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Welsh Assembly Government

Evaluation of the Regional Aggregate Working Parties (RAWPs) in Wales

The Wales Planning Policy Development Programme



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Disclaimer:

Whilst due consideration has been given to comments received from all consultees, this report sets out the views of the authors alone. This publication and references within it to any methodology, process, service, manufacturer, or company do not constitute its endorsement or recommendation by Welsh Assembly Government.

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EXECUTIVE SUMMARY

Regional Aggregate Working Parties (RAWPs) were established in England and Wales in the early 1970s to enable the provision of aggregates to be managed in such a way as to ensure an adequate security of supply for the construction industry, but also to address concerns regarding the impact of aggregates extraction on the environment.

Following devolution, the Welsh Assembly Government (WAG) has followed an increasingly divergent path from England in its policies for minerals planning, especially with regard to the supply of aggregates. There has been particular emphasis on the use of alternative (secondary and recycled) materials and consideration has been given to a move away from historical supply patterns to the current notions of sustainability including the concept of the 'environmental capacity' of potential source areas to produce aggregates with minimal environmental impacts. As part of these changes, WAG enhanced the role of the RAWPs to provide additional assessments and monitoring reports relating to wider sustainability issues and to provide 5-yearly Regional Technical Statements.

In the light of these policy changes, WAG considered that it was an appropriate time to re-evaluate the role and purpose of the RAWPs in Wales. This report presents the findings of that evaluation. In summary, the key findings are as follows:

The **Managed Aggregates Supply System** is regarded by all stakeholders as both necessary and working well. The system provides an important degree of confidence to the minerals and construction industries in the long term security of supply. Without it, there would be less scope for strategic thinking, less opportunity to achieve sustainable supply patterns and much greater reliance on the appeals process, at much greater cost to everyone.

The **Role of the RAWPs** in monitoring and delivering the managed aggregate supply system is also seen by stakeholders as both important and necessary. Without the RAWPs it would be far more difficult for the WAG to manage the system, to interface with mineral operators, or to achieve the consensus needed between industry and MPAs for the system to work well. The current arrangement of two RAWPs in Wales is considered appropriate due to the very different supply and demand patterns within the two regions. The existing functions of the RAWPs are generally appropriate, but some fine tuning is required.

The **RAWPs Membership** is considered to be about right, and should remain technically focused, but one important omission is the 'end users' sector.

The **Regional Technical Statements** (RTS) now lie at the heart of the managed supply system in Wales and are seen by all consultees as a positive step forward. There is a need, however, for further refinement and for clarification of the status and ownership of the documents. The preparation of the statements has been both difficult and time consuming, not least because this is the first time the RTS concept has been implemented. Both industry and MPAs have noted that the clarity of presentation, the currency of the data and the procedures for dealing with consultation responses have all been compromised to varying degrees – perhaps because of the need to complete the documents within a tight timescale. They also consider that, when the documents are next revised, they need to be written more concisely and in a style that is more attractive and easier to follow.

The attempts to address **Environmental Capacity** (using the IMAECA method) and carbon reduction through the **Proximity Principle** are seen by most stakeholders as being potentially better, *in principle*, than the less prescriptive system in England. However, there are still doubts within industry, especially, as to the validity of the IMAECA approach and more specific concerns regarding the criteria used and the fact that the **apportionment** calculations for individual MPAs do not seem to have taken any account of Environmental Capacity or of differences in external demand between different MPAs (e.g. exports of High Specification Aggregate from South Wales and Limestone exports to NW England from North Wales).

A number of difficulties have been faced by RAWPs in the **collection of data**, particularly on secondary and recycled aggregates. Through their annual reports and RTS, the RAWPs have reported that much of the source data on these materials is of questionable reliability, not least because of differences in survey methods, differences in information sources, and low response rates due to the effects of survey fatigue. Additional data is needed on the transport of aggregates, in order to understand the complexities which already distort the 'proximity principle' (e.g. local distribution patterns via intermediate depots, asphalt plants and concrete batching facilities; and exports of High Specification Aggregates to many parts of England). Such data is also needed to provide a basis for measuring the effectiveness of any future changes in reducing

carbon emissions. The data is complex, however, and time consuming to collate. There will always be a trade-off between the complexity of the information requested and the completeness of the resulting survey responses. The most complete data is that produced by the operators in connection with the 4-yearly AM surveys

With regard to the **Technical Secretaries**, there is a clear potential for these roles to be expanded further to provide MPAs with technical advice and proactive guidance, to encourage cooperative working between MPAs, and to coordinate feedback on the implementation and need for improvement of the RTS. The Technical Secretaries and RAWP Chairmen roles are, however, already very demanding on the host MPA and difficult to achieve on a part-time basis. The situation is compounded by the chronic shortage of experienced MPA officers to take on the role and the need for additional funding if the role is to be expanded further. As in any supply chain, there is a vital need for 'succession planning' to ensure that the system continues to be managed effectively in order to ensure a continued security of supply. A clear strategy and appropriate funding arrangements therefore need to be identified. Specific recommendations have been given to address these points and with regard to strengthening the capabilities of small unitary authorities to engage more effectively in the strategic planning process, through the creation of sub-regional groupings of MPAs.

In conclusion, this review has found that, in most respects, the RAWPs have fulfilled their obligations to the best of their abilities. In most cases this has been sufficient to enable the system to work well, but there is room for improvement in certain areas. Where the RAWPs' objectives have not been fully met, or have been met only with difficulties and/or delays, this has been due to a combination of external factors, ranging from a lack of reliable data in some areas to the pressures of undertaking increased workloads against tight timescales with limited resources. The various recommendations outlined in Chapter 7 of this report should help to address the specific difficulties which have hindered better performance.

CONTENTS

1.	INTRODUCTION AND TERMS OF REFERENCE	1
	Background	1
	Aim	1
	Programme of Work	2
	The Scope of this Report	3
2.	RESEARCH METHODS	4
	Introduction	4
	Desk Based Study	5
	The Use of Assessment Criteria	5
	Analysis of Stakeholder Views	7
	<i>Questionnaire</i>	7
	<i>Meetings</i>	8
	<i>Workshops</i>	9
	Independent Consideration of Alternative Approaches	9
3.	THE MANAGED AGGREGATES SUPPLY SYSTEM IN WALES	10
	Introduction	10
	Aggregates Planning Policy in Wales and the Role of the RAWPs	11
	<i>Demand Forecasts</i>	12
	<i>Future Aggregates Supply</i>	12
	<i>Landbanks</i>	13
	<i>The Enhanced Role of the RAWPs</i>	14
	Other Aggregates Planning Policy Frameworks: England and Scotland	14
	<i>England</i>	14
	<i>Scotland</i>	16
	Summary	17
4.	THE ROLE OF THE RAWPS IN THE MANAGED AGGREGATE SUPPLY SYSTEM IN WALES	18
	The Role of the RAWPs in Delivering Policy Objectives (Objective 1A)	18
	<i>Supporting the Managed Aggregates Supply System in Wales</i>	18
	<i>Production of the Regional Technical Statements</i>	18
	<i>Implementation of the Regional Technical Statements</i>	19
	Other Outcomes to Which the RAWPs have Contributed (Objective 1B)	21
	The Scope of the RAWPs' Membership (Objective 1C)	21
	The Scope of the RAWPs' Designated Functions (Objective 1D)	22
	<i>Collection of Data on Secondary and Recycled Aggregates</i>	23
	<i>Potential for providing technical mineral advice to MPAs</i>	23
5.	PERFORMANCE EVALUATION	24
	The Performance of the RAWPs (Objective 2A)	24
	<i>Measurable Criteria</i>	24
	The Effectiveness of the Technical Secretary Role (Objective 2B)	31
	Evaluation of the Costs of the RAWPs and Technical Secretaries (Objective 2C)	33
	<i>RAWP Costs</i>	33
	<i>Technical Secretary Costs</i>	33

6. ALTERNATIVE APPROACHES	35
Alternative Ways of Implementing the Technical Secretary and Chairman Roles (Objectives 3A and 3B)	35
<i>Sourcing of the Technical Secretaries</i>	35
<i>The Role of the Technical Secretaries</i>	35
Potential Impacts for Society, the Economy and the Environment of not achieving a Managed Aggregates Supply (Objective 3C).....	36
Scenarios for Future Demand and the Responsiveness of the Current System for Aggregates Provision (Objective 3D).....	37
Alternative Mechanisms for the Delivery of Core Policy Objectives (Objective 3E)	37
Alternative Mechanisms and Additional Scope for Data Collection and Collation (Objective 3F)	40
<i>Alternative Mechanisms</i>	40
<i>Additional Scope</i>	40
7. KEY FINDINGS AND RECOMMENDATIONS	41
GLOSSARY	46

APPENDIX A: List of Desk Study Resources

APPENDIX B: List of Stakeholders

APPENDIX C: Questionnaire sent to Stakeholders

APPENDIX D: Agenda and Questions for Consideration provided at the Workshops

APPENDIX E: MTAN1 Annex A: Regional Aggregates Working Parties (RAWPs)

APPENDIX F: Environmental Criteria and Aggregates Categories used in EMAADS/IMAECA

APPENDIX G: Evidence for the RAWPs Meeting their Functions

1. INTRODUCTION AND TERMS OF REFERENCE

Background

- 1.1 Regional Aggregate Working Parties (RAWPs) were established in England and Wales in the early 1970s to enable the provision of aggregates to be managed in such a way as to ensure an adequate security of supply for the construction industry, but also to address concerns regarding the impact of aggregates extraction on the environment.
- 1.2 Together with eight English RAWPs (subsequently increased to nine), two RAWPs were set up in Wales, one for the North Wales region and one for the South Wales region. Together, the RAWPs have played a fundamental role in the collection of information to support the prediction of national need and in giving advice to Mineral Planning Authorities (MPAs) on the level of aggregates provision they are expected to make.
- 1.3 However, following devolution, the Welsh Assembly Government has followed an increasingly divergent path from England in its policies for minerals planning, especially with regard to the supply of aggregates. In particular, two key minerals policy documents have been published: *Minerals Planning Policy, Wales (MPPW)* was published in 2000, followed by the *Minerals Technical Advice Note (Wales) 1: Aggregates* (hereinafter referred to as *MTAN1*) in 2004. This national policy and associated guidance has largely been based on research projects commissioned by the Assembly which have examined alternative ways of maintaining an adequate supply of aggregates whilst giving much greater weight to sustainability issues. There has been particular emphasis on the use of alternative (secondary and recycled) materials¹ and consideration given to a move away from historical supply patterns to the current notions of sustainability including the concept of the 'environmental capacity'² of potential source areas to produce aggregates with minimal environmental impacts. *MTAN1* also introduced an 'enhanced role'³ for the RAWPs to provide additional assessments and monitoring reports relating to these wider sustainability issues for the provision of aggregates and in particular to provide a 5 year Regional Technical Statement (RTS)⁴.
- 1.4 In the light of these policy changes, the enhanced role of the RAWPs considered in *MTAN1* and the progress made towards the production of the two RTS, the Welsh Assembly Government considered that it was an appropriate time to re-evaluate the role and purpose of the RAWPs. That, as explained below is the basis of this research report.

Aim

- 1.5 The **aim** of the project is described in the project specification as follows:
- 'To review the role of RAWPs in the provision of a managed aggregates supply system for Wales and evaluate the terms of reference, performance and administration of the RAWPs, to ensure their effective functioning in terms of their current role as set out at Annex A in MTAN 1 and in the contracts of the Technical Secretaries. The review will also consider the costs and benefits of alternative approaches.'*
- 1.6 This is reflected in the more concisely stated **requirement** of the research, which is:
- 'to carry out a thorough review of the objectives and role of the RAWPs in ensuring a sustainable supply of aggregates for Wales. This is to include the work and performance of the RAWPs and the provision of the secretariat and technical services necessary for their effective functioning.'*

¹ *MTAN1*, para 34, p15 for example

² *MTAN(Wales)1: Aggregates (2004)*, para 27, p12 for example

³ *MTAN1*, para 27, p12

⁴ *MTAN1*, para 50, p20

- 1.7 The more specific **objectives** for the research are numerous, and are listed in the project specification as follows:
- *'To look at the outcomes to which the RAWPs have contributed;*
 - *To assess the role that the RAWPs have played in delivering the policy objectives for aggregates provision in Wales;*
 - *To evaluate the performance of the RAWPs against their functions⁵;*
 - *To consider their membership;*
 - *To consider the effectiveness of the Technical Secretaries using criteria derived from their roles⁶;*
 - *To assess and evaluate the incidental costs and benefits deriving from the RAWPs and from the role of the Technical Secretaries;*
 - *To consider alternative ways of implementing the Technical Secretaries' and Chairman's roles, and their costs and benefits, including financial;*
 - *To compare alternative mechanisms for the delivery of these functions and identify how this can be improved;*
 - *To consider the scope of the designated functions, including the collection of data on secondary and recycled aggregates, the potential for providing technical minerals advice to MPAs;*
 - *To consider the scope of the RAWPs membership;*
 - *To consider the potential impacts for society, the economy and the environment of not achieving a managed aggregates supply;*
 - *To consider scenarios for future demand and evaluate the responsiveness of the current system for aggregates provision;*
 - *To compare the alternative mechanisms for the delivery of the core policy objectives, including the options of continuation of the RAWPs, national or regional apportionment, market competition and reaction to activity on the ground;*
 - *To consider alternative mechanisms for the collection and collation of data, the need for these data and the frequency of survey.'*

Programme of Work

- 1.8 There were essentially four parts to the project:

Part 1: Desk Study Review – To undertake a thorough desk-based review of relevant recent research, policy documents, annual RAWP reports and monitoring surveys and construction industry statistics.

