantially below historic levels. The market remains thin by historic standards and therefore susceptible to relatively small changes in the supply-demand balance. This growth in volumes will be aided by gradual growth in mortgage volumes, but without a return to historic levels. This provides a modest boost to demand, and allows some of the pent up demand to be released. More property will be released onto the market by people who have clung on for a number of months finding they can no longer do so. In summary, the expectation in terms of UK house prices for 2010 is a weak but balanced market.

A nominal increase in prices of 2.3% across the UK represents almost stable real house prices. But the experience across the UK and by property type in this thin market, is likely to vary considerably by region, by locality and by property type.

South Wales

Following the national trend, house building activity in South Wales has been very limited over the last 12 months, with house builders reluctant to commence new developments. Before the credit crunch due to land shortages along the M4 in South Wales, house builders had become more active at locations in the valleys during the last 5 years, particularly locations that are easily accessible to the main north south commuter corridors. However, the impact of the credit crunch has been most dramatic in these areas as you move further away from the M4 and main arterial routes.

However, during the last 12 months whilst national house prices have fallen by 16.2%, house prices in Wales have only fallen by 12.8%.During this same period in Blaenau Gwent house prices have fallen by 15.7% and the average house price currently stands at £78,300.

Ebbw Vale

During the housing market boom, house builders have developed a range of housing sites in Ebbw Vale including Redrow Homes developing on the Garden Festival Site. However, activity is very limited at the present time and a search of Right Move indicates that Redrow is the only Plc house builder currently active in Ebbw Vale with their development adjacent to the former Steelworks site. One bed apartments are currently on the market for just under £90,000.

Land values in Ebbw Vale currently stand at between £200 - £250k net developable area. This is based on a 'clean' site with no abnormal or significant infrastructure requirements, public open space, ecology etc and on the basis of the units being constructed to a Code Level 3 specification.

The LDP process has identified a need for 4000 new houses in Ebbw Vale. In relation to the principal hub status afforded to Ebbw Vale it is important that a sufficient number of these properties are provided within Ebbw Vale. In order to gain the most regenerative value from these residential properties they should be located in or close to the town centre in order to provide increased capacity to sustain and regenerate the town centre facilities. To capitalise on this capacity effect, it is important for the new residents to use the town centre from the outset. Therefore, it is important that the town centre provides the 'experience' required by residents in terms of facilities and access.

8. Summary and Recommendation

To summarise, from a commercial market view there is certainly scope for improvement in Ebbw Vale. The key points to consider in relation to how improvements can be made are examined below:

- **Leisure offer**– the existing commercial leisure offer in Ebbw Vale is limited. Over the last few years, it has been recognised that the leisure offer of a town is considered to be almost equally as important as the retail offer of a location in terms of creating the 'experience' required by increasingly demanding shoppers and visitors. Leisure is a core function of a 'Town' and contributes significantly to a town centre's success. An improvement in the leisure offer of Ebbw Vale would compliment other key functions of the town such as Shopping, thereby increasing the time spent by shoppers in the town and contributing to a positive shopping experience.

  Given the desire for Ebbw Vale to be a Principal Hub, a cinema and associated commercial leisure facilities should remain a long term ambition. It is recognised that there is unlikely to be sufficient space within the town centre for such a facility and therefore a suitable location within the northern corridor with effective access links to the Town centre should be identified. Such a facility would also have the advantage of being an additional draw to Ebbw Vale to both new residents and visitors alike.

  The level of provision of hotel accommodation in Ebbw Vale could also be improved, as the existing offer is limited to one premier travel inn located close to the train station, and a couple of guest houses. If hotel space could be brought forward in the town and/or on the major arterial routes (such as the A465 Heads of the Valleys improvement) it would enhance the business offer of the town and the potential tourist visits to stay in this area, whilst visiting the wider area, such as the Brecon Beacons. An aspiration of the LDP is to create a successful tourism and leisure sector based around the natural and historical assets of the County Borough, the Valleys Regional Park concept and the gateway role Blaenau Gwent can play in terms of access to nearby regional attractions. Therefore, taking account of future growth opportunities in the tourism and leisure sector, an increase in the provision of accommodation in Ebbw Vale is justified.

From a commercial market perspective, the UK hotel market is expected to bounce back in 2010 proving more resilient to the economic downturn than other areas of the commercial property market. Mid-range brand hotels suffered mostly during 2008 and 2009, and in 2010 investment is expected to focus on the growing and successful budget hotel sector.

Consumer spending on leisure continues to be less volatile than many other categories of consumer spending, and while this sector is not forecast to grow significantly in the next few years, modest growth is anticipated which will provide a platform for growth for successful operators.

- **Diversity of uses –** Apart from a library, bingo hall and a number of cafes, there is a lack of diversity of other uses in the town centre. If addressed, there is potential to significantly enhance the appeal and image of the town and help to stimulate the number of visitors to the area.

  In the town centre, urban realm improvements have undoubtedly helped maintain the area, but further investment is needed to help improve the physical environment and increase footfall in the town centre. The introduction of office space, aswell as the hospital and college, will add another dimension to the town centre, increasing footfall in the town and boosting consumer spend.

- **Retail investment -** improving the shopping range and ensuring there is a number of modern quality retail uses, will be important to help revitalise the existing retail offer. The level of vacancies in the town centre are relatively high, with the most vacancies at the southern end of Bethcar Street which is most likely due to the lower footfall in this area.

  The retail sector has a dynamic and extremely competitive nature and as such a proactive approach is required to encourage retail investment in the town centre of Ebbw Vale. Retail investment is largely provided by the private sector and therefore there are key messages to promote in terms of encouraging retail activity:

  - Creating the right environment for investment
  - Planning for and stimulating new development of a critical mass
  - Managing and promoting retail centres
  - Providing better access to information and advice

  The key message is to bring forward a development site that could accommodate an anchor store which should help to attract shoppers and other retailers to the town centre. By having a readily available development site it would create the right environment for investment which should help to kick start the regeneration of the town. This approach would contribute to achieving the objectives of the BGCBC Local Development Plan and Ebbw Valley HARP and addressing some of the current socio-economic issues of Ebbw Vale.

  The view from the retail sector is that 2010 will continue to see transactions taking place as there is a level of occupier demand; however requirements are now more selective and opportunistic. By having a readily available development site it would create the right environment for investment which should help to kick start the regeneration of the town.

- **Residential development -** Following the national trend, house building activity in South Wales has been limited recently, with house builders reluctant to commence new developments. During the last 12 months whilst national house prices have fallen by 16.2%, house prices in Wales have only fallen by 12.8%. During this same period in Blaenau Gwent, house prices have fallen by 15.7% and the average house price currently stands at £78,300.

  Land values in Ebbw Vale currently stand at between £200 - £250k net developable area. This is based on a ‘clean’ site with no abnormal or significant infrastructure requirements, public open space, ecology etc and on the basis of the units being constructed to a Code Level 3 specification.

  In terms of supply, we are aware of two affordable housing schemes in Ebbw Vale recently committed; 1) a Lync Cymru scheme and 2) Melin homes have a circa 80 unit scheme. In addition, it is important to bear in mind that 500 homes form part of the Masterplan for The Works site and the timing of delivery for this has the potential to significantly alter the residential supply pipeline.

- **Employment uses -** The employment market in Ebbw Vale is dominated by the manufacturing and ‘other services’ sector. Rassau and Waun Y Pound industrial estates and Crown Business Park provide the main employment areas in the town and the Local Authority is the main office occupier of the town.

  Office development is being promoted as part of the regeneration scheme for the Works site. It is important that in order to ensure the maximum benefit to the town centre, the high quality linkages proposed are implemented to encourage potential employees to use the town centre at lunch time and to carry out top up shopping. To encourage this it is also important to ensure that the correct retail and facilities are on offer in the town centre and that competing facilities are not available on The Works site.

  Demand for office space is likely to be generated from indigenous businesses/services who would like to upgrade their accommodation in close proximity to their existing premises or to buy their accommodation outright. Demand is likely to be focused on small to medium scale units which range in size between 325 – 650 sq m (3,498 – 6,996 sq ft) in a pavilion style for rent and units around 232 sq m (2,500 sq ft) to buy. Such provision should form part of the consideration for sites surrounding the town centre.

  In terms of the Industrial sector, over recent years indigenous companies have dominated market activity, and there has been very little inward investment. Demand remains stable for small start up units of up to 186 sq m (2,000 sq ft), especially where they can be rented on a cost per week basis rather than cost per sq ft. This demand is generally driven by indigenous businesses. Going forward, small medium to high quality units need to be provided, which generally suit the needs of start up companies or indigenous businesses which wish to expand. In relation to the provision of industrial employment space, it is noted that Rhyd y Blew remains a site of strategic importance. It has good access to the road network and will be well placed to benefit from the A465 Heads of the Valleys improvements. The site should remain a key employment area. However, future development of the site should consider flexibility in terms of the space allocations and unit sizes to support the evolving industrial market.

Annex C

Regional and Local Socio-Economic Characteristics

1 REGIONAL AND LOCAL SOCIO ECONOMIC CHARACTERISTICS

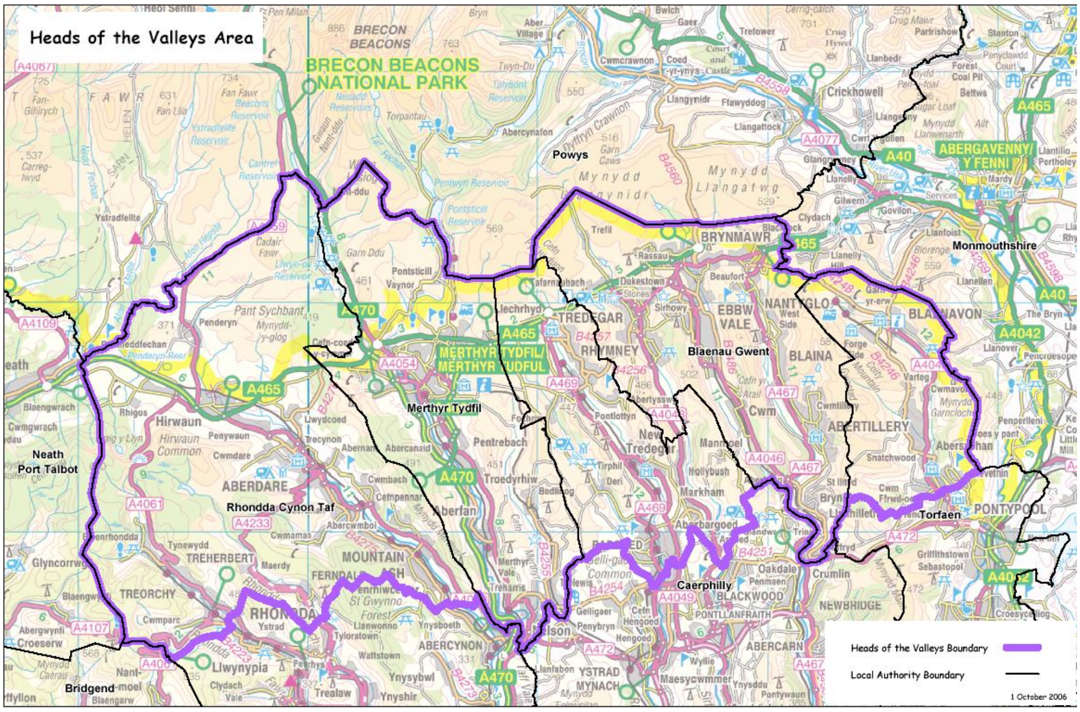
1.1 INTRODUCTION

This section provides a summary of the socio-economic conditions in Ebbw Vale and the surrounding areas. The purpose of this section is to highlight the key social issues which the Ebbw Vale Sustainable Development Framework aims to address within the broader Heads of the Valleys regeneration and local regeneration context.

1.2 OVERVIEW

The Heads of the Valley area reflects regional and local government boundaries. As shown in *Figure 1.1*, this area encompasses the whole of Blaenau Gwent and Methyr Tydfil, and the northern areas of Rhondda Cynon Taf, Caerphilly, and Torfaen.

Figure 1.1 Heads of the Valleys Area



Source: http://wales.gov.uk

The Heads of the Valleys is a defined area for the purpose of regeneration. Economic and social indices suggest that the Heads of the Valleys is an underperforming area of Wales; in turn, Wales has lower social and economic indicators than England. Ebbw Vale lies within the Heads of the Valleys in Blaenau Gwent County.

1.2.1 *Population*

Based on information collected during the 2001 Census, 8,944 people live in Ebbw Vale. Approximately 58 % of Ebbw Vale's population falls within the

16-59 age groups. The proportion of the resident population in the 16-29 age band in Ebbw Vale is also similar to averages for Wales and England. Previous profiles have identified that between the 1991 and 2001 the population of Ebbw Vale declined by 4 %; in contrast, the population of Blaenau Gwent has grown by 3 %. An analysis of population change by age bands reveals that 20-29 age band shows the greatest reduction. Decline within this age group in Blaenau Gwent is consistent with the rate in Wales and England, but the rate in Ebbw Vale is higher than the average. Furthermore, the 30-59 and 75+ age bands have grown at a higher rate than the Welsh average; leaving Ebbw Vale with an ageing and decreasing population, resulting in a shrinking workforce.

Despite the growth trend in Blaenau Gwent, one issue facing the Heads of the Valleys is the loss of population from the area. In the 26 years to 2007, the Heads of the Valleys population fell by more than 9 %. Between 1981 and 2001, half of the decline was accounted for by people of working age moving out of the area – in many cases probably to the Lower Valleys or other parts of the region. As with the rest of Wales, the Heads of the Valleys experienced a reduction in the child population during the 1980s, accounting for nearly half the overall decline over that decade.

1.2.2 *Labour Supply and Unemployment*

Economic activity rates(1) (calculated as a percentage of the 16-74 age group of the resident population) in Ebbw Vale, particularly the southern ward, are higher than those for Blaenau Gwent. However, overall are lower than then average for England and Wales. Furthermore, unemployment rates in Blaenau Gwent and Ebbw Vale are higher than the averages for England and Wales.

In Blaenau Gwent in 2009 7.3% of the working age population claimed Job Seekers Allowance – the highest in Wales matching the high level of people also claiming incapacity benefit, income support and pensions credit in the county.

Just under 105,000 people living in the Heads of the Valleys are in employment; this represents 64 % of the working age population (2007). This is an employment rate 7 percentage points lower that the average for Wales as a whole.

While the unemployment rate in the Heads of the Valleys area is higher than average (8.0% in 2007 compared to 5.6% nationally), this does not account for the bulk of the employment rate gap. This is largely due to the high rate of economic inactivity in the area. Nearly a third of working age people resident

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(1) The economic activity information applies only to people aged 16 to 74. They relate to whether or not a person was working or looking for work in the week before the Census. The concept of Economic Activity is compatible with the International Labour organisation (ILO) definition of economic status.

in the Heads of the Valleys area are economically inactive (30.3%), compared to around a quarter (24.5%) for Wales as a whole.

The percentage of working age people who are inactive because of long term sickness or disability is higher in the Heads of the Valleys area than for Wales as a whole. In 2008, this category alone accounted for most of the difference in the economic inactivity rate between this region and Wales as a whole.

Income in Blaenau Gwent is also lower than neighbouring boroughs (1) with the mean income in Blaenau Gwent being £26,559 compared to £31,108 in SE Wales's and £30,231 for Wales as a whole affecting levels of disposable incomes. In 2008 Blaenau Gwent residents working in the borough had median Gross weekly pay was £370 compared to £421 for Wales as a whole.

The population data suggest that the potential available labour force in Ebbw Vale is reducing as the local population ages and shrinks. In addition, health figures indicate that the current population also suffers from higher than average rates of permanent/long-term illness or disability. The Local Labour Force Survey (2004) highlighted that those with a limiting long-term health problem were also more likely to be economically inactive in the Heads of the Valleys than elsewhere in Wales. These factors currently limit the potential size of the labour force in Ebbw Vale.

1.2.3 *Employment Structure*

Baseline assessments carried out for the regeneration phase of work for the steelworks site identified that the employment profile of Ebbw Vale is similar to that of Blaenau Gwent, with a focus of activity in distribution industries, public administration, education and health, and manufacturing. However, banking and insurance sectors declined significantly in Ebbw Vale between 1998 and 2002; transport and communication has grown by 51 % in Blaenau Gwent, but provides only 3 % of employment in Ebbw Vale and has declined by 21 % in the area between 1998 and 2002.

Ebbw Vale and Blaenau Gwent County Borough both perform weakly in terms of change in total employment. In the Ebbw Vale area this poor performance is influenced by a 26 % decrease in employment opportunities in the north ward between 1998 and 2002. In comparison, total employment in Ebbw Vale South has increased steadily by a marginal 3 % compared to 5 % for England and Wales.

In the Heads of the Valleys area manufacturing, a sector which has declined in recent years and is likely to continue to do so in the future, is over represented.

(1) Paycheck 2006 taken from Ebbw Fawr Valley Holistic Area Regeneration Plan (HARP) 2008.

1.2.4 *Commuting*

All of the valleys authorities experience net out-commuting, while other authorities in South East Wales (Newport and Cardiff in particular) have a substantial in-commuting flow.

1.2.5 *Car Ownership and Employment*

Around 76 % of working age people in the Heads of the Valleys area have the use of a car (2006). This represents a smaller percentage than in the rest of South East Wales and substantially smaller than elsewhere in Wales.

Working age people with the use of a car in the Heads of the Valleys area are more than twice as likely to be in employment than those without. The differences in the employment rates between the Heads of the Valleys area and elsewhere in Wales were similar for those with and without the use of a car.

1.2.6 *Skills and Training*

Previous profiles of Ebbw Vale have identified that the skills base of Ebbw Vale is relatively poor with more than 40 % of 16-74 year olds (a comparable figure to Blaenau Gwent County) with no qualifications compared to 29 % nationally. The previous assessment concluded that a lack of higher education facilities in the wider borough is a key reason for poor skill levels in Blaenau Gwent.

A review of employment numbers by occupation categories emphasises the poor skills base of Ebbw Vale and Blaenau Gwent. More than 60 % of employment in Ebbw Vale North, Ebbw Vale South and Blaenau Gwent is accounted for by low skilled jobs including administrative and secretarial, personal service, customer service, machine operatives and elementary occupations. In addition, there is a much lower proportion of employment in professional occupations, highlighting the lack of a knowledge driven employment base in Ebbw Vale and Blaenau Gwent. As mentioned above, Blaenau Gwent experiences relatively high levels of out-commuting, with many high-level earners not being employed in the area to work.

1.2.7 *Qualifications and Education*

The resident working age population in the Heads of the Valleys area is less well qualified than elsewhere in Wales, with a higher proportion with no qualifications and a lower proportion with NVQ level 4 or above.

Qualification levels in the Heads of the Valleys are lower than in Wales as a whole. While this is only a broad- brush analysis of qualification levels, the pattern is clear. Nearly one quarter of working age people in the Heads of the Valleys area have no qualifications, compared to one sixth in Wales as a whole.

The low level of qualifications is linked to economic inactivity, since those with higher qualifications are more likely to be in work – across Wales as a whole 85 % of graduates (NVQ level 4 or above) are in work compared with only 47 % of those without qualifications. It is also linked to poverty, since someone with 5 GCSEs at grades A*-C will earn on average 38 % more than someone without qualifications.

Educational achievement in Heads of the Valleys schools is also lagging, with only 48.8 % of 15 year olds achieving 5 GCSEs at A-C* grades, compared to a Welsh average of 58 % in 2007/2008. The University of Glamorgan College opened in May 2006 in Merthyr Tydfil and the further/higher education 'learning zone' college campus at The Works Ebbw Vale is currently progressing through the planning process.

Education levels in Heads of the Valleys are consistently lower than in Wales as a whole, from Key Stage 1 onwards. The low level of qualifications is linked to economic inactivity, since those with higher qualifications are more likely to be in work. Across Wales as a whole, 85 % of graduates (NVQ Level 4 or above) are in work, compared to only 47 % of those without qualifications. It is also linked to poverty, since somebody with 5 GCSEs at Grades A-C will earn on average 38 % more than someone without qualifications.

1.2.8 Deprivation

The Welsh Index of Multiple Deprivation 2008 (WIMD) is the official measure of deprivation for small areas in Wales. It uses a range of information across a number of subject domains covering: income; employment; health; education;; housing; access to services; environment and community services. The index is a measure of deprivation at the Lower Level Super Output Area (LSOA) level, an area designed for the collection and publication of small area statistics. Within Wales there are 1896 LSOA. People may be counted as being deprived in one or more of the domains, depending on the number of types of deprivation that they experience.

There are 190 Lower Level Super Output Areas (LSOA) in the most deprived ten percent in Wales for all deprivation measures. Cardiff (18%), Rhondda Cynon Taf (15%), and Swansea (10%), contained the highest percentage of the SOAs in the most deprived ten percent in Wales, for overall deprivation. Merthyr Tydfil (31%), Blaenau Gwent (21%), Neath Port Talbot (19%), and Rhondda Cynon Taf (18%) had the highest percentage of their SOAs in the most deprived ten percent in Wales, for overall deprivation.

Within the WIMD 2008 (as amended) of the 190 LSOA in Wales, Ebbw Vale North ranked 75th and Ebbw Vale South ranked 111th. Particular subject domains in which Ebbw Vale North and South showed high ranks included:
Income – Ebbw Vale North -77th
Employment – Ebbw Vale North 53rd, Ebbw Vale South 109th
Health – Ebbw Vale South 16th, Ebbw Vale North 156th

Education – Ebbw Vale North 105th , Ebbw Vale South 109th
Community Safety – Ebbw Vale South 189th

Ebbw North and South wards are both Communities First areas as a result of their high levels of deprivation as is the ward of Cwn which is also close to Ebbw Vale Town.

1.2.9 Health Conditions

A lower proportion of local residents in Blaenau Gwent and Ebbw Vale consider their health conditions as 'good' compared to the average for England and Wales; around 15 % of the population in the Ebbw Vale area believe their health is 'not good'. In addition, a higher proportion of the 16-74 age group in Ebbw Vale and Blaenau Gwent County are classified as 'permanently sick', 'disabled', or 'suffering from a long-term illness' than the England and Wales average.

Blaenau Gwent is the second worst performing local authority in Wales with regard to life expectancy for both men and women, and one of the worst performing for infant mortality.

Heads of the Valleys residents have less healthy lifestyles than elsewhere in Wales, with higher percentages of people smoking and drinking above recommended levels and having a higher level of those overweight or suffering from obesity.

1.2.10 Welsh Language

There has been a decline in the number of Welsh language speakers in Wales due to a variety of historical and current reasons. The proportion of people having no knowledge of Welsh in the Heads of the Valleys is higher than the Welsh average. The number of Welsh speakers is greatest in RCT and lowest in Blaenau Gwent. Although there is a long term decline in the Welsh language over the last 100 years, there has been a slight increase in recent years. The five local authorities making up the HoV area, have experienced an increase of up to 0.7 percentage points in the Welsh speaking population between 1991 and 2001 [(1)]. In total, however, the overall population speaking Welsh has declined in the last 100 years.

1 2001 Census data, available at: http://www.red4.co.uk/About%20Wales/lang-stats.htm, accessed 27/04/06

Annex D

Local Environmental Baseline

1 LOCAL ENVIRONMENTAL BASELINE

In order to properly inform development proposals a review of available environmental information has been undertaken. This has focused on the identification of potential environmental constraints to the proposed development of the site.

A summary graphic of potential constraints is identified in Figure 1. This draws together the following constraints:

- Ground conditions – identified through EnviroCheck survey
- Landscape and ecological designations – based on desk study and consultation with county ecologist
- Cultural Heritage Designations – based on consultation with county archaeologist
- Water Resources and Flood Risk – identified through EnviroCheck report and The Works development documents

Given that the Town Centre is developed and The Works is supported by a comprehensive set of environmental studies, our review has focussed on the Northern Corridor.

1.1 GROUND CONDITIONS

A review of the Envirocheck report has identified four main constraints in regards to ground conditions. Two historic landfills are identified within or adjacent to the Northern Corridor in the area immediately west of Glyncoed and the area currently occupied by the Waun-y-Pound Industrial Estate (Figure 1). During operation (1940's to 1970's), these landfills accepted deposited waste including inert, industrial, household and special waste. Remnants of these historic landfills potentially exist in the form of contaminated soils and volatile gases.

The central-western region of the Northern Corridor and a smaller region south of Glyncoed (Figure 1) have been identified as areas of potentially infilled land during the late 1980's for Pits and Quarries. The nature of the materials used for historic infilling are currently unknown, and may include contaminated soils.

The Northern Corridor is in an area of historic mining activity. Historic mining east of Glyncoed (Figure 7.1) during the late ninetieth century and early twentieth century has resulted in the presence of mining cavities including, scars, pits, shafts and mining entries. These formations and the aforementioned infilling have the potential for shallow ground instability.

In relation to the region's historic mining activity, the Envirocheck report has identified former mineral railways running north to south through the centre of the Northern Corridor and east to west adjacent to the northern boundary of the site (Figure 1). The former railways and their embankments are considered potential sources of contamination.

It is recognised that significant remediation activity has occurred on a number of the sites within the Northern Corridor over recent years and since the industrial use of the sites has changed. Therefore, it has been assumed that the majority of the sites are able to be successfully developed/redeveloped. However, it is recommended that where land use changes are likely to occur on areas of suspected contamination that suitable site investigation and remediation is undertaken.

1.2 LANDSCAPE AND ECOLOGICAL DESIGNATION

National statutorily protected nature conservation sites are provided for by the designation 'Site of Special Scientific Interest' (SSSI) under the Wildlife and Countryside Act 1981. Local authorities also have power to designate areas of localised nature conservation value as 'Local Nature Reserves' (LNRs). The area enjoys a good quality natural environment, with many landscape and biodiversity designations. Within Blaenau Gwent there are two SSSIs and 6 LNR, four of which were recently designated in June 2009 (* not shown on Figure 1).

Table 1.1 Conservation areas in Blaenau Gwent

Site	Designations	Comments
Silent Valley Woodlands	SSSI, LNR	Proximity to communities – good resource. Adjacent landfill site
Parc Bryn Bach	LNR	Blaenau Gwent owned reserve within country park– good facility and widely accessed by local community. Protected bird and rare floral species. focal for future outdoor recreational facilities
Parc Nant y Waun*	LNR	A valuable amenity area for local people with high wildlife value. plans to improve the educational resource for schools by creating an outdoor classroom/amphitheatre area
Sirhawy Hills Woodland and Cardiff Ponds*	LNR	The Reserve is valuable in terms of its biodiversity at a County level. The whole area is open to the public and there is a good network of paths
Cwmtillery Lakes*	LNR	Reclaimed site with high wildlife value
Beaufort Hills Ponds and Woodlands*	LNR	Reclaimed site with high wildlife value and an important resource for the local community

Site	Designations	Comments
Brynmawr Sections	SSSI	Geological interest. A465 dualling. Historic landscape