Part 2: Gathering Stakeholder Views – To gather information and opinions from a wide range of stakeholder organisations that are involved with or affected by the work of the RAWPs, by means of:

- A questionnaire to a wide stakeholder base;
- Detailed interviews with key representative stakeholder organisations;
- Facilitated workshops to discuss the initial findings from the detailed interviews with a wider stakeholder base and to encourage suggestions on the future scope of the RAWPs.

⁵ The functions of the RAWPs are specified at Annex A of the *Minerals Technical Advice Note (Wales) 1 – Aggregates* (March 2004)

⁶ The roles of the technical secretaries are set out in the job descriptions accompanying their contracts

Part 3: Evaluation – To include both an objective appraisal of the RAWPs contribution to a managed aggregates supply and an assessment of their effectiveness and performance, using criteria derived from their roles which include environmental, social and economic objectives for the supply of aggregates;

Part 4: Reporting and Dissemination – To analyse and discuss the findings described above and present these within a research report and at a Wales-based dissemination event;

The Scope of this Report

- 1.9 The project research methods (outlined above in para 1.8) are described in more detail in Chapter 2 whilst Chapter 3 provides a brief résumé of the managed aggregates supply system in Wales. As required by the specification, Chapter 3 also provides a short review of the policy framework for aggregates supply in England and Scotland by way of comparison.
- 1.10 Chapters 4 to 6 then present the results of the research, including a summary of qualitative views on the existing role of the RAWPs (Chapter 4); an objective assessment of the performance and effectiveness of the RAWPs and their Technical Secretaries to date (in Chapter 5) and a discussion of possible alternative approaches for the delivery of aggregates policy (in Chapter 6). Chapter 7 concludes the report with recommendations to the Welsh Assembly Government in the light of these results.

2. RESEARCH METHODS

Introduction

2.1 This chapter describes the methods used in this research to address the aims and objectives of the project. For this purpose, the overall aim (as set out in para. 1.5, above) has been divided into three main components, and the various more detailed objectives (as set out in para. 1.7) have been subdivided amongst these three components, as shown in Table 2.1, below. The research methods that have been used to address each of the corresponding tasks are shown in the table.

Table 2.1: Research Methods used to meet each Project Objective

	Project Aim	Corresponding Project Objectives	Research Method
Achievements of the RAWPs to date	1) review the <u>role</u> of the RAWPs in the provision of a managed aggregates supply system for Wales.	1A) To assess the role that the RAWPs have played in delivering the policy objectives for aggregates provision in Wales	<ul style="list-style-type: none"> • Desk based study; • Analysis of stakeholder views.
		1B) To look at the outcomes to which the RAWPs have contributed	
		1C) To consider the scope of the RAWPs membership	
		1D) To consider the scope of the designated functions, including the collection of data on secondary and recycled aggregates and the potential for providing technical mineral advice to MPAs	
	2) evaluate the <u>terms of reference</u> , <u>performance</u> and <u>administration</u> of the RAWPs to ensure their effective functioning.	2A) To evaluate the performance of the RAWPs against their functions	<ul style="list-style-type: none"> • Use of assessment criteria.
		2B) To consider the effectiveness of the Technical Secretaries using criteria derived from their roles	
2C) To assess and evaluate the incidental costs and benefits deriving from the RAWPs and from the role of the Technical Secretaries		<ul style="list-style-type: none"> • Desk based study 	
Alternative Future Approaches for the Managed Aggregate Supply System in Wales	3) Consider <u>alternative approaches</u> .	3A) To consider alternative ways of implementing the Technical Secretaries' and Chairman's roles, and their costs and benefits, including financial;	<ul style="list-style-type: none"> • Analysis of Stakeholder Views • Independent consideration of alternative approaches
		3B) To compare alternative mechanisms for the delivery of these functions and identify how this can be improved;	
		3C) To consider the potential impacts for society, the economy and the environment of not achieving a managed aggregates supply;	
		3D) To consider scenarios for future demand and evaluate the responsiveness of the current system for aggregates provision;	
		3E) To compare the alternative mechanisms for the delivery of the core policy objectives, including the options of continuation of the RAWPs, national or regional apportionment, market competition and reaction to activity on the ground;	
		3F) To consider alternative mechanisms for the collection and collation of data, the need for these data and the frequency of survey	

2.2 Each of the four research methods (desk studies, the use of assessment criteria, analysis of stakeholder views and independent consideration of alternative approaches) is described in detail below.

Desk Based Study

- 2.3 The desk based study comprised a thorough review of pertinent information to be found within:
- relevant recent research;
 - relevant policy documents, in particular, the national minerals policy documents: *'Minerals Planning Policy, Wales (2000)* and *Minerals Technical Advice Note 1 (2004)*;
 - the draft Regional Technical Statements for North and South Wales;
 - annual RAWP reports and monitoring surveys for North and South Wales;
 - minutes of the RAWP meetings and RTS sub-group meetings;
 - Guidelines for Aggregates Provision including the 1995 Guidelines completed by the North and South Wales RAWPs and the recent Apportionment detailed in the two RTS documents; together with the Guidelines produced for England by the former Office of the Deputy Prime Minister in 2003 and the updated Guidelines for England issued for consultation by the Department of Communities and Local Government (CLG) in April 2008;
 - relevant construction industry statistics, specifically the analysis of demand and consumption for primary and secondary aggregates in Wales produced by the Quarry Products Association in September 2006 for use in the RTS process, and;
 - the Contracts of the Technical Secretaries.
- 2.4 The specification also required that national policy documents from England and Scotland, together with those from Wales should be identified and reviewed. The Key documents are: *Minerals Policy Statement 1: Planning and Minerals* and the accompanying *Planning and Minerals Practice Guide* (CLG, November 2006) for England; and *Scottish Planning Policy 4: Planning for Minerals* (Scottish Executive, September 2006) for Scotland.
- 2.5 A full list of the desk study resources is provided in Appendix A.

The Use of Assessment Criteria

- 2.6 Two 'measurable' project objectives required the development of assessment criteria, namely:
- (2A) to evaluate the performance of the RAWPs against their functions, and;
 - (2B) to consider the effectiveness of the Technical Secretaries using criteria derived from their roles.
- 2.7 The assessment criteria used were simply the functions of the RAWPs (as listed in MTAN1 Annex A) and the terms of reference for the technical secretaries (detailed within their contracts). However, as MTAN1 was published in 2004 and the RAWP functions listed in that document refer to the 'future role of the RAWPs', the effectiveness of the RAWPs prior to 2004 cannot be judged against those criteria. Some consideration has therefore also been given to the more limited functions of the RAWPs prior to 2004 as listed in the North and South Wales RAWP Reports for 2003. For ease of reference, the various criteria used to assess the performance of the RAWPs and the technical secretaries, and the origin of those criteria, are listed in Tables 2.2 and 2.3, below.

Table 2.2: Criteria used to assess the Performance of the RAWPs

Criteria	Origin of Criteria
<p><i>Criteria 1-6 (applicable only since the publication of MTAN1 in 2004)</i></p> <ol style="list-style-type: none"> 1. To continue to monitor production of primary and secondary aggregates; 2. To continue to monitor the distribution of primary and secondary aggregates including imports and exports of aggregates; 3. To continue to collect data on primary aggregates reserves at regional and mineral planning authority levels; 4. To monitor the generation of all wastes that have potential for use as aggregates; 5. To monitor the generation, re-use and recycling of secondary materials and recycled aggregates from construction and demolition waste; 6. To monitor UDPs and future development programmes and major proposals to assess the regional demand for aggregates and determine potential areas where there could be a shortfall of supply. 	<p><i>MTAN 1 Annex A: Section A3 – Future Role of the RAWPs</i> Sub Section: <u>Monitoring Aggregates</u></p>
<p><i>Criteria 7-11 (applicable only since the publication of MTAN1 in 2004)</i></p> <ol style="list-style-type: none"> 7. To assess the environmental capacity of MPA areas to meet the demand for aggregates; 8. To assess the reserves of primary aggregates in active and dormant sites and the likelihood of dormant sites being reactivated; 9. To assess the use of secondary and recycled aggregates and consider ways to improve data collection and to increase their use to replace primary resources; 10. To assess the provision/capacity within each unitary authority area to recycle construction and demolition waste, identifying scope to improve the recycling and reuse of aggregates by examining the extent of landfill disposal (and use on exempt sites) and locations of recycling facilities; 11. To assess the arisings of construction and demolition waste, including road planings and their reuse and recovery as aggregates. 	<p><i>MTAN 1 Annex A: Section A3 – Future Role of the RAWPs</i> Sub Section: <u>Assessment of Aggregates Supply and Demand</u></p>
<p><i>Criteria 12-17 (applicable only since the publication of MTAN1 in 2004)</i></p> <ol style="list-style-type: none"> 12. To provide a 5 yearly Regional Technical Statement (within 18 months of the completion of the study of environmental capacity in Wales), to 13. set out the results of the regional assessment of the environmental capacity of each MPA to contribute to an adequate supply of primary aggregates; 14. provide a strategy for the provision of aggregates in the region in accord with that regional assessment, with allocations of future aggregates provision for each mineral planning authority area to provide a strategic basis for future development plans; 15. assess current and future imports and exports of aggregates; 16. assess the current and future contribution of marine aggregates; 17. advise the Assembly on the potential in each region in Wales for increasing the use of alternative materials to replace primary aggregates. 	<p><i>MTAN 1 Annex A: Section A3 – Future Role of the RAWPs</i> Sub Section: <u>Regional Technical Statement for Aggregates</u></p>
<p><i>Criteria 18-19 (applicable only since the publication of MTAN1 in 2004)</i></p> <ol style="list-style-type: none"> 18. The Technical Secretariat of the RAWPs will administer the arrangements for establishing joint voluntary arrangements of local authorities to assess the draft Technical Statement for Aggregates to provide a context for proper consideration of land use issues relating to aggregates provision in unitary development plans; 19. Each local authority in the region should then include in its own unitary or local development plan elements of the agreed Regional Technical Statement that are germane to its area at the earliest opportunity. 	<p><i>MTAN 1 Annex A: Section A3 – Future Role of the RAWPs</i> Sub Section: <u>Joint Voluntary Arrangements of Local Authorities</u></p>
<p><i>Criteria 20-27 (applicable prior to the publication of MTAN1 in 2004)</i></p> <ol style="list-style-type: none"> 20. To regularly monitor the production and sales of aggregate minerals within the region. 21. To assess the total sand, gravel and hard rock (limestone and sandstone) reserves available in the Region suitable for aggregate production (i.e. those with planning permission and other areas where there is some commitment in local authority, statutory and non-statutory plans), making reference to areas where planning permission has been refused and to those in industry ownership; and taking into account the availability of marine dredged materials and the use of materials for non-aggregate purposes. 22. To assess the likely short term demand for aggregates within the Region. 23. To indicate whether, in the short term, current permitted reserves are likely to be adequate. 24. To assess the extent of imports of aggregate minerals from other regions. 25. To indicate to what extent the market area serviced by the Region could and should, be allowed to change in the medium and longer term (i.e. 10 and 20 years respectively). 26. To consider the extent and implications of the present and potential future use of synthetic and waste materials as substitutes for natural aggregates. 27. To take adequate account of agricultural, amenity and other planning conditions in examining the above (particularly 6 (i.e. 'Criterion 25)), (e.g. other land uses and transport). 	<p><i>North Wales and South Wales RAWP reports, 2003</i></p>

Table 2.3: Criteria used to assess the Effectiveness of the Technical Secretaries

Criteria	Origin of Criteria
<p><i>Criteria E1 to E8</i></p> <p>E1 To organise a minimum of 2 RAWP meetings per annum in liaison with Chairman and members plus meetings with Assembly Government, the other Welsh RAWP Secretary and English RAWP Secretaries (including representing the Chairman at UK aggregates meetings as necessary);</p> <p>E2 To organise a minimum of four Regional Technical Statement sub-group meetings;</p> <p>E3 To ensure regular liaison with the mineral planning officers (and for the North Wales RAWP Secretary, the Contract Manager) to progress on monitoring and reporting work;</p> <p>E4 To administer the joint voluntary arrangements of local authorities to consider and secure agreement on the draft Regional Technical Statement for Aggregates;</p> <p>E5 The preparation of an Annual Report;</p> <p>E6 To organise, co-ordinate and collate annual surveys of the production of primary aggregates, road planings and alternative materials;</p> <p>E7 To undertake an assessment of aggregates demand and supply, landbank reserves, both active and dormant, use of secondary and recycled materials as aggregates and environmental capacity for each unitary authority in the region to meet demand for aggregates;</p> <p>E8 To coordinate the 4-yearly Aggregates Monitoring surveys.</p>	<p><i>Terms of reference for the Technical Secretaries, as detailed within their contracts</i></p>

Analysis of Stakeholder Views

2.8 Stakeholders were considered to comprise those people and organisations involved with or affected by the work of the RAWPs. The views of stakeholders were gathered in three ways: through a questionnaire survey, through detailed meetings with key stakeholders and through the use of two workshops. Each of these methods is described below. A list of all identified stakeholders is shown in Appendix B.

Questionnaire

2.9 A questionnaire survey was designed to gain the recipients' views on certain qualitative aspects of the RAWPs' functions, the role of the Technical Secretary and potential alternatives to the RAWPs' current remit. A copy of the questionnaire is provided in Appendix C. This was sent to a total of 145 individuals across a wide range of stakeholder organisations (as listed in Appendix B).

2.10 The questions in the survey covered the following topics:

- the role of the Welsh RAWPs in supporting the managed aggregate supply system in Wales, including their scope and function;
- the role of the Technical Secretaries to the Welsh RAWPs;
- the demand assumptions within the existing Managed Aggregate Supply system in Wales;
- the exploration of possible alternatives for managing the provision of aggregates in Wales.

2.11 A nil return option was included for those recipients who felt they were inadequately placed to complete the questionnaire due to their lack of knowledge of the issues being raised. Despite this option and the use of an extended deadline and a reminder, the response was extremely poor with only 7 completed questionnaires being returned. It is considered likely that this low return rate is three main factors: firstly, although the questionnaires were, as far as possible, targeted at specific individuals within the identified organisations, it was not always possible to do this; secondly, many of the key stakeholders had already agreed to attend more in-depth discussion meetings (see below) covering the same topics; and thirdly, very few of the other organisations were aware of the RAWPs or their importance in relation to the steady and sufficient supply of aggregates: completing the questionnaire was not a high enough priority for them.

- 2.12 The 9 responding organisations were: Snowdonia National Park Authority, the British Aggregates Association, Crown Estate, Bridgend County Borough Council Street Works Department, The Planning Inspectorate Wales, and Bangor University, together with nil returns from Caerphilly County Borough Council Highways Department, Watkin Jones & Son Ltd., and Morgan Est.

Meetings

- 2.13 In addition to the questionnaire, detailed discussions were held with the most relevant stakeholder groups – namely those organisations actually forming part of the Welsh RAWPs membership. The topics covered in the meetings were the same as those covered on the questionnaire (see para 2.9 above and Appendix C) but face-to-face contact allowed these matters to be discussed in more detail. In particular, the following were elaborated upon:

- The workload of the Technical Secretaries and the contribution of the RAWP members, including constraints to obtaining and using data and getting work completed;
- Relationship of the RAWPs / Technical Secretaries to the Unitary Authorities;
- Alternative arrangements for the role of the Technical Secretaries including discussion surrounding the paucity of the minerals planners;
- Current and alternative funding arrangements for the Technical Secretaries and the RAWPs;
- Disseminating the work of the RAWPs;
- The content, review period and status of the RTS;
- The policy framework for dealing with environmental and sustainability aspects including the methodology developed (EMAADS⁷/IMAECA⁸) and used in the RTS;
- The capacity of secondary aggregates and recycled materials to meet increases in demand;

- 2.14 Meetings were held with 32 individuals, representing 12 stakeholder groups as follows:

- British Geological Survey (BGS);
- Current RAWP Technical Secretary and Chair for South Wales;
- Current RAWP Technical Secretary for North Wales;
- English RAWP Technical Secretaries;
- National Park Authorities;
- Quarry Products Association (QPA);
- British Aggregates Association (BAA);
- North Wales Unitary Authorities;
- South Wales Unitary Authorities;
- Welsh Assembly Government;
- Environment Agency, Wales;
- The Countryside Council for Wales.

- 2.15 A meeting was unable to be arranged, within the timescale available, with the diverse range of stakeholders representing the end users of aggregates. Representatives of

⁷ ARUP, (2003) *Establishing a Methodology for Assessing Aggregates Demand and Supply (EMAADS)*. Report for the Welsh Assembly Government.

⁸ ENVIROS CONSULTING LTD., (2005) *Implementing the Methodology for Assessing the Environmental Capacity for Primary Aggregates (IMAECA)*. Report for the Welsh Assembly Government.

those organisations were, however, included on the list of those to whom questionnaires were sent, and were thereby still offered the opportunity to contribute to the research.

Workshops

- 2.16 Two workshops were held (one in Cardiff, South Wales and one in Abergele, North Wales) to offer the wider group of stakeholders the opportunity to comment on the results of the initial research including the views expressed in the meetings with the RAWP members. Additionally, these meetings gave stakeholders the opportunity to make their own suggestions.
- 2.17 At the meetings, Capita Symonds gave a presentation of the results of the research to date. This was followed by two 'breakout' sessions where stakeholders were asked to engage in discussion. The first breakout session considered the current role of the RAWPs and Technical Secretaries and the second breakout session considered suggestions for delivering future policy objectives and suggestions for future procedure.
- 2.18 The Agenda for the Workshops and the Questions provided for the breakout sessions are shown in Appendix D.

Independent Consideration of Alternative Approaches

- 2.19 The final part of the methodology comprised the analysis of suggestions for possible alternative approaches for managing the future supply of aggregates in Wales, as expressed in questionnaire responses and at the meetings and workshops. As part of this work, consideration was also given to suggestions arising from other sources, including a series of parallel research projects in England, funded by CLG.

3. THE MANAGED AGGREGATES SUPPLY SYSTEM IN WALES

Introduction

- 3.1 This chapter provides a brief résumé of the role of the managed aggregate supply system in Wales, as a background to understanding the role of the RAWPs and Technical Secretaries. The aggregates policy frameworks in England and Scotland are also briefly discussed by way of comparison and to inform the consideration of alternative approaches discussed in Chapter 6.
- 3.2 Firstly, some of the key elements of the planning system in each country are briefly outlined below to indicate how the recent over-riding features and changes of those systems have shaped the emerging changes now being seen in planning for aggregates.
- 3.3 The *Planning and Compulsory Purchase Act (2004)* for England and Wales and the *Planning (etc) Scotland Act (2006)* for Scotland brought about a much greater emphasis on integrated, strategic spatial planning, (particularly at the regional level, in the case of England), and this emphasis, together with issues of sustainability has influenced aggregates planning policy in recent years in all three countries.
- 3.4 The *Wales Spatial Plan (2004)*, the *National Planning Framework for Scotland (2004)* and the *Regional Spatial Strategies* in England provide the broad framework for spatial development in these countries and regions and encourage regional and sub-regional priorities for housing and other development to be formulated in conjunction with those for issues such as environmental protection, water resources, agriculture, minerals and waste. A two-way approach is involved, with these strategies and plans being required to inform, as well as take account of other strategies, such as regional economic strategies and those on energy, climate change and the provision of adequate water supplies, aggregates and other minerals to support economic growth.
- 3.5 This two-way approach fits in with the general move away from the ethos of '*predict and provide*' which was central to Government's housing policy and to its guidelines on aggregates provision in the past⁹, to one which, whilst not always explicit in policy, relates to the need to: '*plan, monitor and manage*'. The essential difference between the two approaches is that in the latter case, future supply patterns need not be driven so much by market forces but should also take much greater account of wider sustainability issues. These issues, as they relate to aggregates provision, include consideration of:
- the prudent use of natural resources and the optimum use of alternative materials so as to provide an adequate and steady supply of aggregates to support economic growth;
 - the need to safeguard resources for future generations;
 - the need to achieve realistic landbanks by resolving the likelihood of future working of long dormant sites
 - the 'environmental capacity' of different areas to support aggregates extraction, so as to avoid, as far as possible, the impacts of quarrying on the natural, built and historic environments and on local communities;
 - the 'proximity principle', which seeks to limit transport costs and impacts, including carbon emissions; and
 - the encouragement of good practice in minimising impacts and maximising opportunities to create long term environmental improvements through the way in which mineral sites are worked and subsequently restored.

⁹ Department of the Environment (1989) *Minerals Planning Guidance Note 6: Guidelines for Aggregates Provision (MPG6)*, HMSO, London. The subsequent revision of *MPG6* in 1994 applied only to England, as Wales began to develop its own alternative approaches.

- 3.6 The first three of these issues relate primarily to strategic forward planning and thus are directly relevant to the role of the RAWPs. The fourth item is primarily a development control issue, with which the RAWPs are not directly concerned.

Aggregates Planning Policy in Wales and the Role of the RAWPs

- 3.7 The issues outlined above apply to minerals in general, not just aggregates, and are clearly reflected in the five key principles set out in *Minerals Planning Policy Wales* (December 2004) - *MPPW*. These are as follows:
- A. 'TO PROVIDE POSITIVELY FOR THE WORKING OF MINERAL RESOURCES TO MEET SOCIETY'S NEEDS THROUGH, AS FAR AS PRACTICABLE, THE IDENTIFICATION OF AREAS FOR FUTURE WORKING WHERE THIS CAN BE UNDERTAKEN IN A SUSTAINABLE WAY; AND TO SAFEGUARD DEPOSITS OF MINERALS FROM PERMANENT DEVELOPMENT THAT WOULD PREVENT OR HINDER THEIR SUBSEQUENT EXTRACTION FOR FUTURE GENERATIONS;
 - B. TO PROTECT AREAS OF IMPORTANCE TO THE NATURAL OR BUILT HERITAGE FROM INAPPROPRIATE MINERAL DEVELOPMENT;
 - C. TO REDUCE THE IMPACT OF MINERAL EXTRACTION AND RELATED OPERATIONS DURING THE PERIOD OF WORKING BY, FOR EXAMPLE, ENSURING SENSITIVE WORKING PRACTICES AND IMPROVED OPERATING STANDARDS;
 - D. TO ACHIEVE A HIGH STANDARD OF RESTORATION AND AFTERCARE, AND PROVIDE FOR BENEFICIAL AFTER-USES WHEN MINERAL WORKING HAS CEASED;
 - E. TO ENCOURAGE THE EFFICIENT USE OF MINERALS BY PROMOTING THE APPROPRIATE USE OF HIGH QUALITY MATERIALS AND BY MINIMISING THE PRODUCTION OF WASTE BY MAXIMISING THE POTENTIAL FOR RE-USE AND RECYCLING WHERE ENVIRONMENTALLY ACCEPTABLE'.
- 3.8 The role of the RAWPs is specifically mentioned in *MPPW* in relation to Principle A and Principle E above and in each case relates to the, then, existing role of the RAWPs in providing a regional overview of aggregates supply and demand. For example para 58 states: "*The regional consideration of demand and supply of aggregates is carried out by the two Regional Aggregate Working Parties (RAWPs) for North and South Wales The role of the RAWPs is to examine issues of aggregates provision in each of the two regions in Wales.*"
- 3.9 Further technical advice relating to the role of the RAWPs is given in the guidance note for aggregates - *MTAN1*. That document sets out detailed advice on the mechanisms for delivering the policy for aggregates extraction by mineral planning authorities and the aggregates industry, and describes a very specific future role for the RAWPs which is summarised in *Annex A: RAWPs*. For ease of reference, that annex is reproduced here as Appendix E.
- 3.10 The five main sections in *MTAN1* correspond directly to the five key principles in *MPPW*, as listed above, although the wording used for each principle differs slightly. Of particular, reference to the role of the RAWPs, Principle A is described in terms of the new procedures to be introduced to deal with the supply of aggregates and Principle E is described more simply than in *MPPW*. The wording used in *MTAN1* is as follows:
- A: 'TO PROVIDE AGGREGATE RESOURCES IN A SUSTAINABLE WAY TO MEET SOCIETY'S NEEDS FOR CONSTRUCTION MATERIALS IN LINE WITH THE FOLLOWING OBJECTIVES:
- MAXIMISING THE USE OF SECONDARY AND RECYCLED MATERIALS AND MINERAL WASTE WHERE PRACTICABLE;
 - ENSURING PLANNING PERMISSIONS FOR FUTURE PRIMARY EXTRACTION ARE ESSENTIAL AND PROPERLY PLANNED FOR IN ACCORD WITH THE REGIONAL TECHNICAL STATEMENT;
 - ELIMINATING OVER THE NEXT FIVE YEARS ANY LIKELIHOOD OF FUTURE PRIMARY AGGREGATE EXTRACTION AT HISTORICALLY OBSOLETE AND LONG DORMANT SITES.'
- E: 'TO ENCOURAGE THE EFFICIENT USE OF MINERALS AND MAXIMISING THE POTENTIAL USE OF ALTERNATIVE MATERIALS AS AGGREGATES.'

- 3.11 The role of the RAWPs is described in detail within Sections A and E of MTAN1 and, in para 27, their remit is extended, as follows: “*The Welsh Assembly Government considers it essential that the role of the RAWPs be enhanced to include not only assessments of regional changes in demand but also to explore the regional interpretation of the assessment of environmental capacity and environmental capital, and how these principles may be applied to ensure that the provision of aggregates is sustainable... The increased role of the RAWPs in monitoring demand and assessing regional supply is ... summarised in Annex A*”.
- 3.12 The RAWPs are also very briefly mentioned within Section B, of MTAN1, entitled ‘To prevent unacceptable aggregates extraction from areas of acknowledged landscape, cultural, nature and geological conservation and hydrological importance’. Para 53 of that section states that ‘*the RAWPs should take into account the need to protect these areas from extraction, and the agreement of other areas to meet the regional contribution that the National Parks and AONBs are unable to meet should be discussed and recorded in the Regional Technical Statement.*’ This requirement broadly fits with the extended role of the RAWPs, as introduced above, and as summarised in para. 3.27, below.
- 3.13 Before that extended role can be appreciated, it is useful first to consider the procedures which form part of the key RAWP functions, particularly those relating to:
- Demand Forecasts;
 - Future Aggregates Supply;
 - Landbanks.

Demand Forecasts

- 3.14 As noted above, forecasts of aggregates demand and corresponding regional apportionments for supply were formerly produced for England and Wales and published in Minerals Planning Guidance Note 6 (MPG6, 1989). The subsequent revision of MPG6 in 1994 applied only to England. In the absence of Government guidelines, separate requirements for aggregates provision were made by each of the Welsh RAWPs in 1995^{10,11}
- 3.15 Following devolution, the Welsh Assembly Government decided that the previous practice of basing demand projections on econometric forecasts did not sufficiently meet the principles of sustainable development, and adopted a radical alternative approach. This is reflected in MTAN1 which states, in para 19, that: “*It is considered that the present level of total aggregates demand and consequent production (from both land-won, marine and secondary sources) of about 23 million tonnes in Wales will not increase significantly over the next 5 years. Even taking into account the expected economic growth in Wales it is not anticipated that demand for aggregates will exceed 23-27 million tonnes per year by 2010. Until the Regional Technical Statement is completed this range should be used for planning purposes.*”
- 3.16 MTAN1 also notes (in para’s 18 and 21) that “the RAWPs provide a suitable forum for informed discussions on the provision of aggregates” and that “Demand for aggregates produced in Wales will be closely monitored annually at all-Wales and regional levels by the Assembly in conjunction with the RAWPs and reviewed in the Regional Technical Statements.”