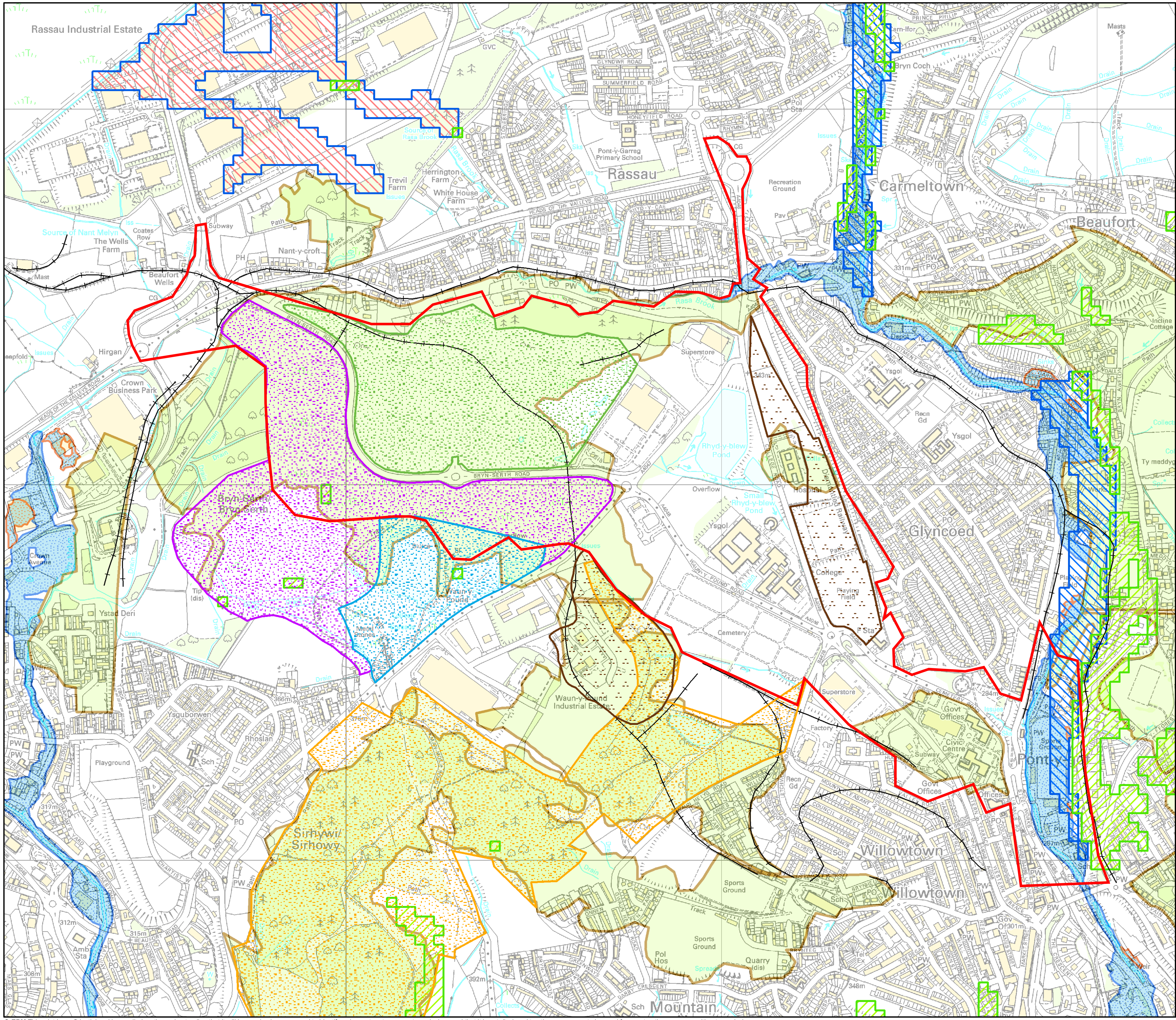
In addition, Brecon Beacons National Park (BBNP) was set up between 1951 and 1957 as one of the first ten National Parks. Its boundary crosses into the Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly and Blaenau Gwent Local Authority areas. The National Park is a protected area of spectacular landscape, which needs to be conserved and enhanced. Opportunities are also encouraged for public enjoyment of the park and the economic and social well being of communities living within the national park should be fostered.

European designated sites are provided for by the designation of Specials Areas of Conservation (SAC) and Special Protection Area (SPA). Within 10km of the study area are there is one European sites, a second European site is on the 10km boundary and is therefore reported below.

- Usk Bats SAC – which is approximately 3 km to the north east of the site and is designated as one of the best areas in the UK for lesser horseshoe bat. The Usk Valley area in south east Wales contains one of the largest maternity roosts for lesser horseshoe bats and important hibernacula in caves (not open to the public). The SAC also supports a range of Annex 1 habitats.
- Aberbargoed Grasslands – is over 10km from the study area. The main reason for its designation is the presence of a large and relatively isolated population of marsh fritillary butterfly (*Euphydryas aurinia*) on a series of damp pastures and heaths in Gwent, representing the species on the eastern edge of its range in Wales.

There are no nationally designated sites within the Framework area. However, the wider statutory designations are identified in Figure 2. There are three Sites of Interest for Nature Conservation (SINCs) within the Framework Area.

These sites are:
- Rhyd-y-blew,
- Sirhowy Hill Woodland and Cardiff Pond; and
- Waun y Pound



KEY:

- Site Boundary
- Historic Landfill
- Potentially Infilled Land
- Mineral Railway

SINC Site Name

- Bryn Serth
- Rhyd y blew
- Sirhowy Hill Woodland and Cardiff Pond
- Waun y Pound

Slope Instability

- Moderate

Compressibles

- Moderate
- High

Flood Type

- Flooding from rivers or sea
- Extreme flooding from rivers or sea

N / E / S / W

0 — 500 Metres

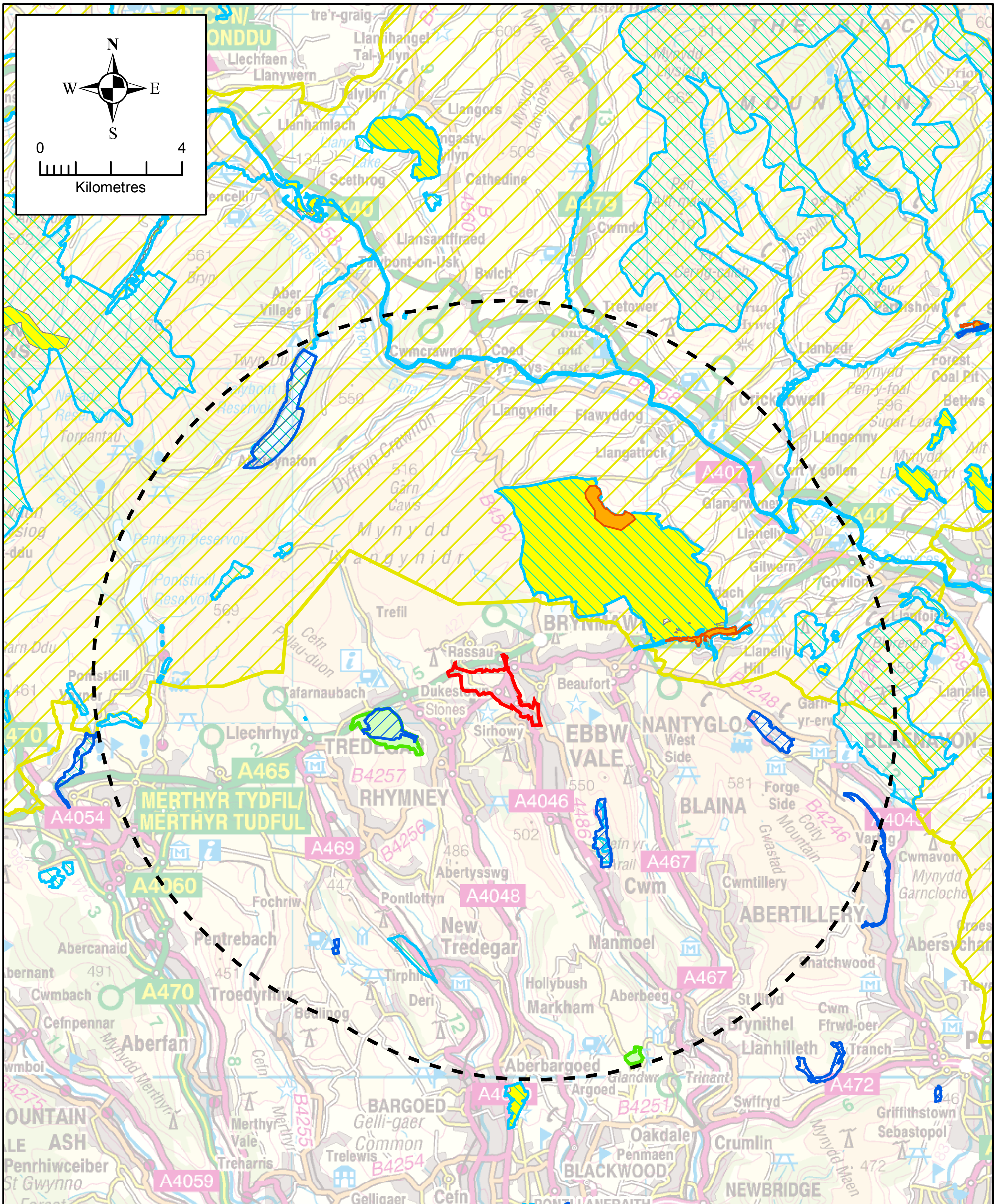
TITLE:

Figure 1: Site Layout Plan

CLIENT:		SIZE: A3
DATE: 15/05/2009	CHECKED:	PROJECT: 000000W
DRAWN: MTC	APPROVED:	SCALE: 1:10,000
DRAWING: EV_BaselineMap.mxd		REV: 0

ERM
Eaton House
Wallbrook Court
North Hinksey Lane
Oxford OX2 0QS
Telephone: 01865 384800
Facsimile: 01865 204982

PROJECTION: British National Grid



KEY:

- Site Boundary
- 10km Buffer
- LNR
- Country Park
- NNR
- SSSI
- SAC
- National Park

CLIENT:

SIZE: A4

TITLE: Figure 2: 10km Buffer & Ecology

Blaenau Gwent, Wales

ERM
Llandarcy House
11A The Courtyard
Llandarcy
Swansea Bay, SA10 6EJ
Tel: 01792 814907
Fax: 01792 817396

DATE: 15/05/2009	CHECKED: LC	PROJECT: 0098793
DRAWN: MTC	APPROVED:	SCALE: 1 = 150,000

PROJECTION: British National Grid

DRAWING: EV_10km_buffer_Ecoolgy.mxd

REV: 0

File: 0098793EbbwValeFrameworkGIS_MTC_SRMAPSIEV_10km_buffer_Ecoolgy.mxd

1.3 *CULTURAL HERITAGE DESIGNATIONS*

Blaenau Gwent has 13 Scheduled Ancient Monuments (SAM), 53 listed buildings, 2 conservation areas, 2 registered historic landscapes (which fall partially within its boundary) and 1 registered historic park and garden.

1.3.1 *Listed Buildings*

The majority of the designated sites identified in the Heads of the Valley region will not have a direct influence on the Northern Corridor or Town Centre areas. However, as identified in Figure 1 there are a number of listed buildings within or in close proximity to the study area. These are (from North to south):

1. Carmel Independent Chapel (BG 022)
2. Church House (BG 026)
3. Ebbw Vale War Memorial (BG 029)
4. Mount Pleasant Stores (BG 044)
5. Ebenezer Presbyterian Chapel (BG 030)
6. Newtown Bridge (BG 047)
7. Ebbw Vale Furnace Bank (BG 038)

There are no recorded listed structures within the Town Centre study area.

1.4 *WATER RESOURCES AND FLOOD RISK*

1.4.1 *Surface Water Features*

Overview

This section describes the surface water features and characteristics of Ebbw Vale and its surrounds. Firstly, in order to understand the water environment within Ebbw Vale in context, an overview of the regional catchment is provided.

Blaenau Gwent and the Ebbw and Lwyd Catchment

The landscape of the Blaenau Gwent area is typical of the South Wales Valleys, dominated by hills and high moorland plateau, intersected by three parallel narrow valleys of glacial origin, stretching north to south. To the west lies the Sirhowy Valley, beginning in the north beyond Trefil and extending down towards Blackwood. The Afon Sirhowy runs through the base of the valley. In the centre, lies the Ebbw Fawr Valley; otherwise referred to as Ebbw Vale or locally as the Western Valley. The Ebbw Fawr Valley begins in Rassau, descending through Ebbw Vale and Cwm, with the Afon Ebbw Fawr running in, and out, of culvert along the valley floor. To the east lies the Ebbw Fach Valley and Afon Ebbw Fach, this begins at Brynmawr, and encompasses Natyglo, Blaina, Abertillery and Six Bells.

The Afon Ebbw Fawr and Ebbw Fach meet at Aberbeeg to form the Glyn Ebbw, whilst the Sirhowy joins further downstream at Crosskeys. The watercourse at this point is referred to as the Afon Ebbw (or River Ebbw). The Afon Ebbw continues south, flowing into the River Usk as it joins the Severn Estuary at Newport. The Ebbw is tidal in their lower reaches. Like the Afon Ebbw Fawr, all the rivers in the catchment have been altered, culverted and channelled for parts of their length.

The Afon Ebbw Fawr and its Catchment

As introduced within the section above, The main watercourse within the Ebbw Fawr Valley is the Afon Ebbw Fawr. The river has a catchment within the and upstream of the Northern Corridor of approximately 21 km^2.

Land use within a catchment has a large influence on runoff, the types of abstractions and discharges made, and therefore upon water attenuation and quality. Land use within the catchment of the Afon Ebbw Fawr is dominated upstream by heathland and unimproved acid grassland, typically used for sheep grazing. Through Ebbw Vale, the catchment is more developed, with settlements located at Ebbw Vale (town), Garden City to the west of the site, Ty Llwyn to the east, and Victoria Business Park and Festival Park to the south. These settlements are, however, relatively small, and grazing lands and areas of marshland dominate the upper valley slopes.

The catchment is described as being 'flashy'[1], meaning that it has a rapid response to rainfall. This is considered to be due to three key factors, described below.

- ***Geology:*** the underlying coalfield deposits do not retain large quantities of water. Rainfall, surface tributaries and emerging springs therefore quickly convey waters to the Afon Ebbw Fawr. The nature of the geology also leads to the provision of low volumes of baseflow[2] to the river. This combination of factors results in the watercourse being almost exclusively fed by the rapidly conveyed surface runoff, making it more vulnerable and susceptible to low-flow conditions.

- ***Topography / Geomorphology:*** the steep sided nature of the glacial valley results in rapid surface water runoff during rainfall events.

- ***Development:*** the installation of drainage and water interception systems associated with development and the introduction of areas of hardstanding associated with settlements and industry further increase the rate at which drainage waters reach the valley floor.

(1) [1] Environment Agency Wales. (2006). *Ebbw and Lwyd Catchment Management Strategy*

(2) [2] Baseflow is the continual contribution of groundwater to rivers. It represents an important source of flow between rainfall events.

1.4.2 Flooding

As shown on Figure 1, the majority of the site falls outside the Environment Agency Wales' Indicative Floodplain. No records of significant flooding issues have been identified. However, due to the flashy nature of the catchment; flooding problems are experienced downstream, particularly south of the Afon Ebbw Fawr's confluence with the Afon Ebbw Fach.

Annex E

Stakeholder Consultation Summary

1 STAKEHOLDER CONSULTATION SUMMARY

In developing the proposals put forward in this Framework, development options and priorities have been tested with key stakeholders. A series of face to face meetings, presentations and telephone conversations have taken place. Those consulted fall into the following groups:

- Ebbw Vale Members
- Heads of the Valleys Team, Welsh Assembly Government (WAG)
- Key landowners, and their representatives
- WAG Property team
- WAG JESSICA funding team
- The Works project team
- The Works Environment Group
- BGCBC officers

This phase of consultation has not included the general public or detailed discussion with tenants and landowners regarding the individual arrangements on sites. Proposals for a comprehensive programme of public consultation on the recommendations of this study are being discussed with the client team.