Future Aggregates Supply

- 3.17 MTAN1, para 29 makes the point that “The planning system can influence aggregates supply patterns much more than overall demand which is generally market led. The current pattern of supply is largely a historic residual, and does not necessarily relate to what may be optimal in the 21st century. It will need to gradually change to reflect current notions of sustainability.”

¹⁰ South Wales Working Party on Aggregates (March 1995) *Guidelines for Aggregate Provision*

¹¹ North Wales Working Party on Aggregates (1995) *Guidelines for Aggregate Provision*

- 3.18 Therefore, whilst continued monitoring of the production and distribution of aggregates and of permitted reserves is necessary, an analysis of the environmental capacity within each RAWP region was felt to be necessary, in order to ensure that the future supply of aggregates could be achieved as sustainably as possible. A research project on “*Establishing a Methodology for Assessing Aggregates Demand and Supply (EMAADS)*” was therefore commissioned by the Welsh Assembly Government and undertaken by Arup (2003), in order to address this requirement.
- 3.19 This method advocated a system where each 1km grid square containing more than a given proportion of aggregate resource, should be assessed against twelve criteria or environmental capacity indicators (shown in Appendix F), relating to predefined environmental assets. The method also advised the adoption of a supply based more closely upon population (as a general approximation to demand) within each MPA, as a means of embodying the proximity principle.
- Using the approach developed in EMAADS, a Geographical Information System (GIS) - based resource for was produced for the Welsh Assembly as part of a second research project on “*Implementing the Methodology for Assessing the Environmental Capacity for Primary Aggregates (IMAECA)*”, undertaken by Enviros Consulting Ltd (2005).
- 3.20 The results of IMAECA are displayed in two forms: as twelve segments within each 1km grid square or as a cumulative indicator (a colour of green, orange or red) for all the environmental criteria within each grid square. The green attribution indicates comparatively high environmental capacities to accommodate quarrying, the orange attribution, an average ability and the red attribution, a relatively low ability. The values thus assigned are relative and indicative, not absolute.
- 3.21 In describing the geological resource base of the GIS, eleven categories of aggregates were used which took into account the geological resources from which primary aggregates are currently worked and other geological resources with the potential to be worked as aggregates. These categories of aggregates are also shown in Appendix F.
- 3.22 The Welsh Assembly Government had the option of adjusting the GIS by giving weightings to each environmental capacity indicator though, in practice this was not carried out. The GIS resource then became available to the RAWPs for the preparation of the Regional Technical Statements. The IMAECA method is intended for use at the regional, strategic level and is not intended to be used directly in the preparation of plans and site allocations at MPA level or in dealing with specific planning applications.

Landbanks

- 3.23 Aggregate landbanks have historically comprised the stock of permitted reserves of aggregates, i.e. those which are bound up in planning permissions for the winning and working of minerals. However, as explained in more detail in the Glossary of Terms provided at the end of this report, MTAN1 differentiates between:
- The current landbank – those reserves bound up in planning permissions, but excluding:
 - Dormant reserves (where further approval to recommence working is necessary) – these should be clearly shown as a separate category; and
 - The future landbank – land specifically allocated (in Local Development Plans) for the working of aggregates, as an ‘extended landbank’.
- 3.24 In recognition of issues relating to ‘Environmental Capacity’, MTAN1 advocates that Prohibition Orders are made in respect of dormant permissions where working is unlikely to recommence, in order to achieve a more realistic landbank assessment and to ensure, as far as possible, that ‘unsustainable’ patterns of supply are not perpetuated.
- 3.25 MTAN1 recognises that the aggregates industry requires a viable landbank and recommends in para 49 that: “a minimum 10 year landbank of crushed rock and a minimum 7 year landbank for sand and gravel should therefore maintained during the entire plan period of each development plan... Where landbanks already provide for more than 20 years of aggregates extraction, new allocations in development plans will not be necessary.”

- 3.26 In practice, new requirements for allocations have only been identified in the Regional Technical Statements for MPAs where the current landbank for crushed rock or sand & gravel has been found to be below the amount that would be required to cover the minimum 10 or 7 years plus five years in each case for the period until the next RTS revision (i.e. 15 and 12 years, respectively).

The Enhanced Role of the RAWPs

- 3.27 The enhanced role of the RAWPs is set out clearly in *MTAN1 Annex A* and includes:
- Continuation of the monitoring of primary and secondary aggregates including: the production, distribution (including imports and exports) and available reserves (separately identifying those bound up in active and dormant sites);
 - Increased monitoring of secondary aggregates and recycled materials that could be used as aggregates, including consideration of ways to improve data collection;
 - The assessment of the environmental capacity of MPA areas to meet the demand for aggregates
 - Monitoring of relevant plans and future development programmes to assess the regional demand for aggregates – by inference, where the demand for aggregates is likely to increase;
 - The production of a 5-year Regional Technical Statement;
- 3.28 The 5-year Regional Technical Statement (RTS) is the document which captures and presents the additional data collection and analysis that the RAWPs are expected to undertake. Consultation drafts of the South Wales RTS¹² and North Wales RTS¹³ were published in November 2007 and February 2008, respectively.

Other Aggregates Planning Policy Frameworks: England and Scotland

England

- 3.29 In England, national policy relating to Aggregates is shown within *Minerals Policy Statement 1: Planning and Minerals* (November 2006) – MPS1. This is accompanied by a separate *Planning and Minerals: Practice Guide* which provides additional guidance, such as the required method for landbank calculation. The ethos is fundamentally the same as for Wales, in that everything is underpinned by principles of sustainable development, but the details are different. In particular, England has maintained the concept of national and regional apportionments based on econometric demand forecasting, rather than assuming (as in Wales) that demand will not increase and that, if it does, it will be met by secondary and recycled materials, rather than primary aggregates. The English approach does, however, still embrace a hierarchical ‘top-slicing’ method in which alternative sources of supply are considered before land-won sources. For example, para 1 of the Introduction states that: *“In order to secure the long-term conservation of minerals it is necessary to make the best use of them. This can be achieved by adopting a hierarchical approach to minerals supply, which aims firstly to reduce as far as practicable the quantity of material used and waste generated, then to use as much recycled and secondary material as possible, before finally securing the remainder of material needed through new primary extraction.”*
- 3.30 Annex 1 of MPS1 deals specifically with Aggregates and sets out the following ancillary policy objectives which echo the above concept:
- *“To encourage the use, where practicable, of alternative aggregates in preference to primary aggregate;*

¹² South Wales Regional Aggregates Working Party (2007) Consultation Draft Regional Technical Statement (South Wales)

¹³ North Wales Regional Aggregates Working Party (2007) Consultation Draft Regional Technical Statement (North Wales)

- *To encourage the supply of marine-dredged sand and gravel to the extent that environmentally acceptable sources can be identified and exploited, within the principles of sustainable development;*
 - *To make provision for the remainder of supply to be met from land-won sand and gravel and crushed rock”.*
- 3.31 RAWPs are mentioned specifically in section 3 of Annex 1 (“*Provision for land-won aggregates*”), where it is noted that they provide technical advice to the Department (Communities and Local Government – CLG) on the preparation and annual monitoring of its *National and Regional Guidelines for Aggregates Provision*; and to the Regional Planning Bodies (RPBs) on the sub-regional apportionment of these guidelines to individual MPAs.
- 3.32 The National and Regional Guidelines for England were previously published in MPG6 (in 1989, with respect to both England & Wales, and updated in 1994 but with respect to England only). They have since been further updated as free-standing guidance from the Department in 2003 and most recently in April 2008 (as a consultation document¹⁴), to take account of monitoring results and revised econometric forecasts.
- 3.33 Para 3.2 of MPS1 (Annex 1) states that ‘RPBs should apportion the Regional Guidelines to the local authority level in collaboration with their constituent MPAs, taking account of technical advice from the RAWPs. The apportionment should be subject to sustainability appraisal, incorporating strategic environmental assessment.’
- 3.34 The 2003 update of the National and Regional Guidelines for Aggregates Provision in England, 2001 – 2016, provided more detailed guidance, stating (in Clause 6) that: *“It might be appropriate to carry out an initial sub-regional apportionment on the basis of recent production but to then examine possible alternatives before deciding on a preferred option. The likely environmental impacts of any additional extraction should be assessed in relation to the ability of the aggregate-producing areas concerned to absorb such impacts, especially impacts on areas of international and national landscape or conservation designations, and the impacts on the populations affected”.*
- 3.35 This guidance fundamentally seeks to address the same issues as MTAN1 in Wales, by drawing attention to the need to consider alternative and potentially ‘more sustainable’ future patterns of supply by taking account of issues relating to ‘environmental capacity’ (although that phrase is not actually used). In marked contrast to Wales, however, no specific guidance is given, either in the 2003 or 2008 Guidelines (or in MPS1), as to what methodology should be used to achieve this. As a consequence, individual RPBs in England have pursued their own ways of addressing this issue. An interesting variety of approaches has emerged but, as yet, none of these has generated an alternative pattern of sub-regional apportionment which has been adopted for use in the preparation of Minerals Development Frameworks (the English equivalent, for minerals, of the Welsh Local Development Plans, but prepared for MPA areas rather than individual local authorities).
- 3.36 The minimum recommended lengths of landbanks for aggregates in England are the same as for Wales with *“at least 7 years for sand and gravel and at least 10 years for crushed rock”* (see para 4.1) being stated. No maximum landbank level is given but MPAs are required to make judgments on whether landbanks are ‘excessive’. MPS1 also advises (in para 4.4 of Annex 1) that: *“sites that individual operators agree are unlikely to be worked again should be excluded from the landbank calculation and they should be made subject to prohibition orders to remove the possibility that subsequent changes in ownership could unexpectedly revive development proposals”.* This provision is directly comparable to the policy adopted in Wales.
- 3.37 At para. 4.5 of Annex 1, MPS1 advises that *“where there is a distinct and separate market for a specific type or quality of aggregate, for example high specification aggregate, asphaltting sand, building sand or concreting sand, separate landbank calculations and provisions for these may be appropriate”.* No equivalent policy requirement currently exists in Wales, though this is primarily because of the much greater availability in Wales

¹⁴ <http://www.communities.gov.uk/publications/planningandbuilding/draftaggregatesconsultation>

of a diversity of aggregate types, including high specification aggregate (for skid resistant road surfacing materials).

Scotland

- 3.38 In Scotland, unlike England & Wales, there are no Regional Aggregate Working Parties, and the concept of linking aggregates provision to development needs is very different. National planning policy relating to aggregates (and to all minerals except opencast coal) is set out in *Scottish Planning Policy 4: Planning for Minerals* (September 2006) – SPP4. This notes, in para. 42, that *“Local authority boundaries do not always provide an adequate basis for market definition and provision of supply. The Executive’s view is that the city regions for the four largest cities should form the principal market areas for the provision of construction aggregates. To achieve an adequate supply, structure plan authorities and in due course authorities working together on strategic development plans should provide a landbank of permitted reserves taking into account lead-times and any evidence provided on the contribution from imports, recycled and secondary materials. The landbank should be equivalent to a minimum 10 years extraction at all times for the appropriate part of the city region market area. This requirement will also extend to some adjoining local authorities, particularly in the central belt, where their output contributes to the main market area in the city regions. Elsewhere it will be the responsibility of individual planning authorities to decide on an appropriate 10 year landbank. It is important that stakeholders, including the aggregates industry engage in consideration of landbank issues.”*
- 3.39 With regard to sustainability issues, para. 6 of SPP4 states that “mineral extraction should accord with the principles of sustainable development and environmental justice”. Para. 8 it notes that: “a sustainable approach to mineral extraction should reconcile the need for minerals with concern for the natural and built environment and communities in a manner that:
- *safeguards minerals as far as possible for future use;*
 - *ensures a steady and adequate supply is maintained to meet the needs of society and the economy;*
 - *encourages sensitive working practices during mineral extraction that minimise the environmental and transport impacts and once extraction has ceased, ensure sites are reclaimed to a high standard or enhance the value of the wider environment;*
 - *promotes the use and recycling of secondary materials in development plan policies in addition to those for the release of sites for extraction of primary materials;*
 - *protects international, national and locally designated areas of acknowledged natural or built heritage importance from adverse impacts; and*
 - *minimises the potential adverse impact of minerals extraction on communities”.*
- 3.40 Though broadly similar to the five ‘key principles’ enshrined in the equivalent Welsh policy (MPPW – see para. 3.7, above), and although the concept of avoiding environmental and social impacts through the careful location of quarrying activities is included, an important difference from both England & Wales is that Scottish policy does not attempt to influence the distribution of either supplies or future resources through an apportionment procedure.
- 3.41 The wider framework for spatial planning in Scotland is set out in the second National Planning Framework (January 2008). This provides a statutory basis for Scotland’s spatial development to 2030, setting out strategic development priorities to support the Scottish Government’s central purpose - promoting sustainable economic growth. The Planning etc. (Scotland) Act 2006 amended the Planning (Scotland) Act 1997 and places duties on Ministers to prepare the Framework with the objective of contributing to sustainable development and to review it every 5 years. It also provides for the Framework to be scrutinised by the Scottish Parliament.
- 3.42 In terms of forecasting future demand, the Scottish system utilises figures that are based on the 2003 CLG Guidelines for England but expects that at least 18% of the demand (the level already met in Scotland) will be met from recycled and secondary sources. SPP4 acknowledges that the position regarding alternative materials varies across Scotland,

and notes the potential for the overall figure to possibly increase over time, but again it gives no specific targets or assumptions for these materials for individual local authorities or 'market areas'.