Nevertheless, details of the consultation programme which supported The Works planning application are available and were taken into account in the preparation of this study (*The Works Consultation Report*, ERM, 2007). Although the following views were expressed in relation to The Works Masterplan, they are still considered to provide a useful body of information. In addition, a Shoppers Attitude Survey (Research and Marketing Plus 2008) and survey of Ebbw Vale Town Centre business undertaken between September and December 2007 were utilised:

Key views expressed as part of The Works consultation were:

Shopping and Retail Provision

- Several respondents said they were pleased a shopping complex was not included in the Masterplan as they thought this may damage the existing Ebbw Vale Town Centre.
- Some respondents suggested that the Masterplan should include more shops.

Residential Development

- The construction of good quality housing was seen as a critical factor for many stakeholders if people are to 'live and buy' in the area.
- One stakeholder stated that 'Homes for Life' guidelines should be built into the planning framework.

- Sufficient amenity space should be incorporated between the residential units.
- The general view was that new housing should blend in with the existing housing; one stakeholder summarised the appropriate approach as 'mix and match'.

Leisure Centre

- What will happen to the existing leisure centre?

Commercial Leisure/Entertainment Facilities

- Several respondents identified the need for more entertainment areas in the Masterplan.
- A cinema was most often identified by stakeholders as the leisure element missing from the Masterplan.
- One respondent commented 'we need to bring people in from the Valleys' – they stated this could be achieved by providing attractions such as a cinema, theatre, small bowling complex and restaurants.

Tourism

- Several stakeholders believed that tourism should be an explicit priority in the Masterplan, particularly given the historical richness of the local area and belief that the history of the area should not be lost.
- There was a need for 'joined-up thinking' to ensure heritage links and walkways were fully exploited.

A Shoppers Attitude Survey (Research and Marketing Plus, 2008) undertaken for Ebbw Vale Town Centre identified the following key points:

- All respondents with the catchment area of Ebbw Vale were… asked what would make them use Ebbw Vale [Town Centre] more frequently. The most popular response stated by two fifths (40%) was…better choice/range of non food shops. Nearly a tenth (9.2%) said that a better choice/range of food shops would make them use Ebbw Vale for shopping more frequently.

- The majority of respondents rated the location/convenience in Ebbw Vale as either very good or good (…90.3%), another high proportion of respondents indicated the presence of banks and building society was very good/good.

- Negative responses include the range of shops where over two thirds (44.9%) rated either poor or very poor and the choice of shops were nearly half of respondents rating either poor or very poor (47.3%).

- A better choice/range of non food and food shops (36.2% and 52.2% respectively) were the most popular responses given by on-street interviewees when asked what improvements they would…prefer in Ebbw Vale to encourage them to visit this area more often and improve their day out experience.

A survey of Ebbw Vale Town Centre businesses undertaken between September and December 2007 asked businesses to identify issues affecting them. The three most common issues were; lack of customer footfall, access to the town and the street cleanliness.

The businesses also identified the following positive and negative aspects of the Town Centre:

Positives:

- Transport in particular the large amount of free parking available within the town
- Marketing, specifically related to events, especially the weekly Friday Market
- Town Centre environment, specifically in relation to its cleanliness

Negatives:

- Business, the biggest concern relates to the number of vacant properties and the small variety of shops available
- Town Centre environment, some businesses felt the town wasn't clean particularly in relation to dog fouling
- Transport, the primary concern was that traffic is not allowed into the Town Centre after 11:00 *(it is understood that this comment has been superseded by events)*

Annex F

Sustainable Development Framework

1 SUSTAINABLE DEVELOPMENT FRAMEWORK

1.1 INTRODUCTION

A full appraisal of relevant sustainable development policy was undertaken at the start of the project. This annex sets out a sustainable development framework which responds to that policy, enabling a clear 'line of sight' to be drawn between overarching policy objectives and the recommendations of this study. A key part of the framework is a set of Sustainability Objectives and associated Key Performance Indicator targets (see *Table 1.1*), which have been agreed with the client team. Together they provide a clear and transparent means of testing the recommendations of this study against the agreed objectives, and for monitoring progress against those objectives during the implementation phases. In order to ensure a consistent alignment with the wider principles of the LDP (which was being developed along side this framework) a cross check with emerging LDP sustainability objectives was undertaken. This Framework also identifies the emerging LDF challenges that each objective addresses (as identified in Annex A).

The approach is based on that successfully being implemented at The Works, and many of the objectives which follow, align with those of The Works. Some objectives differ from those of The Works, in order to reflect policy developments, current best practice, or the characteristics of the study area.

Importantly, the objectives are holistic in their approach, seeking to address social and economic issues in addition to environmental and resource use considerations. The key overarching objectives for this project were agreed as follows:

1) ***Economic Sustainability: To Create and Progress a Prosperous Society within Ebbw Vale and the Wider Heads of the Valleys Area***
2) ***Social Sustainability: To Create and Enhance Sustainable Communities within Ebbw Vale and the Wider HoV Area***
3) ***Environmental Sustainability: To Create and Enhance a Sustainable Environment in Ebbw Vale and the Surrounding Area***
4) ***Resource Sustainability: To Enhance the Sustainable Consumption of Resources and Reduce the Ecological Footprint of Ebbw Vale***

Table 1.1 Sustainable Development Objectives and Framework

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
Economic Sustainability: To Create and Progress a Prosperous Society within Ebbw Vale and the Wider HoV Area					
To Support Sustainable Economic Growth	To enhance the attractiveness of Ebbw Vale as a place for business investment	Challenges 1 and 2	Level of private sector investment (£) in to the Town Centre and Northern Corridor	Progressive cumulative total	Developer cost plans
			% change in number VAT registrations in target project areas.	Increasing	BGCBC – VAT register
			Development of economic market sectors within Ebbw Vale and wider HoV area	Increasing	Employment by sector; Diversity of market sectors within area (eg through GOAD website)
	To support a more dynamic, diverse and enterprising Local Economy	Challenges 1 and 2	Number of local (HoV) firms benefiting from framework procurement, and value of project procurement to local (HoV) firms and Welsh firms	Continuous improvement i.e. quarterly increase in number of local firms and the value to local welsh firms	Developer procurement records and Sustainable Procurement Strategy
			Change in residential property price (£) in Ebbw Vale	Increasing	BGCBC housing department or available online
			The enhanced performance of a vibrant retail lead Town Centre	Increasing turnover and national retailers represented reduced vacancies.	Increase in turnover potential of Town Centre through CACI estimates, retail survey
			Number of proposed projects in the Ebbw Vale area delivered.	Increasing	Planning consents

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
	To maximise local employment, training and education opportunities	Challenges 1 and 14	Number of construction jobs, proportion local (HoV) employees and proportion previously unemployed local employees	40% construction jobs to be filled by people living within HoV area, of whom half previously unemployed	Social Clauses (between Jobmatch and contractors) Developer/contractor employment and training records
			Number of jobs created by new land uses in the Ebbw Vale area, and proportion of local employment	Increasing	Social Clauses (between Jobmatch and occupiers). occupier employment records
			Number of employment based training places provided.	10% of construction phase jobs to be training positions	Social Clauses (between Jobmatch and contractors) Developer/contractor employment and training records
Social Sustainability: To Create and Enhance Sustainable Communities within Ebbw Vale and the Wider HoV Area					
To Enhance Accessibility and Create Liveable Communities for all Residents of Ebbw Vale	To strengthen the local community and enhance community participation in Ebbw Vale and the wider HoV area	Challenge 3	Change in proportion of positive responses to survey of Ebbw Vale community attitudes re quality of life and Ebbw Vale	Increase in proportion of positive results	Surveys
			Increased engagement in community/town events and activities	Increasing	Attendance at local authority/community consultation events
	To improve the quality of Blaenau Gwent housing stock	Challenge 4	% of housing achieving Code for Sustainable Homes level 4 or above	100% of new houses built on public sector led projects. Private sector required to achieve statutory compliance as a minimum	Plot by plot BRE assessments
	To improve the	Challenge 3 and 6	The Implementation of key	To implement all identified	Projects implemented

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
	availability and accessibility of key community facilities in and around Ebbw Vale		access routes throughout the Ebbw Vale Community, including the integration of The Works into the wider area	projects	
			The provision of the key non vehicular access route to community facilities.	To implement all identified projects	Projects implemented
			The provision of local community facilities	To implement community facilities in accordance with the growth of Ebbw Vale.	Number of facilities provided
To Create a Healthy Future for Current and Future Residents of Ebbw Vale	To enhance the health and wellbeing of residents and workers within Ebbw Vale	Challenge 6 and 9	Assisting reduction of Incapacity Benefit take-up	Decrease	BGCBC statistics
			Proportion of new dwellings that are affordable and proportion of affordable dwellings occupied by local (HoV) people	At least 10% of the houses on each plot should be affordable	Affordable housing records; Survey data
			Proportion new housing occupied by local (HoV) people	Increasing	Survey data
	To reduce crime, social disorder and fear of crime	Challenge 14	New developments identifying development principles in accordance with Secure by Design standards	100%	Plot by plot certification
Environmental: To Create and Enhance a Sustainable Environment in Ebbw Vale and the Surrounding Area					
To Promote Sustainable Environmental	To implement and monitor the use of best practice environmental	Challenge 12 and 13	Proportion construction areas within Ebbw Vale achieving Considerate	100%	Monitoring through BGCBC planning department

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
Management	management techniques and sustainable procurement of resources		Contractor status		
			Proportion of non-residential operational activities with Environmental Management Systems (EMSs) such as ISO14001	100%	Annual Business Survey
	To minimise the environmental impact of any proposed development and maximise environmental enhancement.	Challenges 10 and 12	Proportion of developments supported by environmental documentation identifying potential impacts and mitigation and enhancement measures	100%	Planning Dept (Planning Applications)
To Protect and Enhance the Physical Environment	To protect and enhance the physical landscape of the town and its surrounding area, including features of heritage value	Challenges 10 and 11	The proportion of brownfield land utilised through the regeneration of Ebbw Vale	100% - all Northern Corridor and Town Centre Plots are brownfield	BGCBC records
			Linkages made to surrounding landscape; enhanced accessibility to key landscapes such as Brecon Beacons	To provide high quality linkages along key routes	Landscape project implementation
			Proportion and interconnection of public green spaces	To implement recommended projects	Project plans
	To protect and enhance local biodiversity, including designated and non-designated sites of value	Challenge 10	Extent of delivery of Biodiversity enhancements within individual developments	As defined by Code for Sustainable Homes (Level 4 as a minimum) and BREEAM (Excellent as a minimum) of public sector led projects. Private sector	BREEAM and CSH certifications

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
				required to achieve statutory compliance as a minimum.	
			Area of habitats created / maintained which provide for Gwent BAP Local and Priority habitats and species	To maintain an increasing area of habitat over the period of LDP	BGCBC planning team data
Resource Sustainability: To Enhance the Sustainable Consumption of Resources and Reduce the Ecological Footprint of Ebbw Vale					
To Reduce the Carbon Footprint of Ebbw Vale	To promote the development of a low Carbon Community	Challenges 12,13 and 14	The proportion of energy use reduced within proposed land use building types	As defined by Code for Sustainable Homes (Level 4 as a minimum) and BREEAM (Excellent as a minimum) on public sector led projects. Private sector required to achieve statutory compliance as a minimum.	BREEAM and CSH certifications
			The proportion of renewable energy locally produced and supplied within the Study area	Increasing	Renewable energy projects
			Number of non-residential buildings achieving BREEAM 'excellent' rating or future equivalent.	100% public sector led projects. Private sector required to achieve statutory compliance as a minimum.	BREEAM certifications
			Number of dwellings achieving Code for Sustainable Homes Level 4 as a minimum	100% public sector led projects. Private sector required to achieve statutory compliance as a	CSH certifications

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
				minimum.	
			The delivery carbon footprint of the supply chain to enable the regeneration of the Town Centre and the Northern Corridor.	Reducing	BGCBC Sustainable procurement strategy
To Promote More Sustainable Modes of Transport and their Use	To enhance access to, and use of public transport, walking and cycling	Challenges 6,8,9 and 13	Increased accessibility to bus and train services and facilities	Increasing	BGCBC technical services
			Provision of cycling lanes	Increasing	Project implementation
			Proportion of development plots in the Town Centre and Northern Corridor, covered by operational Travel Plan	100%	Annual Business survey
To Promote Sustainable Water Resources Management	To protect water resources and maintain existing situation with regards to flooding.	Challenges 12 and 13	The proportion and type of development approved contrary to Environment Agency Wales objective	0	Planning applications
			The proportion of the development supported by a comprehensive drainage plan and Sustainable drainage systems.	100%	Planning applications
To Promote Sustainable Waste Management	To reduce materials use and minimise waste production	Challenge 12	Percentage reused / recycled content of construction materials procured (by value)	Minimum 15%	Developer Waste Management Plans
			Percentage construction waste reused / recycled (by weight)	85% of waste reused/recycled	Developer Waste Management Plans

Sustainability Theme	Objectives	Emerging LDP Challenges Addressed	Key Performance Indicators	Target	Monitoring
	To maximise the localised management of waste and recycling	Challenge 12	The number of local facilities provided to facilitate and enhance sustainable waste management within Ebbw Vale	To provide waste facilities in Ebbw Vale in accordance with need	Projects implemented

1.2 *CROSS CHECK WITH LDP OBJECTIVES*

The above objectives have been cross-checked against the objectives within the Local Development Plan SDF, to ensure that they reflect the objectives for the area, as illustrated below in Table 1.2.