- 3.43 In terms of monitoring actual production, consumption and distribution patterns, the Scottish Executive has liaised with industry (the Quarry Products Association (Scotland) and the British Aggregates Association) to devise and instigate the Scottish Aggregates Survey, in 2005. This was the first survey of its kind in Scotland since 1993 (other than the statutory AMRI surveys for the Office of National Statistics) and was deliberately kept as simple as possible in order to obtain a high rate of response. The survey results were published in 2007 and include a note that *"the intention is, subject to the continued co-operation of the industry, to carry out further Surveys in the future so that trends can be monitored closely. These Surveys are normally undertaken every 4 years to link in with Surveys in England and Wales. However, given the findings emerging from this document, the Scottish Government is minded to bring forward the next Scottish Survey to 2008."*
- 3.44 QPA Scotland has clarified that the survey showed significant shortfalls in some parts of the country, with the landbank in some places reduced to five to six years. In view of the long gap since previous surveys, this has prompted the need for more regular monitoring in future and for a follow-up survey sooner than planned to see if the situation is stable or deteriorating.

Summary

- 3.45 Wales appears to have made much greater progress than either England or Scotland in terms of developing a *prescribed methodology* for addressing sustainability issues within aggregates planning policy and practice. Although minerals policies in all three countries have embraced the concept of sustainable development, it is only Wales which has built this into a specific methodology that seeks to influence patterns of supply through the process of sub-regional apportionment. Uniquely (within Great Britain, at least), that procedure is intended to take account of the environmental capacity of source areas to accommodate the impacts of quarrying, whilst also seeking to match the spatial patterns of supply and demand in order to minimise transportation. The extent to which that procedure is yet succeeding in its intentions is discussed later in this report.

4. THE ROLE OF THE RAWPS IN THE MANAGED AGGREGATE SUPPLY SYSTEM IN WALES

- 4.1 This chapter focuses on **Objectives 1A-D** (as numbered in Table 2.1, above), relating to the role of the RAWPs in the provision of a managed aggregates supply system for Wales. It summarises the findings on this issue obtained from questionnaire responses and, more especially, from meetings with key stakeholder groups and workshops involving a cross section of different groups.

The Role of the RAWPs in Delivering Policy Objectives (Objective 1A)

- 4.2 As explained in Chapter 3, the RAWPs are primarily charged with contributing to two of the five Key Principles (policy objectives) that are set out in MPPW and (with slightly different wording) in MTAN1. Within those objectives, the role of the RAWPs is, essentially, to **support the managed aggregate supply system in Wales** by monitoring supply and demand; and, in line with the 'Enhanced Role' set out in MTAN1, taking responsibility for **the production and implementation of Regional Technical Statements**. The text which follows summarises the views obtained from stakeholders on these two topics. A more detailed, objective assessment of the extent to which the RAWPs have fulfilled the specific objectives set out in MTAN1 is provided separately in Chapter 5.

Supporting the Managed Aggregates Supply System in Wales

- 4.3 There was a consensus among all stakeholders that the managed aggregate supply system in Wales is both necessary and working well, and also that the role of the RAWPs within that system has been (and continues to be) vital. There was also a common view that the greater consideration that has been given in Wales to environmental capacity and the proximity principle is a very positive step. The system was thought by most stakeholders to be moving towards improved sustainability, a better ability to represent the views of the local communities, reduced environmental effects and potentially reduced costs - despite some concerns over the details of how this is being done.
- 4.4 Although some stakeholders were able to identify areas for further improvement, and noted that the RTS process, in particular, still had to be fully tested over the coming years, overall it was felt that good progress has been made and that the system provides a robust basis for the forward planning of future aggregates provision in Wales. It was felt by some stakeholders that, although the differentiation between the Welsh and English systems was appropriate and represented good progress in the right direction, the two systems should not be allowed to become too decoupled.
- 4.5 The most common area of concern among stakeholders regarding the current system is that it is very difficult for individual Unitary Authorities, with limited geographical areas and limited minerals planning staff, to engage properly with the concept of strategic spatial planning. Many of those questioned (including both industry and planners) felt that greater emphasis was required on minerals planning at the regional and (especially) sub-regional level. That function is provided, to some extent, by the RAWPs through the preparation of Regional Technical Statements (see below). However, there appears to be scope for additional improvements in this area, as discussed in Chapter 6, below.
- 4.6 Other, more detailed concerns relating to the existing system were that there are sometimes localised supply shortages for certain aggregate products (e.g. specific single sized aggregates required for road surfacing maintenance at certain times of the year), necessitating longer than usual haulage distances. Overall, however, no major supply problems have been reported, lending further support to the notion that the current system is working reasonably well, overall.

Production of the Regional Technical Statements

- 4.7 Regional Technical Statements have now been produced in both North Wales and South Wales. This work has been led by the RAWP technical secretaries but has involved substantial input from the RAWPs themselves, primarily through the work of the RTS Sub-Groups.

- 4.8 It was noted by most of those interviewed in this study, including the Technical Secretaries, that the process of preparing these documents was both difficult and time consuming. This was not least because of the need to develop from scratch a technically sound report template on which future RTS reviews can be based, and because of the need to set up advisory groups and to consult with elected members who had no previous experience in the process.
- 4.9 It was felt by some stakeholders that delivering the RTS within such a tight timescale and without waiting for the most up to date data to be produced may have compromised its usefulness.
- 4.10 The clarity of the data within each RTS is obviously important, as is the clarity of the overall structure of these documents, the explanation of the issues dealt with, the methodologies used and the relevance of the various discussions and tables to the final outcome. On all of these counts, representatives from both the industry and MPAs felt that both the North Wales and South Wales statements leave considerable room for improvement.
- 4.11 Regarding meetings held during production of the RTS, it was noted that the members' meeting seemed not to be well attended perhaps due to lack of time or inclination to deal with minerals. Local action groups were also thought not to be well versed in minerals planning issues. And on a wider scale the RTS was thought not to be well understood.
- 4.12 Not all of the RAWP members were involved in the sub-group for RTS, and while it was understood that not all could be involved due to the need for the meetings to be manageable, there was a perceived lack of transparency. It was felt that some dissemination of information on how consensus was reached on the form and content of each RTS would have been useful. A suggestion was made that an interim report on progress and major decisions made would have been useful and that this should be considered for the review of the RTS in five years' time.

Implementation of the Regional Technical Statements

- 4.13 Notwithstanding these difficulties, most if not all interviewees considered that the RTS process was a good step in the right direction and that the outcome was sensible. As noted earlier, however, very few MPAs have yet been required (through the RTS process) to consider providing allocations for future aggregates provision. Some stakeholders have suggested that the lack of concern by MPAs in other areas may simply reflect the fact that they have not, at this stage, been required to do make such provisions. In almost all of those which have (specifically Wrexham, Blaenau Gwent, Torfaen and Newport), concerns have been expressed regarding the requirements they have been asked to meet. In all of these cases there has been no recent history of production of the materials now being sought, whether these be crushed rock (in the case of Wrexham) or both crushed rock and sand & gravel (in the other areas). MPA officers in these areas with whom interviews or workshop discussions were held considered that, whilst supporting the concept of the proximity principle, there are practical difficulties in finding and allocating suitable sites within small unitary authorities that do not have a recent history of quarrying activity.
- 4.14 In the case of Wrexham, the logic of re-establishing hard rock quarries in an area that is so close to the main source of active limestone quarrying in North Wales, in neighbouring Flintshire, has been questioned. In the other three adjoining MPAs within South Wales, the main concerns relate to the limited geographical areas involved, the limited availability of suitable geological outcrops (especially in Newport), and a lack of knowledge within those authorities regarding potentially suitable areas to be considered for allocation, taking account of geological, environmental and economic factors. To some extent, these concerns are no more than would be expected from the introduction of a new system. But they may also be key to the testing of that system.
- 4.15 Despite the overall positive progress that has been made, a number of uncertainties still remained after the RTS consultation periods ended. In particular, it was not clear to all stakeholders what status the RTS documents have, in planning terms (i.e. guidance or policy?); who they are 'owned' by (the RAWPs, the MPAs or WAG?); and how feedback from the consultation process was (or should have been) dealt with. With regard to the first of these points it was noted that the RTS documents do not hold the same status as

the equivalent documents for waste^{15,16,17} and, unlike the waste plans, have not been subject to a Sustainability Appraisal or Strategic Environmental Assessment. It was acknowledged however that there were both pros and cons to the notion of the RTS having policy status. On the positive side this might make it easier for MPA officers to 'sell' the idea to their Members and thus to implement the RTS requirements. On the negative side, it could make the documents too inflexible.

- 4.16 There were also uncertainties, and reports of inaccurate perceptions, regarding the issue of safeguarding resources. Both RTS documents have recommended the safeguarding of resources in all MPA areas, including the National Parks, raising unfounded concerns among some that this necessarily implied there would be future quarrying in those areas. In addition there was concern about how to go about safeguarding and it was felt that the RAWPs, through the Technical Secretary, might be able to provide advice on this.
- 4.17 Some concerns were expressed regarding the potential conflicts between the RTS apportionment process and higher level policy within MPPW, which requires that mineral development within National Parks and Areas of Outstanding Natural Beauty should only take place in exceptional circumstances. In detail, the Regional Technical Statements have taken such conflicts into account and, in accordance with MTAN1, have noted that allocations for future workings would not be appropriate within National Parks. Where conflicts exist as a result of this, the RTS recommendations advocate liaison between MPAs and with industry to achieve a gradual transfer of apportionments from National Parks to neighbouring areas. Some stakeholders remain concerned that there has been little perceived consideration of the effect of this on employment levels in existing supply areas that fall within National Parks (specifically the Pembrokeshire Coast National Park). A related concern is that there seems to have been no consideration of the potential impacts of supplies from adjoining areas having (in some cases) to travel through the National Parks (specifically the Brecon Beacons) in order to reach their markets. Further work may be needed to weigh up these relative impacts.
- 4.18 Regarding other details of implementing the IMAECA concept, some stakeholders observed that, if the RTS relies (to some extent) on the incorporation of environmental capacity considerations as justification for not being subjected to Strategic Environmental Assessment or Sustainability Appraisal, and if those environmental capacity findings have not then influenced the RTS recommendations for future apportionment (as seems to have been the case – see para. 5.37, below), then development plans which are based on those recommendations might be rejected by the Planning Inspectorate as being 'unsound'. In practice, this is only a concern, at present, for those MPAs which have been required to make allocations. The question does, however, need to be considered more widely, long before the first review of the RTS takes place.
- 4.19 Some stakeholders (particularly industry) noted that, if the thrust of implementing the EMAADS and IMAECA research findings were to involve a gradual move towards a greater number of smaller quarries serving local needs, there are additional sustainability implications that need taking into account. These include the notion that existing larger quarries may be generally more efficient in producing aggregate than smaller new ones when whole life costings, energy consumption and transport implications are taken into account, and that they may also be more acceptable to the local communities involved. These are all issues which need further quantification. Decisions will also need to be made regarding the relative weighting of different sustainability gains and losses when comparing different options. A perceived weakness of the existing system is that all criteria have equal weight. Another is that the existence of a quarry within a particular area is classed as a negative indicator of the environmental capacity of that area to accommodate further quarrying. This conflicts with the general preference within minerals planning for extensions to existing sites rather than the initiation of quarrying in new 'greenfield' sites.

¹⁵ North Wales Regional Waste Group (2004) *North Wales Regional Waste Plan: November 2003-2013*. Plan developed for the Welsh Assembly Government. Coordinating Authority; Denbighshire County Council.

¹⁶ South East Wales Regional Waste Group (2004) *South East Wales Regional Waste Plan*. Plan developed for the Welsh Assembly Government. Coordinating Authority; Caerphilly County Borough Council.

¹⁷ South West Wales Regional Waste Group (2003) *Regional Waste Plan for the South West Wales Region*. Plan developed for the Welsh Assembly Government. Coordinating Authority; Neath Port Talbot County Borough Council.

Other Outcomes to Which the RAWPs have Contributed (Objective 1B)

- 4.20 The main outcomes to which the RAWPs have contributed, other than the production of the Regional Technical Statements, are the regular series of annual reports summarising a growing range of supply and demand statistics. Stakeholders generally thought that these reports contained very valuable information and were produced as fast as the data collection circumstances would allow (given the unavoidable time lag between the generation of data by operating companies, the collection of that data by MPAs and the subsequent collation, analysis and publication by the RAWPs).
- 4.21 Some interviewees suggested that greater consistency might be achievable between the two RAWPs in the presentation of some of the data, but greater concerns were expressed with regard to the perceived inaccuracy and inconsistency of the data itself (i.e. the figures supplied to the RAWPs for analysis). Some groups of stakeholders recognised this as being intrinsic to the type of data involved (especially regarding the assessment of reserves, due to a combination of geological uncertainties and operator judgements). Others suggested that the reserves figures were sometimes adjusted by operators to suit their requirements at different times, though no evidence was offered to substantiate this.
- 4.22 Some of the stakeholders suggested that the RAWP annual reports could usefully be expanded to incorporate reviews of other outcomes to which the RAWPs have contributed (such as progress towards the production, or revision, of the five yearly Regional Technical Statements).