Table 1.2 How Ebbw Vale Sustainable Development Objectives (SDOs) Link in with Local Development Plan Sustainability Objectives

LDP Sustainability Objective	Ebbw Vale SDF Objective	Objective reflected
To promote economic growth and strengthen and diversify the local economy	To enhance the attractiveness of Ebbw Vale as a place for business investment	✓
	To support a more dynamic, diverse and enterprising Local Economy	✓
To increase levels of local employment and ensure distribution of opportunities To improve educational attainment and increase skills levels	To maximise local employment and training opportunities	✓
To enable the development of a strong tourism economy to Blaenau Gwent, complementary to the regional offer	To support the development of a strong tourism economy in Ebbw Vale, complementary to the regional offering	✓
To enhance the viability and vitality of town centres	To strengthen the local community and enhance community participation in Ebbw Vale and the wider HoV area	✓
To meet identified housing needs	To improve the quality of Blaenau Gwent housing Stock	✓
To improve the quality of Blaenau Gwent's housing stock		
To secure the delivery and maintenance of quality affordable housing		
To improve accessibility to education, leisure, employment, health, homes and community services for all sectors of the community	To improve the availability and accessibility of key community facilities in and around Ebbw Vale	✓
To promote community health, social care and well-being	To enhance the health and wellbeing of residents and workers within Ebbw Vale	✓
To reduce crime, social disorder and fear of crime	To reduce crime, social disorder and fear of crime	✓
To encourage modal shift from private transport to sustainable transport	To enhance access to, and use of public transport, walking and cycling	✓
To protect and enhance biodiversity across Blaenau Gwent	To protect and enhance local biodiversity, including designated and non-designated sites of value	✓
To conserve and enhance the heritage assets of Blaenau Gwent and their settings	To protect and enhance local townscape including buildings of local and wider cultural and historic value	✓

LDP Sustainability Objective	Ebbw Vale SDF Objective	Objective reflected
To make the best use of previously developed land and existing buildings to minimise pressure for Greenfield development, where this will not result in damage or loss to biodiversity	To minimise the environmental impact of any proposed development and maximise environmental enhancement.	✓
To conserve soil resources and their quality	Not included explicitly due to predominant brownfield nature of the sites. There will be no influence on agricultural land.	✓
To reduce emissions of greenhouse gases, in particular carbon dioxide	To promote the development of a low Carbon Community	✓
To reduce waste generation and maximise reuse and recycling	To reduce materials use and minimise waste production To maximise the localised management of waste and recycling	✓
To maintain current air quality	Not included explicitly due to nature of the framework and focus on low carbon future and reducing car movements.	✓
To maintain current low levels of vulnerability of all development to flooding	To protect water resources and maintain existing situation with regards to flooding.	✓
To promote the use of sustainably sourced products and resources	To implement and monitor the use of best practice environmental management techniques and sustainable procurement of resources	✓
To increase energy efficiency and generation and use of renewable energy across the County Borough	To promote the development of a low Carbon Community	✓
To conserve and enhance surface and ground water quality	To protect water resources and maintain existing situation with regards to flooding.	✓
To protect the quality and character of the landscape and enhance where necessary	To protect and enhance the physical landscape of the town and its surrounding area	✓

As shown in Table 1.2, the LDP sustainability objectives are adequately captured by the Ebbw Vale SDF objectives.

1.3 SUMMARY

Following a review of relevant policy, 21 sustainable development objectives have been identified as best reflecting the sustainable development priorities for the local and regional area based on the objectives within Heads We Win, The Works Masterplan Sustainable Development Framework (SDF), the Ebbw Fawr Valley HARP and the Ebbw Vale Regeneration Strategy. In particular, the objectives have also been cross-checked against the sustainability objectives developed for the Local Development Plan, to ensure that they are consistent with these objectives.

The objectives are therefore considered to be a comprehensive reflection of sustainability aims and objectives at a national, regional, local and area-specific level, and will enable a robust assessment of how far the scheme is going to address relevant sustainability targets.

Annex G

Low Carbon Communities - Drivers for Change

1 LOW CARBON COMMUNITIES - DRIVERS FOR CHANGE

1.1 INTRODUCTION

This Ebbw Vale Sustainable Development Framework seeks to guide the sustainable development of Ebbw Vale over the LDP period to 2021. During that period, there are likely to be significant changes in terms of the policy and aspirations for low carbon development. This section reviews the potential opportunities for low carbon development within the Sustainable Development Framework and provides practical insight into the evolving policy framework.

The Ebbw Vale regeneration will take place over the next five to ten years and might consist of a mix of housing and commercial development with approximately:

- 700 to 1,000 housing units (depending on density of dwellings per hectare);
- 12,000 m^2 commercial leisure; and,
- 100,000 m^2 employment uses.

Therefore, the development will be of an adequate scale and mix to support a range of different low carbon solutions ranging from individual microgeneration technologies to communal energy infrastructure such as site-wide combined heat and power. The density of the development and the approach taken to individual project delivery will be a key determinant of the optimum energy solutions for the sites. In particular, it will influence whether the sites can support a communal solution, to facilitate the use of biomass or combined heat and power.

The planning and design of the site over the next few years will take place within the wider context of significant policy changes in energy and carbon requirements for new developments. Whilst the UK Government has set the framework for changes to the Building Regulations that will require all new development to be zero carbon by 2016, there is still some uncertainty over what this will practically mean in terms of the technical solutions for new buildings. The Government is still in the process of determining the definition of a zero carbon development and the balance of different technical solutions for different development types. However, due to these policy changes and zero carbon ambitions, the construction and roll-out of the development over the next ten years will largely occur against the backdrop of delivering a zero carbon urban environment.

1.2 CONTEXT AND TRENDS

1.2.1 *The road to zero carbon development in Wales*

The UK Government has set-out a process of improvements in minimum energy standards for new developments through systematic tightening of Building Regulations until zero carbon is mandatory in 2016:

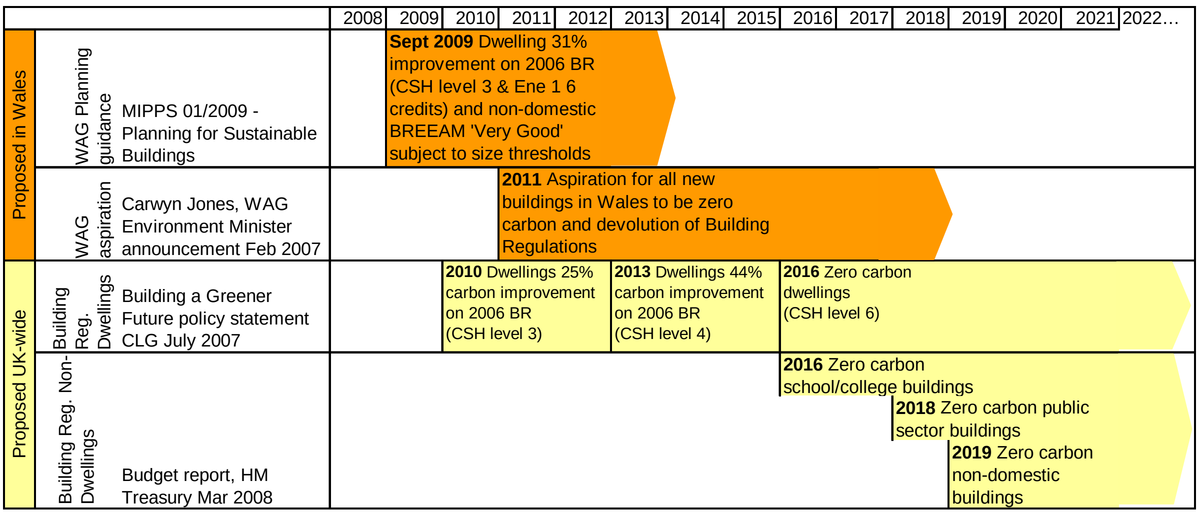
- 2010 – a 25% carbon reduction beyond current (2006) requirements;
- 2013 – a 44% carbon reduction beyond current (2006) requirements; and,
- 2016 – a 100% carbon reduction beyond current (2006) requirements.

In the March 2008 budget the UK Government also announced its intentions for all non-domestic buildings to be zero carbon by 2019.

Within this wider UK context, the Welsh Assembly Government will take over responsibility for Building Regulation legislation within Wales at 2011 and it has announced an ambition to accelerate the zero carbon requirement so that all new development in Wales is zero carbon from 2011. Details of the devolved Regulations have yet to be announced. Nonetheless, the aspiration for achieving zero carbon development at the later date of 2016 is still very challenging and will require innovative approaches from both the public sector as well as the development industry.

Due to the phased introduction of the zero carbon standard, the early phases of development may face less stringent requirements than those post 2016. Nonetheless, this changing carbon requirement need not complicate the planning of the Northern Corridor site as it will make most sense to determine a coherent energy strategy for the whole site at the outset that meets the needs of the longer term zero carbon standard as well as the interim standards. The Council also has the option of setting its own carbon standards for the site to mirror the WAG ambitions for the development to be zero carbon from 2011 (which would mean from the outset).

Figure 1.1 'Timeline to Zero Carbon' for new development in Wales and the UK



1.2.2 *Emerging definition of zero carbon development*

Given the high cost and technical challenges of achieving zero carbon developments through on-site measures, DECC has recently consulted on a more flexible definition of zero carbon which is likely to require 70% carbon reductions through onsite measures but allow the remaining 30% carbon reductions to be delivered through off-site 'allowable solutions' if necessary.

Zero carbon developments will therefore need to achieve minimum fabric standards and some onsite renewable energy generation, with financial contributions for investment in local off-site solutions to offset the residual emissions. The prospects for different technical solutions including combined heat and power, biomass, a medium to large scale wind turbine, heat pumps, PV and solar water heating will need to be determined for the Northern Corridor site to assess their potential contribution to the development's energy needs.

1.2.3 *Proportion of development likely to be captured by the zero carbon standard*

If the 2011 Welsh target is adhered to then all building proposed through the Sustainable Development Framework would be affected by the zero carbon standard. However, if the UK wide 2016 date is that by which the Standard is implemented it would capture much of the public sector residential development. (See programme in *Section 14*)

1.2.4 *Impact of electricity grid decarbonisation*

The UK Government intends for national power generation to increasingly come from low carbon sources over the next few decades through nuclear power, offshore wind and Carbon Capture and Storage (CCS) technology. As the carbon content of electricity begins to decrease the performance of different technologies will also change. In particular, the carbon reductions from heat pumps will increase (as heat pumps use electricity to efficiently generate heat) whereas the carbon reductions from natural gas CHP will decrease. Although gas CHP could become progressively less attractive in carbon terms, it could still make economic sense as the cost of electricity is projected to increase more than that of gas due to the investment in expensive nuclear, offshore wind and CCS technologies. However, there is substantial uncertainty over the speed and pathway of this grid decarbonisation process.

1.3 *WHAT IS THE POTENTIAL FOR LOW CARBON ENERGY GENERATION ON THE SITE?*

1.3.1 *Renewable energy options for the site*

The following options could have potential within the publicly owned parts of the framework area and would benefit from further investigation:

- **Wind turbine at Rhyd-y-blew** – From an initial analysis the site is marginal in terms of wind resource (5.8m/s at 45m above ground level) and the area is relatively close to existing housing. However, there could be potential for a wind turbine at the site (for example in the south western corner of the site) subject to further feasibility work. Locating a turbine here would reduce the development opportunities for this part of the site as buildings could not be placed in close proximity to the turbine. Smaller turbines could be located nearer to buildings but electricity output decreases dramatically with wind turbine size. The output of a single 1MW turbine could potentially offset the carbon emissions from electricity consumption of a majority of the housing planned for the Northern Corridor.

- **Communal systems/ CHP** – the site has the scale and mix of uses that could suit a CHP or biomass plant providing heat and electricity to high density parts of the site.

- **Waste/biomass generation plant** – should a waste or biomass generation plant be located near to the site (e.g. at Waun y Pound industrial estate or alternatively within Rhyd-y-blew) then this could provide both heat and power to parts of the site. It would require communal infrastructure in order to distribute the heat from the plant to the new development.

1.3.2 Renewable energy support mechanisms

A feed-in-tariff (FiT) for renewable generation under 5MWe capacity is set to be introduced in April 2010. This will improve the financial case for small-scale renewable generation in the UK. Importantly, unlike the Renewable Obligation Certificate (ROC) scheme for large renewable generation, the FiT can be claimed whilst counting the carbon reduction for achievement of Code for Sustainable Homes credits. A similar support mechanism for renewable heat called the Renewable Heat Incentive is set to follow in April 2011 which will provide an income stream for renewable heat equipment such as heat pumps, biomass boilers or solar water heating.

1.4 WHAT CARBON STANDARDS SHOULD BE SET?

1.4.1 Alternative approaches for carbon planning

The planning requirements for the framework could adopt a range of different standards:

- **Do Minimum** - weakly enforce UK carbon requirements for zero carbon development from 2016 without adequately assessing the infrastructure needs of delivering a zero carbon solution for the site;
- **Facilitate and Enable Compliance** - promote the longer term zero carbon solutions and provide technical and financial support to the developers for a communal energy system and local generation solutions on the site; or,

- **Provide Carbon Leadership** - adopt stricter/ accelerated carbon standards for the site, ie the WAG zero carbon requirement from 2011 (zero carbon requirement for all publically owned sites across the site).

It is the intention of this framework whereby the Council sets out it's aspirations for low carbon development within the area and identifies how the public sector lead land will be delivered in accordance with the

1.4.2 Setting different carbon targets for different sites based on building types, scale and density

Certain parts of the site may well be able to achieve higher onsite carbon reductions than other parts through the higher density elements of the development being able to support CHP schemes

The lower density development areas are likely to find it difficult to achieve the same level of reductions and may rely more on investment in off-site solutions.

1.4.3 Further planning support and non-planning mechanisms for facilitating low and zero carbon development

Development of offsite solutions to help develop the 'allowable solutions' mechanism within the Blaenau Gwent area - the Council could support the identification of potential off-site solutions for direct investment by the developers of the Northern Corridor site.

Blaenau Gwent CBC could also consider the establishment of a local-authority controlled **Carbon Investment Fund** to help in financing the establishment of a communal energy system based on CHP and district heating across the site.

Annex H

Ebbw Vale Regeneration Framework Executive Summary (Options Development)

EBBW VALE REGENERATION FRAMEWORK: EXECUTIVE SUMMARY

ERM, Powell Dobson Urbanists and DTZ have been appointed by Blaenau Gwent County Borough Council and the Welsh Assembly Government to prepare a Sustainable Development Framework for Ebbw Vale Town Centre and the Northern Corridor. This document summarises the key proposals which are emerging from our study work. Its purpose is to provide the client team with an opportunity for formal comment on the key recommendations, at this key stage of the study programme.

Cyngor Bwrdeistref Sirol Blaenau Gwent County Borough Council
ERM
DTZ
powelldobson URBANISTS

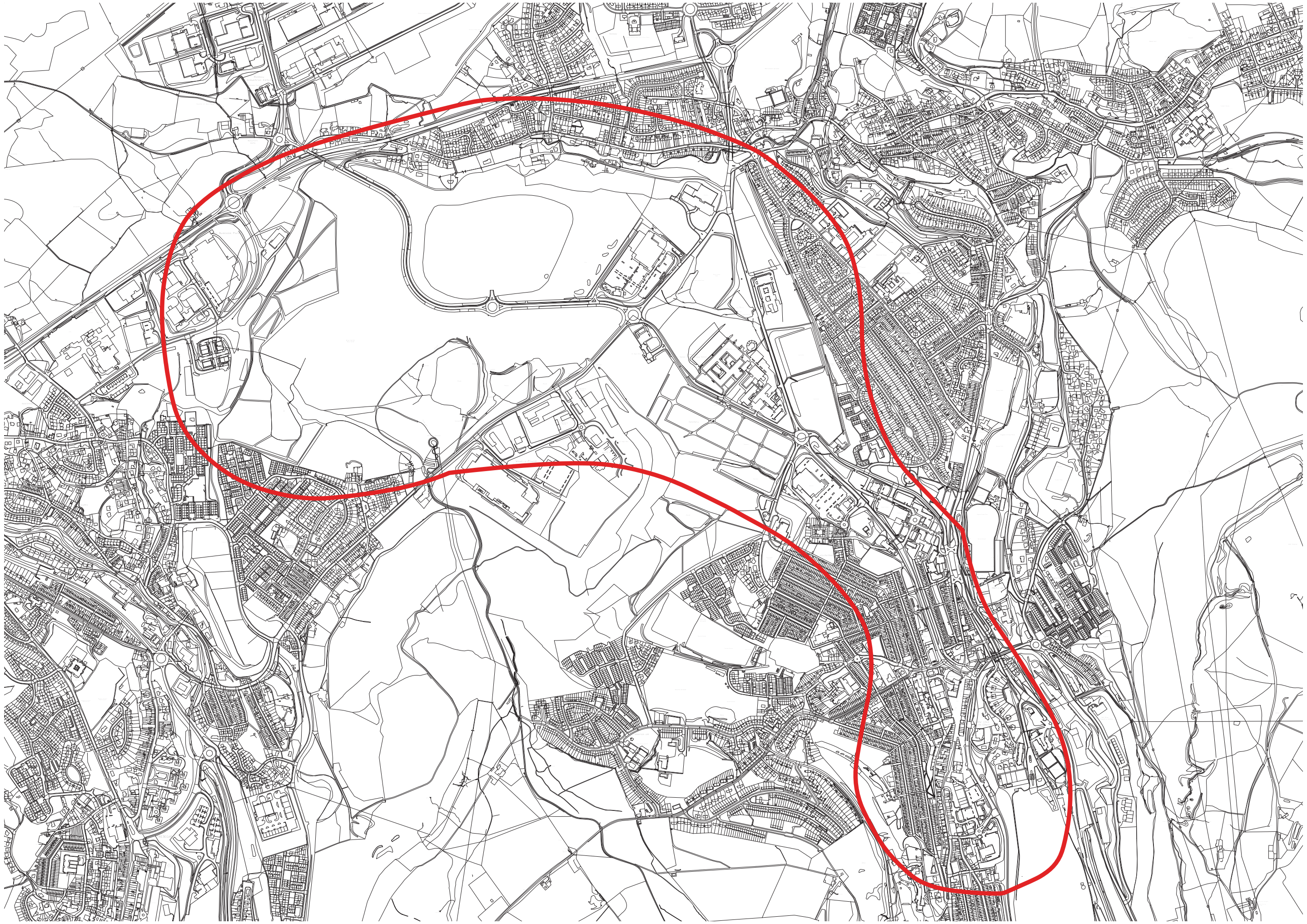


Figure 1: Framework Study Area

SECTION

01

INTRODUCTION

Blaenau Gwent County Borough Council (BGCBC) and the Welsh Assembly Government (WAG) commissioned a multidisciplinary team led by Environmental Resources Management (ERM) and including Powell Dobson Urbanists (PDU) and DTZ to deliver a Sustainable Development Framework for Ebbw Vale Town Centre and the Northern Corridor (see Figure 1 opposite). The purpose of the project was to build on the momentum generated by ongoing regeneration initiatives, including at The Works, Ebbw Vale, to provide the framework to secure holistic, sustainable regeneration for the future.

In response to this brief, the team has identified a number of key development opportunities and interventions which will form the basis of the comprehensive framework that provide the focus for future public and private sector investment.

Project Objectives

The key objectives of the commission are identified as follows:

- To review and establish the existing social, economic, environmental and policy baseline;
- To identify key performance objectives and sustainability indicators to guide future development;
- To identify opportunities to enhance the economic, social and environmental regeneration of the town centre with a key focus on links to ongoing development at The Works;
- To identify and develop future opportunities in the Northern Corridor to benefit the town centre and wider area, with a focus on employment, commercial and residential, mixed use proposals with consideration of office developments including existing public sector buildings;
- Identify the provision of facilities to serve proposed housing and wider community; and
- Investigate and identify potential delivery mechanisms.

Based on these objectives and review of the policy context of the study area, the project team have drawn together a Sustainable Development Framework. Within this there are four key overarching objectives which have informed the development of proposals and plans:

- Economic Sustainability: To Create and Progress a Prosperous Society within Ebbw Vale and the Wider Heads of the Valleys Area
- Social Sustainability: To Create and Enhance Sustainable Communities within Ebbw Vale and the Wider HoV Area
- Environmental Sustainability: To Create and Enhance a Sustainable Environment in Ebbw Vale and the Surrounding Area
- Economic Sustainability: To Enhance the Sustainable Consumption of Resources and Reduce the Ecological Footprint of Ebbw Vale

Report Status and Supporting Evidence

This document has been drawn together by the project team to consolidate the options development process that has been undertaken to date. The options presented have resulted from baseline work undertaken into:

- The existing market and regeneration opportunities
- The environmental conditions and context
- Policy context and LDP representations
- Stakeholder Consultation

This document sets out the options considered and presents initial recommendations in outline terms. Its purpose is to provide the client team with an opportunity to comment formally on the core proposals, prior to the more detailed stage of appraisal and design work.

Options Presented

The report presents options for the town centre and the northern corridor.
The Town Centre options focus on the identification and delivery of specific project opportunities presented by:

- The development of the links from The Works regeneration area,
- Identified market demand for a town centre food retail outlet as a anchor store
- The opportunity for improved public transport infrastructure and reduced through-traffic as a result of the proposed Periphery Distributor Road (PDR) within The Works
- The opportunities to capitalise upon town centre regeneration opportunities as a consequence of the relocation and redevelopment of public sector buildings in the Northern Corridor

The focus to date has been on the southern gateway to the Town Centre and two proposals are presented that provide different solutions to the potential introduction of the Civic Centre and food retail store to this area.

The Northern Corridor has been developed from a more strategic perspective, with land use options identified and considered in the context of the overarching sustainability objectives. Three different land use arrangements are identified.

Study Area

Within the study area, key land uses are proposed taking account of representations by private landowners through the Local Development Plan process and opportunities for land currently in public sector ownership. These land parcels make up the Northern Corridor (Figure 2).

Figure 3 shows the areas of focus in the Town Centre. Bethcar Street (both within and to the south of the study area) has been subject to recent environmental improvements. These improvements, particularly to the south of the study area, will need to be considered in the development of the town centre projects with regards the selection of materials and street furniture.

SECTION

01

INTRODUCTION

THE STUDY AREA

At the beginning of the study, and as part of the Local Development Plan preparation process, sites were identified where landowners had an interest in working with the council to develop them. These sites are shown in figure 2 below and make up the ‘northern corridor’.

Figure 3 shows the area of the town centre that the study considered for further improvement and potential development. Lower Bethcar Street has recently undergone environmental improvements and therefore has not been included within the study area.

The environmental improvements made to Lower Bethcar Street will need be taken into consideration within the framework to ensure consistency in materials and street furniture across the town centre.

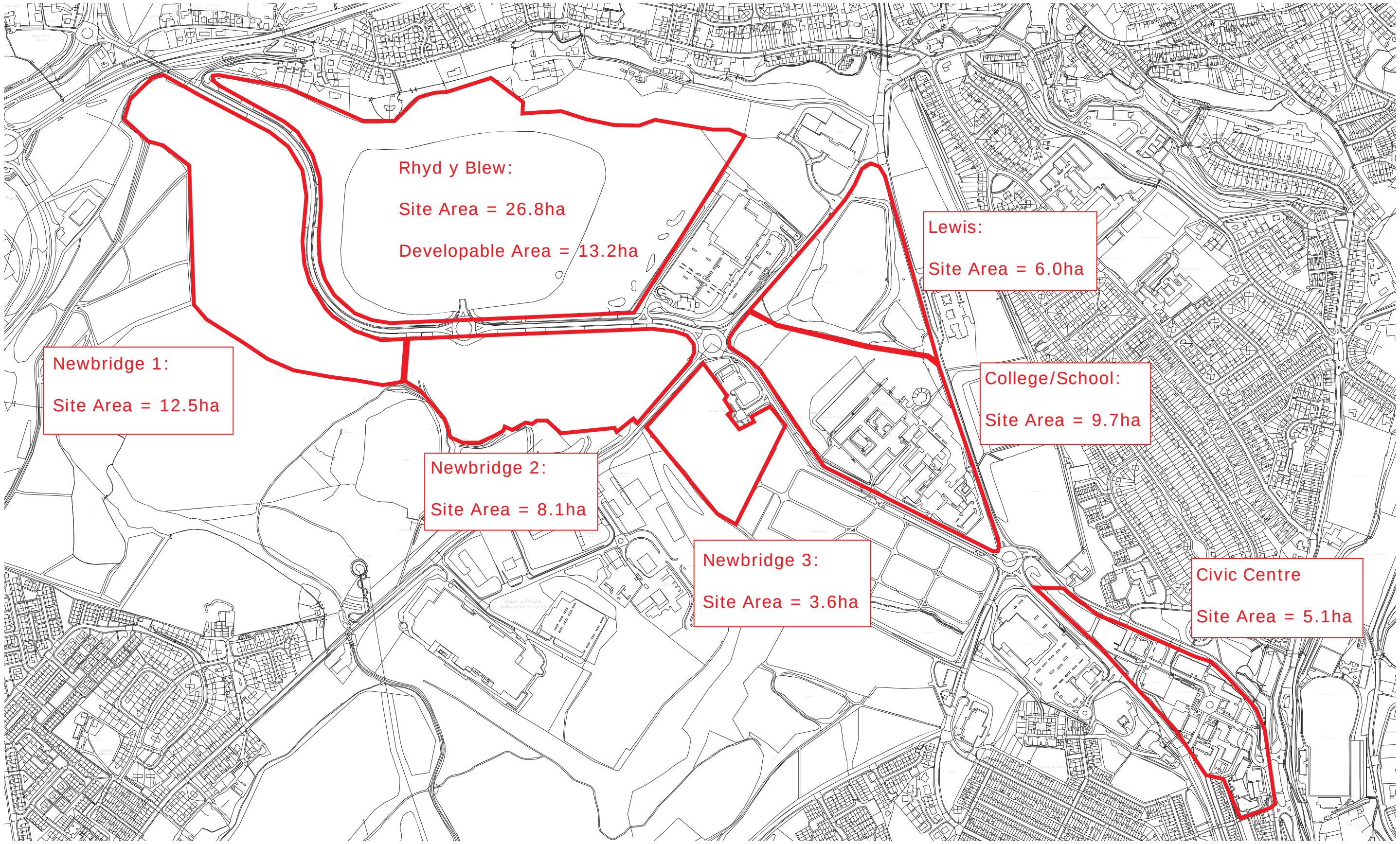


Figure 2: Development sites within the Northern Corridor

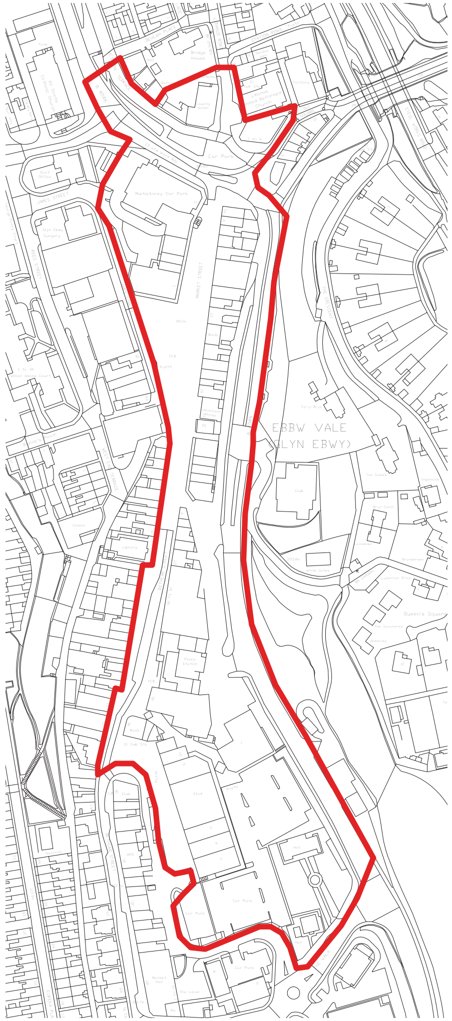


Figure 3: Study Area within Ebbw Vale Town Centre

TOWN CENTRE PROJECTS

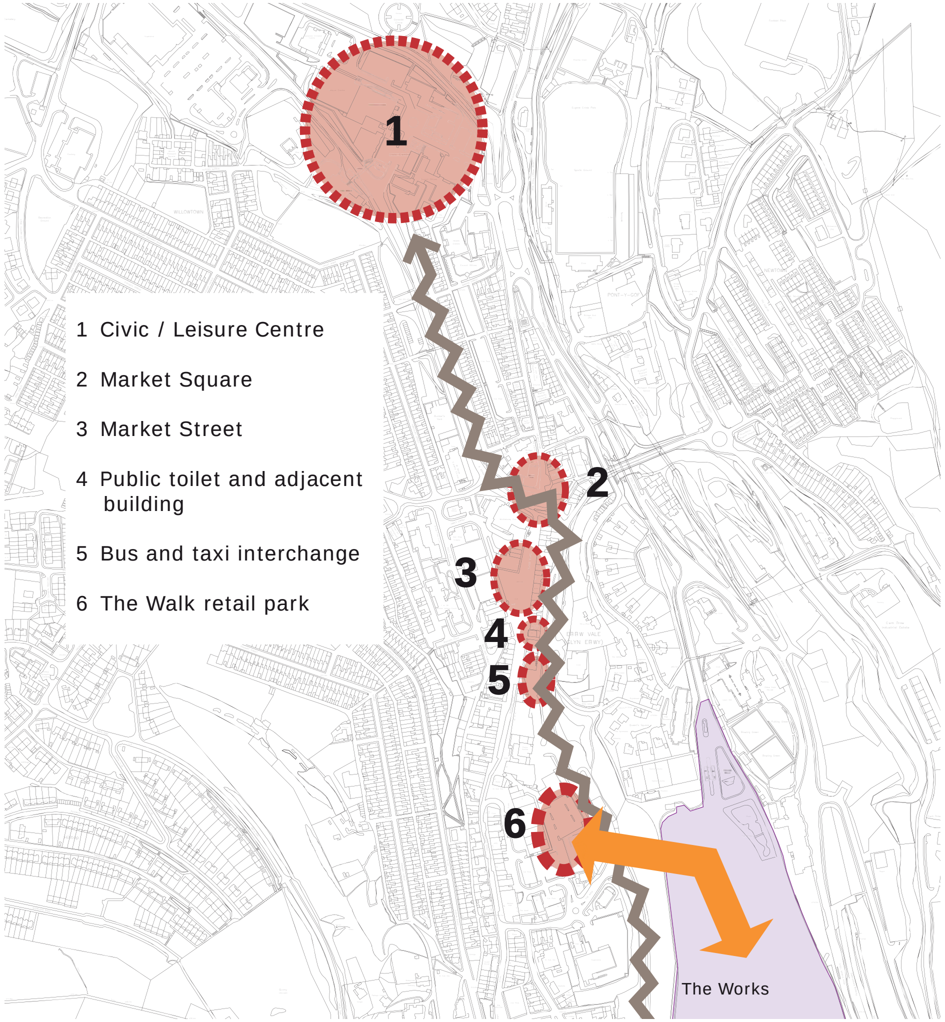


Figure 4: Potential Town Centre projects

Public realm / facade improvements on Lower Bethcar St

New tree planting has softened the streetscape

Floorscape and street furniture improvements

A considerable amount of public realm improvements have been undertaken in Ebbw Vale and these have had a positive effect on the town centre environment. There are, however, several opportunities for further environmental improvements and for the redevelopment of some key sites. These are identified in figure 4.