The Scope of the RAWPs' Membership (Objective 1C)

- 4.23 The current membership of each of the RAWPs is drawn from officers of all MPAs within the region together with representatives of the aggregate producers, the recycling industry, the British Geological Survey, Environment Agency Wales, the Countryside Council for Wales, the Welsh Assembly Government, the Department of Communities and Local Government (in England), and other Government Departments. Stakeholders generally considered the balance of membership to be about right. The potential for other groups to be included was discussed but, with the exception of the need for end users of aggregates (such as the House Builders Federation and the County Surveyors' Society) to be represented, it was generally agreed that this would be unnecessary (not least because of the need to keep the RAWP meetings to a manageable size and to keep them focused on technical, rather than political, issues).
- 4.24 Concerns were expressed, however, that many individuals and organisations that work within or are affected by the workings of minerals planning system, including development control planners and those who use or transport aggregates, were not aware of the RAWPs, or of how their functions could affect them. This was clearly reflected in the small number of responses to the questionnaire survey (and to the recent consultations on the draft RTS documents) and might simply be due to the fact that the system is working well. If it were not, and if construction projects were being delayed or made more expensive by a shortage of aggregate production, there would almost certainly be much wider concerns and calls for the system to be either radically improved or replaced with something better. That is not the case.
- 4.25 Whilst awareness of the RAWPs could be improved by widening their membership, a more practical way of achieving the same thing would be to disseminate information about their work to a wider audience. It was suggested that this might usefully include a "Rough Guide to the RAWPs" style of publication which explained what they do, how the system works and who to contact in the event of any problems occurring which the RAWPs might be able to address. It was widely agreed that this would be particularly helpful to those who have just joined, or are thinking of joining, one of the RAWPs.
- 4.26 Links with the English RAWPs appear to be better in the north than in the south, perhaps because there are much higher levels of 'cross-border' aggregate movements between North Wales and North West England, than is the case between South Wales and South West England. The North Wales RAWP has traditionally invited the North West RAWP Technical Secretary as a member, but similar arrangements do not currently apply in South Wales. It was noted by some that this might usefully be changed in future, in view

of the potential for cross-border supply to become more significant between Monmouthshire and Gloucestershire/Somerset.

- 4.27 Stakeholders all agreed that the existing arrangement of having two RAWPs in Wales (North and South) is cost-effective and that two RAWPs rather than one was appropriate for delivery of policy objectives, considering the very different supply and demand patterns in the two regions. Having more RAWPs (based perhaps on Waste Policy regions or other geographical divisions) was also not considered likely to be successful, not least because a change of boundaries would interrupt the sequence of monitoring data, but also because it would compound the existing difficulties of finding Technical Secretaries and Chairmen with the right expertise and experience who are willing to take on these roles.
- 4.28 Regarding the way in which RAWP meetings are conducted, stakeholders noted that these are generally well attended and that good contributions are made, although some voices are inevitably heard more often than others. This was thought to be because the meetings were of a very technical nature and invariably build on discussions from previous meetings. Without any formal introduction to the proceedings and functions of the RAWPs, it can be difficult for newcomers to make significant contributions.
- 4.29 It was generally felt that the meetings are very successful in achieving consensus on important topics through discussion and exchange of ideas and that, through skilful chairmanship, there was little need for a voting system in reaching such agreements. It was noted that there is currently no constitution for the RAWP itself but that the RTS Member Forum in each RAWP had a Memorandum of Agreement which contained a constitution for those sub-groups.
- 4.30 Many stakeholders noted that an important function of the RAWP meetings, although subsidiary to the main tasks, was the way in which they provided informal learning experiences, particularly by hearing presentations on ongoing, planned and completed research in the field of aggregates provision, minerals policy development and controlling the environmental impacts of quarrying. Several members felt that these sessions often amounted to CPD (Continuing Professional Development) opportunities.

The Scope of the RAWPs' Designated Functions (Objective 1D)

- 4.31 The stakeholders contacted in this study were asked to consider the designated functions of the RAWPs, as set out in MTAN1, Annex A. They were also asked to consider the current terms of reference of the Technical Secretaries.
- 4.32 In general, all of those consulted agreed that the current terms of reference were both comprehensive and appropriate. No additions or changes were suggested regarding the overall remit of the RAWPs, but a number of stakeholders were concerned about their increased 'policy providing' role and the potential lack of enforcement capabilities that the RAWPs have in this regard. This is a reference to the recommendations made in the Regional Technical Statements. Although the RTS documents are intended to provide information rather than either 'guidance' or 'policy' the distinction is somewhat blurred and there is uncertainty regarding who should be responsible for enforcing those recommendations – the RAWPs, the MPAs or the Assembly.
- 4.33 A number of stakeholders thought that there was scope for expanding the remit of the Technical Secretaries further (see below and in Chapter 6 for further discussion on this).
- 4.34 It was also noted that many of the Terms of Reference for the Technical Secretaries related to their roles in producing the Regional Technical Statements. Whilst this was appropriate, some stakeholders suggested that it would be sensible to keep those terms under review, in the light of the RTS outcomes and recommendations, and that the terms may need to be expanded to include coordination and dissemination of news on the implementation and subsequent revision of the RTS (progress, results and supporting research) on an annual basis.
- 4.35 An additional task that stakeholders considered the Technical Secretary might usefully be required to undertake is the dissemination of information on emerging European Directives and the Government's implementation policy, for example the response to the Mining Waste Directive (2006/21/EC).

Collection of Data on Secondary and Recycled Aggregates

- 4.36 A more detailed discussion of the data collection function of the RAWPs is provided in Chapter 5, below, but particular comments are appropriate here on the specific issue of collecting data on secondary and recycled aggregates. As revealed by observations within the Regional Technical Statements, both RAWPs have faced difficulties in this area. These reflect the problems encountered by those attempting to undertake the surveys and the poor rate of response obtained. The problems are compounded by the effects of survey fatigue, reflecting the multiplicity of different surveys and reporting requirements.
- 4.37 It is also noted that some of the designated RAWP functions in this regard involve elements of unnecessary duplication and some confusion in terminology, and therefore may need to be rationalised. In particular, there is overlap between the functions designated in Table 2.1 of this report as Criteria 4, 5, 9, 10, 11 and 17.

Potential for providing technical mineral advice to MPAs

- 4.38 The current Technical Secretaries in Wales are regularly contacted by MPA officers as a source of information, experience and expertise. It was widely commented that the current Technical Secretaries know their 'patch' well and that there is good cooperative working because of the personalities involved. Stakeholders were asked to consider whether this role as a provider of technical advice and as an 'orchestrator' of cooperative working should be formally recognised in the terms of reference, and perhaps expanded, if the job allowed, to provide MPAs with more specific input on strategic mineral planning issues. These suggestions were widely supported, although it was recognised that these, and other additions to the role, would only be feasible if additional contract hours were made available. Developing these ideas further, some stakeholders considered that the Technical Secretaries should become more proactive in communicating with local planners rather than just responding to queries as and when they arise. They suggested that this should incorporate a formal feedback system to allow MPA experience on the implementation of the RTS to be collated annually, as a contribution towards the five-yearly RTS review process.

5. PERFORMANCE EVALUATION

- 5.1 This chapter focuses on **Objectives 2A-C**, as numbered in Table 2.1, above, and provides an objective assessment of the existing and past performance of the RAWPs and their Technical Secretaries, based on measurable criteria. It includes:
- an objective assessment of the performance of the RAWPs (para's 5.3 to 5.50);
 - an objective assessment of the effectiveness of the Technical Secretaries (para's 5.52 to 5.66); and
 - a brief section on the costs associated with the RAWPs and the role of the Technical Secretaries (para's 5.67 to 5.71);
- 5.2 The following chapter complements these findings by providing a more qualitative (and largely subjective) analysis of the views of the Stakeholders concerning the role of the RAWPs in contributing to the managed aggregates supply system in Wales.

The Performance of the RAWPs (Objective 2A)

Measurable Criteria

- 5.3 The project Specification requires the performance of the RAWPs to be measured against the criteria set out in Table 2.2 in Chapter 2, derived directly from the functions listed in MTAN1. As previously noted, however, that document was not published until December 2004 and the effectiveness of the RAWPs before that date can only be judged against the more limited functions of the RAWPs prior to 2005, as listed in the North and South Wales RAWP Reports for 2003 and shown in Table 2.3 in Chapter 2. These points are considered separately within the summary at the end of this section.
- 5.4 In the text which follows, short summaries are provided to explain the extent to which the North Wales RAWP and South Wales RAWP have met each of the evaluation criteria, and therefore, how well they have been undertaking each of their prescribed functions. The supporting evidence (referencing particular data or text within the RAWP Annual Reports and the RTS) can be found in Appendix G.
- 5.5 To avoid confusion, the Glossary at the end of this report provides definitions of the various technical terms (such as 'reserves', 'landbanks', 'primary aggregates' and 'secondary aggregates') that are frequently used in relation to RAWP activities.

Criterion 1 – To continue to monitor production of primary and secondary aggregates

- 5.6 In their Annual Reports, both the North Wales RAWP and South Wales RAWP show primary aggregate production (measured by proxy using sales tonnages) by rock-type, end-use and source MPA. The South Wales RAWP reports also show a breakdown of the crushed rock and sand & gravel tonnages for each MPA. These are collated from information produced by the constituent MPAs, which in turn are derived from information supplied to them by industry.
- 5.7 Both RAWPs have attempted to present data on the production of secondary aggregates. However this data has been of limited use due to the lack of survey responses, leading to issues of confidentiality in reporting (see under Criterion 5, at para. 5.17 below, for further discussion on this).

Criterion 2 - To continue to monitor the distribution of primary and secondary aggregates including imports and exports of aggregates.

- 5.8 Data on the distribution of sales destinations for primary aggregates is obtained once every four years as part of the Aggregate Minerals (AM) surveys for England & Wales, collated by the British Geological Survey (BGS). Although MPAs and the Assembly would prefer to see more frequent and more detailed information being reported, in practice this has to be limited to what the industry is able and willing to provide.

- 5.9 In the AM survey for 2005¹⁸ South Wales was divided into two sub-regions and North Wales was also divided into two sub-regions. For the first time, this gave some broad understanding on the internal flows of aggregates within the regions although on the whole these are limited, compared to the flow of exports from certain MPAs. With the exception of specialist aggregates and value-added products, industry advises that the majority of aggregates are used within a maximum of 50km of their source.
- 5.10 As well as discussing distribution within the regions to a limited extent within their annual reports, both RAWPs dedicate sections within their Regional Technical Statements to 'inter-regional dependency'. Other than long-haul distribution of high specification aggregates (Pennant Sandstones) to England, 'inter-regional' flows of aggregate are minimal in South Wales. Sales tonnages of exports are available, by destination and rock-type. As noted in para 21 of MTAN1, most of the English demand for Welsh aggregates is from the North West Region and consequently, the North Wales RAWP has taken extra care in considering their current markets in North West England and sales tonnages of exports are available, by destination and rock-type.
- 5.11 Imports to both the South Wales and North Wales RAWP regions are small and data on these is therefore limited and variable.
- 5.12 Very little reliable information is available regarding the sales distribution of secondary aggregates produced within Wales.

Criterion 3 - To continue to collect data on primary aggregates reserves at regional and mineral planning authority levels.

- 5.13 Both RAWPs have collected data on primary aggregate reserves at regional and MPA levels, as demonstrated in the Annual RAWP Reports. Tonnages of reserves for sand and gravel (including marine-dredged) and crushed rock are reported annually. As explained in the South Wales RTS, it is important to recognise that figures reported are collated from annual returns made to them by mineral operators and that, although companies are asked to complete a specific reserve figure every fourth year, in connection with the AM ('Aggregate Minerals') surveys, in intermediate years they can opt to use a calculation based on the previous reserve figure, minus subsequent production (and plus any intervening new permissions). In a small minority of the sites, where no reserve figures are submitted by the operators, the MPAs themselves may have to calculate the permitted reserves in a similar manner. The RTS also notes that companies have different ways of calculating reserves and that the figures provided may not always have been reassessed professionally for some time. Even where carried out thoroughly, the interpretation of variations in a deposits and their suitability for various end uses may differ from site to site and time to time. This is especially important when considering materials to meet the demand for high specification requirements.
- 5.14 Planning applications for primary aggregates extraction are also monitored and reported annually by both RAWPs.

Criterion 4 - To monitor the generation of all wastes that have potential for use as aggregates

- 5.15 At the time of publication of the most recently available Annual Reports, only a limited amount of data concerning waste with a potential aggregate end-use had been collected and in any case the volumes, arisings and locations of this material are often highly uncertain. In the Annual RAWP Reports, only the generation of road planings (see Glossary) are reported directly.
- 5.16 The RTS documents (see Criterion 12 below) provide a discussion of the available waste materials in each region and, where available, refer to other reports and data sources where these exist (see Appendix A for a listing of these). The waste materials identified by both RAWPs appear to provide an accurate reflection of those that are available within

¹⁸ Collation of the results of the 2005 Aggregate Minerals Survey for England and Wales. British Geological Survey for the Department of Communities and Local Government (2007), referred to as National Collation, 2005

each region, representing the industries and mineral wastes present and the likelihood of these sources increasing or decreasing in the future.

Criterion 5 - To monitor the generation, re-use and recycling of secondary materials and recycled aggregates from construction and demolition waste.

- 5.17 The RTS for each RAWP presents data from other sources (as listed in Appendix A) that show the arisings and re-use of secondary materials of various types and recycled aggregates from construction, demolition and excavation wastes (CD&EW) – see Glossary for full definitions. Both RTS documents present a useful qualitative summary of the position in their respective areas, but also highlight the questionable reliability of the quantitative data. In the case of CD&EW materials this is due to the very poor levels of response to the most recent 2005 survey (Faber Maunsell, 2007) which, in terms of operational sites, amounted to only 15%. This, in turn, is attributed to a large number of reasons relating to the nature of the industry and the non-statutory and irregular nature of the surveys. The outcome of that survey contrasts markedly with that of a concurrent C&D survey for Wales by the Environment Agency, which received a 70% rate of response. However, as noted in the Faber Maunsell report, the very fact that such surveys are duplicated by different regulatory bodies compounds the problem through the effects of survey fatigue. To overcome this problem there is clearly a need for greater integration of different surveys and, ideally, for these to be undertaken on a regular basis as a statutory requirement. Research may be needed to develop a preferred approach, based on an understanding of the numerous overlapping needs involved.