The following pages identify the existing issues that affect the key sites and recommend objectives for their redevelopment.

SECTION

02

TOWN CENTRE PROJECTS

1. THE CIVIC CENTRE

- Existing buildings are in a poor condition
- Leisure centre is to be relocated to The Works
- It is generally acknowledged that the Civic Centre is in need of replacement
- Many empty and underused buildings
- Inefficient land planning with excess ‘space left over after planning’
- Topographical issues
- Within an easy walk of the town centre

- Redevelopment must support the town centre
- Retail led redevelopment would challenge the town centre
- Potential for residential within walking distance of the town centre and the bus interchange

2. MARKET SQUARE

- Vehicle dominated junction
- Main route through Ebbw Vale and is therefore busy with cars travelling at speed
- Unfriendly pedestrian environment
- Space dominated by Multi-storey car park
- Important gateway into town when arriving from the north
- Demolished building: development opportunity

- Opportunity to create attractive gateway to the town centre
- Potential to increase pedestrian priority across A4046 when new PDR is completed
- Should be consider comprehensively with the redevelopment of the northern building block on Market Street

3. MARKET STREET

- Area dominated by car parking
- Performs important function on market day
- Low quality built form to its northern boundary

- Needs to retain function as market square
- Potential to create a more useable ‘place’ through the removal of car parking and introduction seating and, potentially, small scale kiosk retail/ coffee bar
- Any proposals should, subject to resolving land ownership issues, encompass northern building block as far as and including the multi-storey car park
- A comprehensive approach is required to maximise the impact and potential for success

4. PUBLIC TOILETS AND ADJACENT BUILDING

- Toilets are well used but are in a poor condition
- Single storey structure is out of character with the primarily 2 storey streetscape
- Poor quality pedestrian link through to the bus and taxi interchange

- This site has the potential to create significant streetscape improvements
- Creation of infill development site of 2 storeys which could include new public toilet, ground floor retail and first floor offices
- Significant opportunity to improve pedestrian links to the bus and taxi interchange

5. BUS AND TAXI INTERCHANGE

- Gateway into Ebbw Vale when arriving by car or public transport from the south
- Area is bounded by the rear of Bethcar street properties and, as such, feels like a service area
- Limited bus shelters, cramped waiting island and busy adjacent A4046 creates an unfriendly pedestrian environment and an uninviting arrival point

- The proposed PDR will reduce the level of use that the A4046 has in this area. The road could be downgraded to improve the pedestrian experience
- Major opportunity to completely rethink the mechanics of this part of Ebbw Vale
- Rear of existing properties could be screened by, for example, new transport interchange
- The area should be seen as a southern gateway to the town
- Opportunity to create strong connections with The Works

6. THE WALK RETAIL PARK

- Well used retail park but a poor gateway to the Town Centre
- Area dominated by surface car park
- Town Walk link is low key and does not exploit its gateway potential

- Potential to rationalise and consolidate surface car park to create a more attractive environment.
- Revisit Town Walk: this is a key gateway and its design should reflect this
- Potential increase retail floor space at first floor?

It is important to note that the redevelopment of site 6, The Walk Retail Park, has previously been considered by The Draft Town Centre Links Study (Alan Baxter Associates on behalf of ERM, November 2008). The vision of the area forms the basis of these proposals, but with the following modifications:

- a legible and generous link between The Works and high street,
- an urban layout in which retail can prosper,
- a green and permeable edge to the town centre (A4046) and
- an efficient and welcoming public transport hub.

Since the Draft Town Centre Links Study was undertaken there have been changes to the proposed connections to the Town Centre from The Works site. These changes have resulted in the ‘Gateway Square’ being relocated further north. In particular, the Town Centre Health Check identifies the lack of a Town Centre food retail outlet as being responsible for a proportion of the economic leakage from the Town Centre. It identifies the potential for an additional 10,000sqft of food retail within the town centre. “The Walk Retail Park” site provides the most feasible town centre site for the location of a large proportion of this food retail offer.

In addition, since the Draft Town Centre Link Study, BGCBC has commenced an estates review of public sector assets. This has presented the opportunity to consider the relocation of the Civic Centre to a town centre location.

SECTION

03

TOWN CENTRE GATEWAY






From the south, Ebbw Vale is approached along the A4046. This route passes the rear of the town centre and, as such, does not create an attractive southern gateway into the town.

In addition to the above main vehicular route into the town, links to The Works development will be important to the growth and future success of the town centre. This reinforces the southern gateway as an important nodal point.

As identified in Section 2, the development of a public square to reinforce this gateway and create a link between The Works and the town centre was proposed by the Town Centre Links Study. However, land ownership issues have meant that the have been revisited by this framework.

Opportunities exist in this area which could have a dramatic effect on not only the physical environment, but also the first impression and image of the town. The following opportunities build on the aims and opportunities identified within the Draft Town Centre Links Study:

- Opportunity to introduce an anchor store and/or tenant to the south of the town centre. This could increase footfall through the town and act as a draw to encourage links from The Works
- Rationalise the car park of The Walk retail park to minimise the visual impact of the surface car parking
- Address the rear of the Bethcar Street properties and the rear service areas which front onto the A4046
- Improve the physical environment of the bus and taxi interchanges
- The future PDR would allow for the downgrading of the A4046 in this area in order to create a more attractive and pedestrian orientated environment
- Opportunity to develop a new public square which would help to create a focus for activity in the area

The redevelopment of this area should be driven by the creation of a new public place/ gateway that connects the town centre with The Works, as previously proposed. Proposals should also include the provision of a town centre food retail store, as identified within the Town Centre Health Check.

Three development options have been generated for the southern gateway area and these are described on the following pages.

Opportunity to provide an improved public transport and taxi interchange

SECTION

03

TOWN CENTRE GATEWAY

OPTION 1

1. New public transport and taxi interchange combined with downgraded A4046. New interchange could help to screen service areas and the rear of property boundaries
2. New southern gateway square leading to new arrival platform for links to the Works
3. Development of an new gateway link between the town centre and the Walk retail park
4. Introduction of commercial development on St Johns Ambulance hall site. Potential to include retail and offices.
5. Creation of a direct pedestrian route

Option 1, has a large impact on the town centre creating a ‘landmark’ or gateway to those entering the town from the south via the A4046.

Level changes between the carriageway of the A4046 and the carpark of The Walk would be difficult to manage and would require extensive ramps to be DDA compliant.

Figure 6 shows the outline of the new buildings over the existing built form.

Figure 6: Impact Analysis Option 1

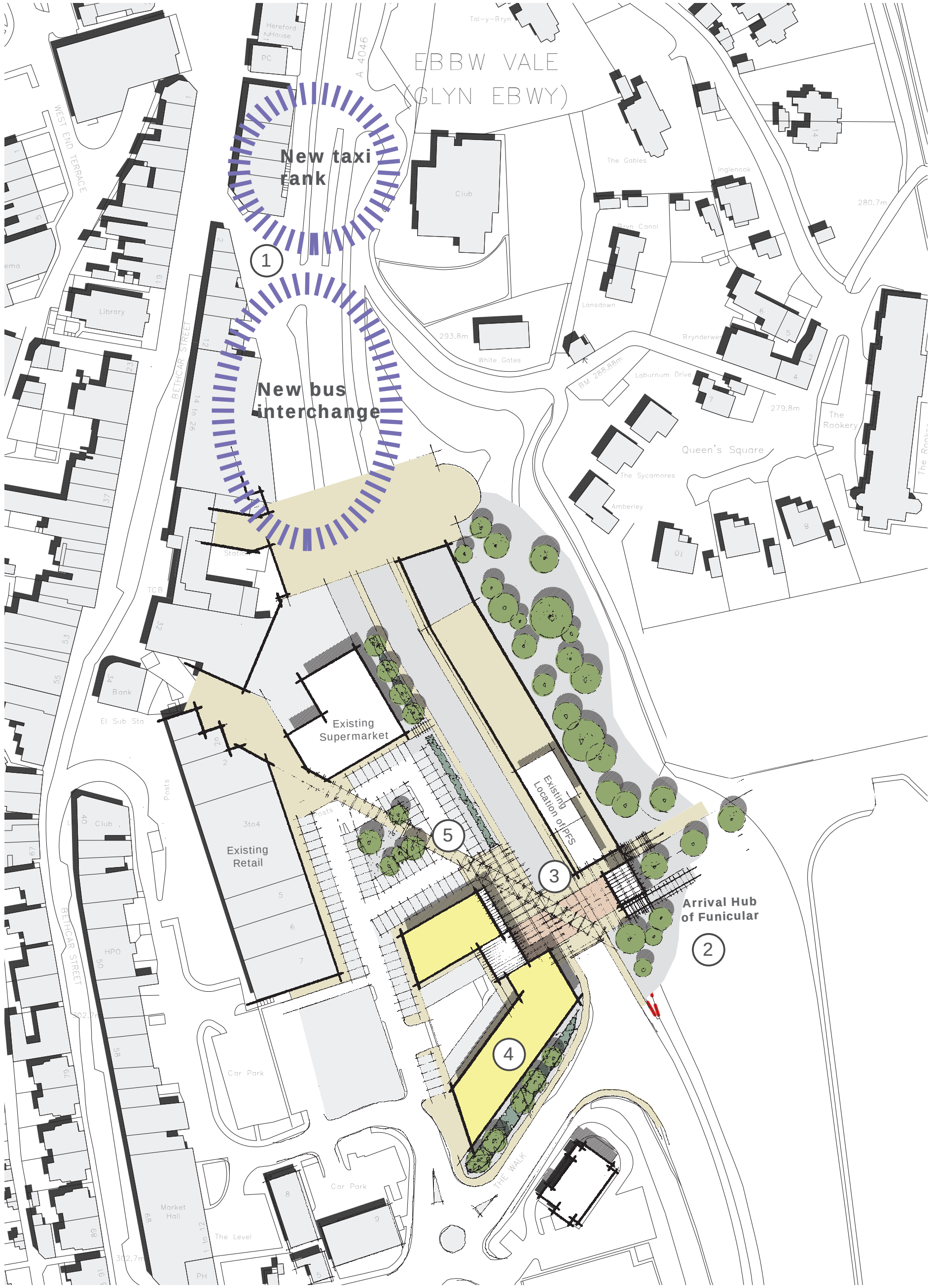


Figure 5: Southern Gateway Proposals Option 1

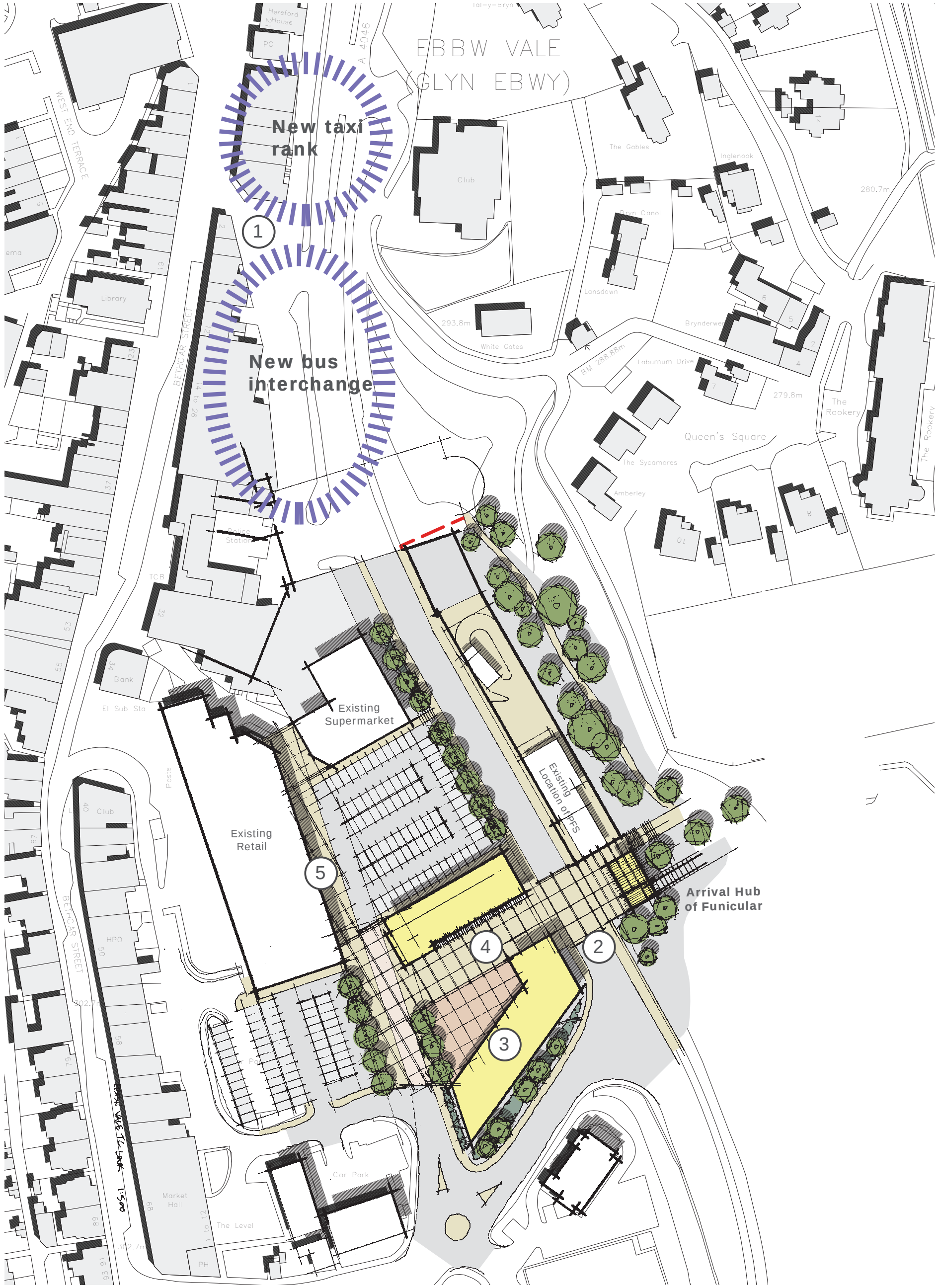


Figure 7: Southern Gateway Proposals Option 2

Option 2, has a similar impact to option 1 but does not require difficult negotiation of levels or extensive reconfiguration of existing surface car parking.