Criterion 6 - To monitor UDPs and future development programmes and major proposals to assess the regional demand for aggregates and determine potential areas where there could be a shortfall of supply

- 5.18 Both RAWPs monitor and record the annual progress of Unitary Development Plans (UDPs) within their Annual Reports. This Plan review combined with the 'events of interest' chapters (reporting current and upcoming construction activities in each MPA area), which may impact on the local demand for aggregate, help to highlight any likely potential shortfalls in future supply.

Criterion 7 - To assess the environmental capacity of MPA areas to meet the demand for aggregates.

- 5.19 Both RAWPs have used the IMAECA method (see Chapter 3) to assess the relative environmental capacity of their respective regions to support aggregates extraction.
- 5.20 The North Wales RAWP used IMAECA to provide qualitative descriptions for each MPA of the environmental capacity of the potential sand & gravel resource areas and the potential crushed rock resource areas, respectively (with a subdivision into different broad rock types, where appropriate). These descriptions were then reported in Appendix 16 of the RTS.
- 5.21 The South Wales RAWP used IMAECA in a slightly different way, to describe the potential for each of the main primary aggregate resource types to accommodate future quarrying, rather than specifically describing the environmental capacity of each MPA. As in North Wales, the findings are reported as qualitative descriptions within Appendix 16 of the RTS.

Criterion 8 - To assess the reserves of primary aggregates in active and dormant sites and the likelihood of dormant sites being reactivated.

- 5.22 Both RAWPs differentiate in their Annual Reports between reserves within dormant and active sites (see Glossary for definitions). The most recent reports additionally quote data for sites which are 'inactive' but not 'dormant' (i.e. those which have modern planning conditions but which have not been worked that year).
- 5.23 With regard to the likelihood or otherwise of dormant sites being reactivated, the South Wales RAWP reports for 2004 to 2006 all note that "A survey of inactive/dormant sites to ascertain the likelihood of reactivation was carried out in 2005. A number of criteria were used to determine whether or not the sites may usefully be ignored for the purposes of defining an active landbank. The results indicate that there were 128 million tonnes of

reserves in this category of which 47 million tonnes (37%) could be considered unlikely to reactivate. These results will be considered further as part of the RTS process.” There is no mention in these reports, or in the South Wales RTS, of Prohibition Orders having yet been used to eliminate these permissions.

- 5.24 In North Wales, the 2006 RAWP report notes that “the majority of permitted reserves of crushed rock for which returns have been made are contained in active sites (84%). In Flintshire 17 Prohibition Orders have been confirmed by the Welsh Assembly Government, mainly for limestone and silica stone working. No reserve has ever been attributed to the sites. However, based on the area of the permissions it has been estimated that there was a potential reserve of at least 197.1 million tonnes. In Gwynedd and Snowdonia National Park, Prohibition Notices have also been served and confirmed in recent years. This has significantly reduced the amount of material contained in dormant sites”.

Criterion 9 - To assess the use of secondary and recycled aggregates and consider ways to improve data collection and to increase their use to replace primary resources

- 5.25 The recently produced RTS documents have provided analyses of available data from various sources at the regional level concerning the use of secondary and recycled aggregates (analysis at a sub-regional level being hindered by confidentiality issues). Usage (in tonnage sales) of the following materials as aggregates is reported:

- Construction, Demolition and Excavation Waste;
- Iron and Steel Slags;
- Pulverised Fuel Ash / Furnace Bottom Ash;
- Rail Ballast;
- Clay;
- Road Planings;
- Slate, Colliery Limestone;
- Pre-cast Concrete;
- Port and Harbour Dredgings.

- 5.26 No methods to improve data collection are recommended by either RAWP. Both RAWPs consider, at least in respect of CD&EW, that *‘in the absence of a requirement to make statutory returns of quantities and locations, it is difficult to envisage mechanisms by which data can be improved. The lack of vital data presently inhibits robust attempts at monitoring relevant MTAN1 guidelines’* (see para 3.21, bullet 1 of South Wales RTS and para 3.18 of North Wales RAWP).

Criterion 10 - To assess the provision/capacity within each unitary authority area to recycle construction and demolition waste, identifying scope to improve the recycling and reuse of aggregates by examining the extent of landfill disposal (and use on exempt sites) and locations of recycling facilities.

- 5.27 Both RAWPs assess the current provision of recycling facilities and output materials in their Annual Reports, making reference, where appropriate, to external research reports. However, both documents lack evidence of any specific consideration of the future capacity of MPAs for the development of further recycling facilities or the expansion of those already in place. As it is stated in the South Wales RTS (para 3.15) *‘One particular issue is the availability of suitable sites for recycling CD&EW wastes. These are understood to be unevenly distributed through the region but without relevant data on arisings, utilisation, capacity and location the position is unclear. This is an area which requires scrutiny by MPAs within the next 5 years’*. The North Wales RTS make the point that much of the CD&EW waste recycled in NE Wales (where the bulk of the material occurs) is done so by companies operating recycling plant over the border in NW England and indeed, the extent to which such materials are also recycled in Merseyside and Greater Manchester is likely to affect the demand for primary aggregates from North Wales.

Criterion 11 - To assess the arisings of construction and demolition waste, including road planings and their reuse and recovery as aggregates

- 5.28 Both RAWPs provide details of road planings (see Glossary for definition) in their annual reports and the issue is also addressed in their respective RTS documents. The South Wales RAWP also specifically comments on work with a NGO to encourage the use of road planings for a higher-end after use (South Wales RAWP Annual Report 2003).
- 5.29 Data on other CD&EW is sourced from other reports where it is available (see sections above).

Criterion 12 - To provide a 5 yearly Regional Technical Statement (within 18 months of the completion of the study of environmental capacity in Wales.

- 5.30 Both RAWPs have prepared Regional Technical Statements (RTS). The consultation draft RTS for South Wales was completed, with assistance from the North Wales Technical Secretary, and issued for public consultation via the component MPAs, in late November 2007. The draft RTS for North Wales was issued for consultation in February 2008. In both cases, the target of completing the documents within 18 months of the completion of the environmental capacity study (i.e. the IMAECA report, published in February 2005) was missed by a considerable margin.
- 5.31 As explained in more detail in the qualitative review presented in the next chapter, the process of preparing these documents was, in the absence of any previous model to work from, rather difficult and time consuming. There was also a need for everyone involved in the process to consider how the RTS concept and the precise wording within the final documents will influence future development within the region and how it will affect them as stakeholders in that process. This point is clearly reflected in the number of major revisions and additions that were made to the draft South Wales RTS, before it was issued for consultation in November 2007. The original draft was produced in March 2005 (the RTS process having begun two months earlier in January 2005) and at least five subsequent major revisions of the document were prepared over the subsequent 32 month period.
- 5.32 In North Wales, where the process of RTS preparation began later (in November 2005), certain lessons were able to be learned from the experience in South Wales, and the document was issued for consultation after a total of 27 months, in February 2008. This, however, was 36 months after the completion of the IMAECA study.

Criterion 13 – set out the results of the regional assessment of the environmental capacity of each MPA to contribute to an adequate supply of primary aggregates

- 5.33 As noted above in relation to Criterion 7, both RAWPs have undertaken an assessment of the environmental capacity of their respective regions to contribute to the supply of primary aggregates, using the IMAECA system. The outcomes of these assessments are reported in the respective Regional Technical Statements. In both cases, the way the findings are reported and used is extremely 'broad brush', despite the availability of detailed results for each kilometre grid square. However, this merely reflects the fact that the IMAECA system was only ever intended to provide a very broad assessment of the environmental capacity of MPA or resource outcrop areas, and not as a means of pinpointing the preferred location of individual site allocations for future mineral working. As discussed in more detail under Criterion 14, below, the results have been used in only a qualitative way and have not influenced any quantitative recommendations within either RTS regarding future apportionments.

Criterion 14 - To provide a strategy for the provision of aggregates in the region in accord with that regional assessment, with allocations of future aggregates provision for each mineral planning authority area to provide a strategic basis for future development plans.

- 5.34 The Regional Technical Statements for both North Wales and South Wales have considered the need for each constituent MPA to make site allocations in their Local Development Plans for future aggregates provision. Apportionments for each MPA were calculated using both the conventional approach (based on historical production ratios – 'METHOD A') and using the 'per capita' approach as a means of reflecting the 'proximity principle' (using the distribution of population as a proxy for the distribution of demand,

and assuming an average level of consumption per head) – METHOD B. Where appropriate – i.e. where the current landbank for crushed rock and/or sand & gravel in a particular MPA was found to be less than the corresponding apportionment figure obtained by Method B for the 15 year period covered by the RTS, recommendations were made in the RTS for the necessary site allocations (except in National Parks where MTAN1 policy notes that such allocations are inappropriate).

- 5.35 In practice, the outcome of this exercise in almost all MPAs was that no such allocations are currently required. In the North Wales RTS, no allocations are recommended for crushed rock provision, other than a suggestion that, in Wrexham, the total landbank for all aggregates “*should be increased gradually over the period so that it accords more closely to the per capita requirement. This may necessitate the need to make allocations at the end of the first review period and consideration should be given to the provision of rock as well as sand and gravel*”. Elsewhere in North Wales, very small allocations for sand & gravel production are recommended in Anglesey and Denbighshire.
- 5.36 In South Wales, the only quantitative recommendations for site allocations are in Blaenau Gwent, Torfaen and Newport. In all other areas the existing crushed rock landbanks exceed the *per capita* requirements for the 15 year period covered by the RTS.
- 5.37 In all cases where recommendations have been made for site allocations, these have been based purely on the *per capita* calculations and have not been influenced by considerations relating to environmental capacity. The regional assessment referred to in Criterion 14 has, in some cases, been used to provide qualitative descriptions of environmental capacity limitations, but have not actually influenced either the apportionment calculations or the decisions on whether or not allocations are required. This is simply because neither of the methods (A and B) that were used to assess the level of apportionment required takes environmental capacity into account. To this extent, it may be argued that both Regional Technical Statements have failed to comply fully with Criterion 14.

Criterion 15 - To assess current and future imports and exports of aggregates.

- 5.38 No assessment of aggregate imports and exports is made by South Wales RAWP in their Annual Reports. Due to a detailed survey in 2005 (the year of an AM survey report) North Wales RAWP included information relating to the *current* volume of exports and transport methods of aggregate, within and from the region, in their 2005 annual report. Commentary regarding *future* imports and exports is included within the ‘Interregional Dependency’ chapters in both North and South Wales RTS documents, as mentioned into relation to criterion 2, above.

Criterion 16 - To assess the current and future contribution of marine aggregates.

- 5.39 Both RTS documents include assessments of the current and future trends of land-won and marine aggregate import and exports and related sustainability issues.
- 5.40 The South Wales RAWP has also contributed to the production of the Interim Marine Aggregates Dredging Policy (IMADP) for marine aggregates extraction off the southern coast, which is also referenced by North Wales RAWP in absence of other suitable policy for their region.

Criterion 17 - To advise the Assembly on the potential in each region in Wales for increasing the use of alternative materials to replace primary aggregates.

- 5.41 Both RAWPs assess the current use of primary aggregates extensively. However, neither issues direct recommendations of ways to increase the use of secondary materials within their regions.
- 5.42 Further discussion between the RAWPs and MPAs is required, in order to make recommendations to the Assembly on this issue.

Criterion 18 - The Technical Secretariat of the RAWPs will administer the arrangements for establishing joint voluntary arrangements of local authorities to assess the draft Technical Statement for Aggregates to provide a context for proper consideration of land use issues relating to aggregates provision in unitary development plans.

- 5.43 Meeting minutes reveal that RTS technical sub-groups of both the North Wales and South Wales RAWPs have been in full consultation with local minerals planners to establish joint voluntary arrangements within their respective regions. These arrangements have included the establishment of a member's forum in each RAWP area, underpinned in each case by a memorandum of understanding.
- 5.44 The members groups have subsequently been involved with the consultation process on each of the RTSs.

Criterion 19 - Each local authority in the region should then include in its own unitary or local development plan elements of the agreed Regional Technical Statement that are germane to its area at the earliest opportunity.

- 5.45 This is actually a role for the MPAs not specifically the RAWPs. Although the technical expertise of the latter group, particularly the technical secretaries would assist in implementing relevant RTS recommendations within local plans. The RTS documents are still a, or only just beyond, the consultation stage. Therefore the uptake of their policies and recommendations cannot yet be assessed, although some comments and feedback from the MPAs has been received as part of the stakeholder consultation exercise (see Chapter 4).

Criteria 20 - 27 (relating to the role of the RAWPs prior to the publication of MNTAN1 in 2004).

- 5.46 The majority of these criteria are now subsumed within those specified in MTAN1, although the wording used is invariably different. Thus,
- Criterion 20 is encompassed within Criterion 1;
 - Criterion 21 is encompassed within Criteria 3 and 8;
 - Criteria 22 and 23 are both encompassed within Criterion 6;
 - Criterion 24 is encompassed within Criterion 15; and
 - Criterion 26 is encompassed within Criteria 4, 5, 9, 10, 11 and 17.
- 5.47 In all of these cases, the observations set out above in relation to the corresponding new criteria are therefore applicable, in part to these former requirements.
- 5.48 There are, however, two of the older Criteria (no's 25 and 27) which are not directly matched by any of the new requirements specified in MTAN1.

Criterion 25, "To indicate to what extent the market area serviced by the Region could and should, be allowed to change in the medium and longer term (i.e. 10 and 20 years respectively)".