Figure 8 shows the outline of the new buildings over the existing built form.


Figure 8: Impact Analysis Option 2

OPTION 2

1. New public transport and taxi interchange combined with downgraded A4046. New interchange could help to screen service areas and property rears
2. New southern gateway square leading to new arrival platform for links to the Works
3. Introduction of commercial development on St Johns Ambulance hall site. Potential to include retail and offices.
4. Direct link from the Works to a public space enclosed by new development.
5. Considers a link to the town centre that is integrated with the colonnade of the Walk which provides a sheltered route to Bethcar Street and Market Street.

OPTION 3

1. New public transport and taxi interchange combined with downgraded A4046. New interchange could help to screen service areas and property rears.
2. New southern gateway square leading to new arrival platform for links to the Works.
3. Introduction of commercial development on St Johns Ambulance hall site. Potential to include retail and offices.
4. Direct link from the Works to a public space enclosed by new development.
5. Considers a link to the town centre that is integrated with the colonnade of the Walk which provides a sheltered route to Bethcar Street and Market Street.
6. Considers additional development to the east of the A4046.
7. Provides the change to enhance the mix and quality of retail and commercial floor space within the town.
8. Includes an additional pedestrianised space and link across the A4046 with further links to the Works.

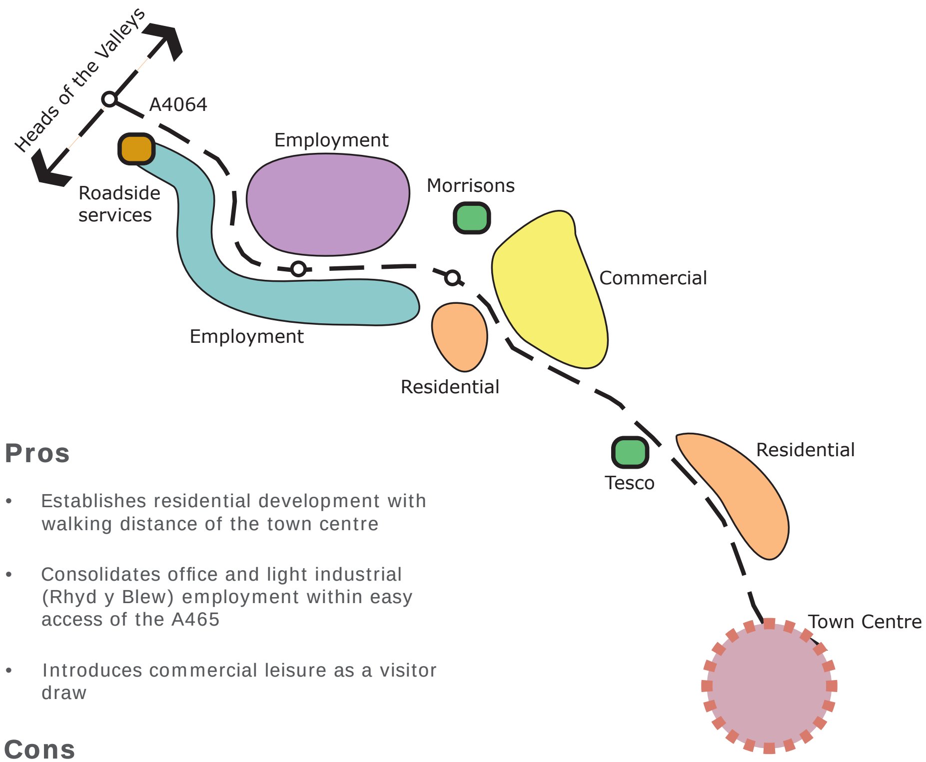
Option 3, has a greater impact on the town than options 1 and 2 by providing further development to the east of the A4046 allowing further links across the road and to the Works.

This option does, however, require acquisition land to the east of the A4046 where a petrol filing station currently sits.

Figure 10: Impact Analysis Option 3

Figure 9: Southern Gateway Proposals Option 3

OPTION 1



The development sites in the Northern Corridor provide a more strategic, use-based development opportunity for Ebbw Vale with the potential for commercial leisure, residential and employment uses.

The following three options show variations in the uses developed on each site and the potential benefits and constraints.

Pros

- Establishes residential development with walking distance of the town centre
- Consolidates office and light industrial (Rhyd y Blew) employment within easy access of the A465
- Introduces commercial leisure as a visitor draw

Cons

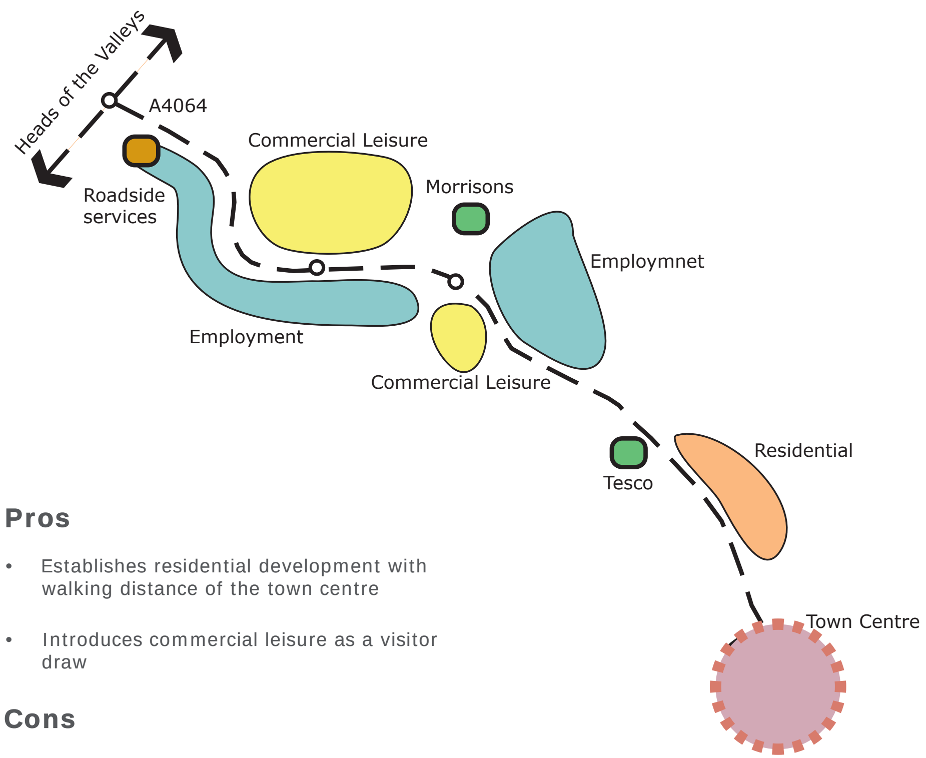
- As a light industrial employment site, Rhyd y Blew has remained vacant for a number of years despite being an allocated site
- Large area of Commercial leisure: it is unlikely that this level will be feasible

SECTION

04

NORTHERN CORRIDOR OPTIONS

OPTION 2



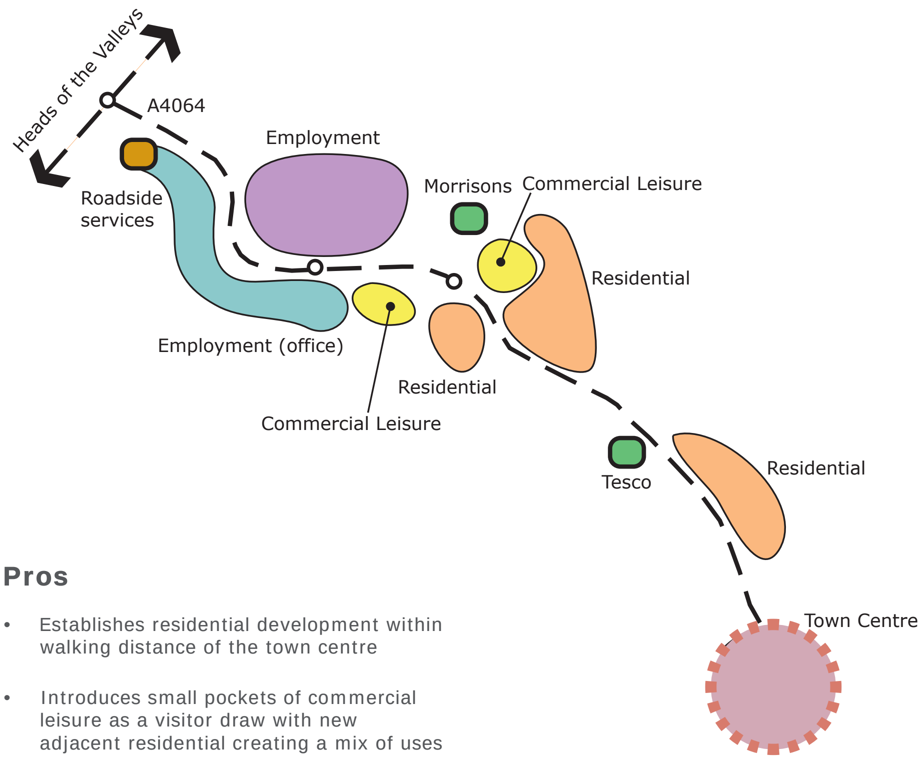
Pros

- Establishes residential development with walking distance of the town centre
- Introduces commercial leisure as a visitor draw

Cons

- Large area of Commercial leisure: it is unlikely that this level will be feasible
- Large amount of office based employment with no light industrial proposed

OPTION 3



Pros

- Establishes residential development within walking distance of the town centre
- Introduces small pockets of commercial leisure as a visitor draw with new adjacent residential creating a mix of uses
- Introduction of a mix of uses on Rhyd y Blew would allow for the opportunity to introduce a catalyst for the redevelopment of the area: A use which generates employment but also acts as a national draw e.g. outdoor pursuits centre of excellence

Cons

- If a suitable catalyst use cannot be secured on Rhyd y Blew then it is likely to remain vacant

VALLEYS REGIONAL PARK CONTEXT

The land to the north of Ebbw Vale has the potential to provide uses that relate to the wider landscape opportunities that already exist in the area.

To the north there is the opportunity to provide links to the Brecon Beacons National Park, and to the east, west and south is the opportunity to link into the Valleys Regional Park.

The proximity of the A465, Heads of the Valleys Road makes the northern corridor highly accessible and access is further strengthen by the recent opening of Ebbw Vale train station that has direct services to Cardiff.

The area has the potential to become a base for outdoor recreation activities, such as walking, cycling, and horse riding. There is also the potential for people visiting the area to take part in outdoor recreation activities to also visit the town centre.

Figure 9: Valleys Regional Park Concept






SECTION

04

NORTHERN CORRIDOR OPTIONS

Schedule of Areas	
Residential	22.4 ha
Commercial Leisure	4.0 ha
Employment (Office)	10.5 ha
Employment led mixed use	13.2 ha

PREFERRED OPTION CONCEPT

Option 3, shown adjacent in Figure 10, is considered to be the preferred option due to mix and quantum of uses throughout the Northern Corridor. This location and mix of uses supports the key overarching objectives of the framework.

Residential uses have been located nearest the town centre to increase the local customer base and encourage walking, cycling, public transport and town centre footfall. The quantum of residential allocation accord with our understanding of the required housing numbers for Ebbw Vale to be promoted through the LDP.

A commercial leisure hub is grouped around the existing Morrisons and KFC, and provides facilities which are physically accessible to existing and proposed communities. In addition to presenting a property development opportunity, the provision of commercial leisure facilities in Ebbw Vale has an important part to play in enhancing perceptions of the area, raising aspirations and promoting wellbeing. This was particularly evident in consultation feedback received as part of pre-application studies for The Works in 2006.

Figure 11: Preferred Option

RHYD Y BLEW PROPOSALS

An employment led (non residential) mixed use allocation is proposed for Rhyd-y-blew. This is intended to align with historic aspirations of WAG and the Council for the creation of large scale employment opportunity on this site. However, we have also sought to create the conditions whereby the opportunity for alternative employment generating uses can be capitalised upon, should they be presented in the future. One such option, which would exploit Rhyd-y-Blew's setting within the Valleys Regional Park and close proximity to the Brecon Beacons, is an Outdoor Pursuits Centre of Excellence, which might occupy a portion of the site. Such a facility would act as a 'national draw' to the area. The A465 Heads of the Valleys Road and the railway link to Cardiff mean that the centre would be highly accessible to people throughout the UK.

Whilst it is recognised that there is a need to maintain flexibility in relation to Rhyd-y-Blew, the preferred option above comments on the potential for an outdoor pursuits centre of excellent.

The adjacent figure, is an illustration of how a range of mixes including such a facility could be accommodated within the site. The existing outdoor pursuits centres in the Valleys Regional Park are very popular and regular visitors are always looking for new activities.

SECTION

06

NEXT STEPS

Based on the preferred options, subject to client comment, the proposed next steps towards production of the final report include:

- Sustainability review of each project against SDF;
- Assessment of Civic Centre needs;
- Preliminary financial appraisal;
- Review of potential delivery mechanisms;
- Programme and cost review;
- Design guidance and standards;
- Assessment of low carbon potential;
- Consultation; and
- Integration with infrastructure needs.