- 5.49 Very little, if any, consideration is given in any of the North Wales or South Wales RAWP reports prior to 2004 regarding the extent to which their respective market areas could and should be allowed to change. However, both RAWPs include more in-depth commentary of how the aggregates market itself is changing within those areas, particularly in terms of the increasing influence of secondary and recycled aggregate production on the need for and sales of primary land-won material.

Criterion 27, "To take adequate account of agricultural, amenity and other planning conditions in examining the above (particularly 6 (i.e. our 'Criterion 25)), (e.g. other land uses and transport)".

- 5.50 There is no specific evidence in any of the North Wales or South Wales RAWP reports from 2000 to 2004 of account being taken of planning conditions, land uses or transport issues when examining and presenting the data on sales, reserves, distribution patterns etc.

Summary

- 5.51 The role of the RAWPs has expanded considerably since the publication of MTAN1, particularly with regard to the preparation of Regional Technical Statements; the associated assessment of environmental capacity; and the collection of data on secondary aggregates and recycled materials. The RAWPs have done well in attempting to meet these additional requirements and have generally fulfilled their obligations to the best of their abilities. In most cases this has been sufficient to enable the system to work well, but there is room for considerable improvement in certain areas. In particular, there is a need for many aspects of the RTS process and its outcomes to be more transparent and clearly explained (both within the final documents and to those who are involved with their preparation/revision and adoption). Where the RAWPs' objectives have not been fully met, or have been met only with difficulties and/or delays, this can partly be attributed to the fact that RTS process is new, but it has also been influenced by a combination of other, more specific factors, ranging from a shortage of experienced staff within MPAs; to a lack of reliable data in some areas and to the pressures of undertaking increased workloads against tight timescales with limited resources.

The Effectiveness of the Technical Secretary Role (Objective 2B)

Criterion E1 - To organise a minimum of 2 RAWP meetings per annum in liaison with Chairman and members plus meetings with Assembly Government, the other Welsh RAWP Secretary and English RAWP Secretaries (including representing the Chairman at UK aggregates meetings as necessary).

- 5.52 Secretaries for both RAWPs have, on the whole, been very consistent in organising 2 RAWP meetings per year. According to meeting minutes made available on both RAWPs websites, attendance at these meetings has generally been good and from a broad cross-section of members including local planners, Operators, BAA / QPA representatives and WAG. RAWP Secretaries Group meetings (English and Welsh RAWPs combined) have recently been well attended by both North and South Wales Technical Secretaries.

Criterion E2 - To organise a minimum of four Regional Technical Statement sub-group meetings.

- 5.53 South Wales RAWP has hosted 10 RTS sub-group meetings between 2005 and 2007 and minutes for each of these meetings are documented on the South Wales RAWP website. The North Wales RAWP Website presents minutes for only four meetings between 2004 and 2006. The absence of published minutes for subsequent RTS meetings is thought to be attributable to the resourcing changes that took place after the previous Technical Secretary retired on 31st March 2006, and the resulting difficulty in keeping pace with work programmes whilst handing over duties to his contracted - out replacement later that year.

Criterion E3 - To ensure regular liaison with the mineral planning officers (and for the North Wales RAWP Secretary, the Contract Manager) to progress on monitoring and reporting work.

- 5.54 Secretaries for both RAWPs have contact with their respective local mineral planning officers through the organisation and attendance of the bi-annual RAWP meetings. Moreover, the Secretaries liaise regularly with planners to obtain the data required to inform the RAWP Annual Reports and four-yearly Aggregate Minerals Surveys required by central Government.
- 5.55 Evidence for this liaison is seen in the resulting data, as published in the RAWP Annual Reports (although confidentiality issues may result in some individual authorities' figures not being directly reported); and in the attendance lists in the published minutes for each of the meetings.
- 5.56 In the case of the contracted-out post of North Wales RAWP secretary, there is an additional requirement for liaison with the Welsh Assembly Government's Contract Manager. Specific evidence for such liaison cannot be found in any published documents but can be assumed to have taken place.

Criterion E4 - To administer the joint voluntary arrangements of local authorities to consider and secure agreement on the draft Regional Technical Statement for Aggregates.

- 5.57 Both Secretaries brought about the establishment of an RTS Members Forum in their respective regions, in 2005, for which the inaugural meeting minutes are available on both RAWP websites. Each Forum's overarching Memorandum of Understanding sets out the terms under which the Forum operates and both Memoranda have been agreed by all members of each Forum.
- 5.58 Objectives within those memoranda include: to consider the drafting and development of the RTS at key stages; to approve proposals and actions as required to maintain satisfactory progress; for each representative to evaluate the final projected demand for aggregate reserves and to secure approval of the RTS from the authority they represent; and ensuring the interrogation of the approved RTS into the appropriate UDP / LDP for each authority. Such objectives allow each forum the opportunity to consider, inform and guide the RTS which will have a significant influence on future local minerals planning.
- 5.59 Since the South Wales' Forum's inaugural meeting there are published records of two further meetings, at the last of which (in October 2007) it was agreed by all members that the draft RTS should be released for public consultation. The North Wales Draft RTS also went out for public consultation in February 2008, but there are no published records of any Forum discussions, where the decision to release the Draft RTS may have been documented, subsequent to the initial meeting in 2005.

Criterion E5 - The preparation of an Annual Report.

- 5.60 The Technical Secretaries for both RAWPs have coordinated the production of Annual Reports for every calendar year of monitoring from the late 1980s up to and including 2006.
- 5.61 Despite changes in the personnel undertaking the role of Technical Secretary in both RAWPs, reports have been prepared to a relatively consistent format, both within and between the two RAWPs. However, the range and detail of the data presented and the depth of discussion included has gradually increased over the years, as additional series of data have been sourced, from both MPAs and quarry operators – an example being information on secondary and recycled aggregates.

Criterion E6 - To organise, co-ordinate and collate annual surveys of the production of primary aggregates, road planings and alternative materials.

- 5.62 The Technical Secretaries of both RAWPs have coordinated the collection and analysis of aggregates data from mineral operators, via the Mineral Planning Authorities, on an annual basis, for collation and publication in the RAWP Annual Reports.
- 5.63 The annual monitoring surveys that are sent out to operators have become more comprehensive in the last few years, particularly to meet the need for more data on secondary and recycled aggregate production, sales and distribution.

Criterion E7 - To undertake an assessment of aggregates demand and supply, landbank reserves, both active and dormant, use of secondary and recycled materials as aggregates and environmental capacity for each unitary authority in the region to meet demand for aggregates.

- 5.64 These assessments, which go beyond the requirements of the normal annual reports, have been undertaken by each Technical Secretary for inclusion in the Regional Technical Statements.

Criterion E8 - To coordinate the 4-yearly Aggregates Monitoring surveys.

- 5.65 The Technical Secretaries for both RAWPs have successfully coordinated the more comprehensive, 4-yearly AM surveys within their respective regions and have collated the responses before passing these on to the British Geological Survey for national collation. Information has been gathered, data analysed and commentary provided for reports dating back to 1981 for both RAWPs. Data which fed into the latest (2005) AM survey has been used to inform technical aspects of the development of the RTSs.

Summary

- 5.66 Given the volume of work undertaken by the Technical Secretaries (to actively support the needs of the RAWP itself) in the time available to them as a part-time role, Secretaries past and present appear to have carried out the role very successfully. The preparation of the Regional Technical Statements, since 2005, has required considerable extra work, and as a result the role has become more involved and time-consuming. With RTS reviews and updates, and the need for further liaison with planners for implementing the recommendations of the RTSs, the role is likely to expand still further in future.

Evaluation of the Costs of the RAWPs and Technical Secretaries (Objective 2C)

RAWP Costs

- 5.67 With the exception of the Technical Secretary roles and their associated expenses (including the printing and publication of documents), no funding is provided by WAG to support the operation of the Welsh RAWPs. Instead, the time input and costs incurred by other RAWP members (including the Chairmen) and the members of the RTS sub-groups are effectively covered by the companies or organisations that they work for. These 'in-kind' contributions are impossible to quantify with any ease, and this has not been attempted as part of this study. They are likely to be considerable, however, especially in the case of the South Wales RAWP because of the large number of members involved. The contributions would need to cover, among other things:

- attendance at bi-annual RAWP meetings;
- attendance at additional RTS meetings in the case of RTS sub-group members;
- preparation in advance of those meetings (reading or preparing papers and holding 'pre-meetings' with colleagues to ensure that representative views are brought to the main meetings);
- dissemination of information to colleagues following the main RAWP and RTS sub-group meetings;
- the collection and provision of technical monitoring data to the RAWP Secretary;
- the checking and review of draft annual RAWP reports to ensure that these are as accurate and complete as possible;
- formal consultation by MPA officers with local authority members on the draft RTS, including the preparation of committee papers and attendance at meetings;
- travelling and other expenses incurred in connection with all of these activities;
- overhead costs to employers (including full payroll, employer's NI and Pension contributions, administrative costs and office accommodation)

Technical Secretary Costs

- 5.68 These are easier to quantify because the Technical Secretaries are paid for directly by WAG – either to the local authority, where the Technical Secretary is a serving MPA officer (as is currently the case in South Wales); or to the individual or organisation, where the post is contracted out to a consultant (as is currently the case in North Wales).
- 5.69 In the first of these cases, the sum paid by the Assembly, (though undisclosed to us) is intended to cover the time taken by the Technical Secretary to undertake his or her various RAWP duties, as specified, together with associated expenses, printing and publication costs and the local authority's corresponding overhead costs. It has been custom and practice that the authority concerned will provide the RAWP chairman and that it will host the RAWP and RTS meetings. It is understood that Bridgend used some of this funding to contract out a portion of the RTS preparation work.
- 5.70 In the second case of the contracted out Technical Secretary for North Wales, the contract sum was based on the outcome of competitive tendering. This excluded the work undertaken under a separate contract to assist with the South Wales RTS. It also

excluded any obligation to Chair or host the RAWP meetings. That role, however was generously continued by Gwynedd County Council until the completion of the RTS.

- 5.71 In both cases, WAG has confirmed that the sums paid were for the delivery of the contract requirements and not for a specified number of hours work. WAG has also confirmed that the level of funding was increased substantially to cover the RTS work.

6. ALTERNATIVE APPROACHES

- 6.1 This chapter focuses on **Objectives 3A-F**, as numbered in Table 2.1, above, relating to possible alternatives to the existing managed aggregate supply system, and to the delivery of that system. As with Objectives 1A-D in Chapter 4, this discussion draws upon the qualitative views obtained from stakeholders through the questionnaire survey, interviews and workshops.

Alternative Ways of Implementing the Technical Secretary and Chairman Roles (Objectives 3A and 3B)

Sourcing of the Technical Secretaries

- 6.2 At present, each Welsh RAWP is served by a Technical Secretary, either drawn from one of the constituent MPAs or contracted out to an appropriate specialist. The stakeholders were asked to consider which of these (or any alternative) solutions is the most suitable (and why) and whether the current arrangement was appropriate.
- 6.3 Most stakeholders recognised the concern that the next Technical Secretaries will be hard to source from within the MPAs – not least because of an increasing shortage of new staff and the retirement of more experienced officers. They therefore concluded that contracting out these positions to suitably qualified consultants may be the only way to fulfil this role. There are, however, both positives and negatives to these choices. A Technical Secretary sourced from within a MPA will naturally have very good links with the planning community, impartiality with respect to mineral operators and may have more 'on the ground' knowledge. An external consultant, on the other hand, whether as an individual or as a small team, may have a greater breadth of experience and/or expertise, greater impartiality with respect to individual MPAs (but perhaps with conflicts of interest with respect to industry) and may have greater flexibility to devote the necessary time to the role.
- 6.4 Some stakeholders suggested that, if the position of RAWP Chairman was to be funded and if the role of the Technical Secretary were to be expanded (see below) this might attract more interest.

The Role of the Technical Secretaries

- 6.5 Regarding the current terms of reference of the Technical Secretaries, it was felt that these could be clearer and expanded to include more detail.
- 6.6 As noted earlier (see para. 4.38 and preceding text), there seems to be broad agreement among stakeholders that there is a clear potential for the remit currently being fulfilled by the Technical Secretaries to be expanded. It has been suggested that this might usefully include requirements for the provision of technical advice and proactive guidance to MPAs (as happened in the past, before the role expanded to include production of the RTS), and for the co-ordination of feedback from MPAs on the implementation and need for improvement of the RTS.
- 6.7 Some considered that this might amount to a full time role during the preparation and revision of the Regional Technical Statements (say over 18 months to 2 years), reverting to a part time role in the intervening periods. Others considered that there was scope for an expanded role at all times, with additional effort being focused on data collection, dissemination and the provision of strategic planning advice to MPAs in between the 5 yearly RTS reviews. This, however, was not supported by industry representatives, who generally thought that, in future years, the task of RTS production would be far less demanding than had been the case the first time round.
- 6.8 In view of the difficulties that have been evident in filling the post in North Wales and in balancing the very different workload of RTS production with other duties in South Wales, a third alternative (supported by both MPAs and industry) would be for the Technical Secretaries' roles to be paired back to the core duties of monitoring reserves and production, and to supervising the production of the RTS, but leaving the detailed RTS

work and some or all of the additional duties to be undertaken by separately appointed consultants, with the RAWP acting as their Steering Group.

- 6.9 A fourth alternative, suggested at the workshops, would be for the role of the Technical Secretaries to be replaced by one or more full time posts within the Welsh Assembly Government. Those in favour of this idea noted that a position within the Assembly would give the role greater authority in making policy style recommendations through the RTS, and in collecting data. The over-riding view, however, was that this might dislocate the close working relationships that the Technical Secretaries need to have with both MPAs and industry, and that it would compromise the degree of independence from central Government that the role, and the RTS, currently have.
- 6.10 Alternative mechanisms for funding an expanded remit for the Technical Secretaries and/or supporting consultants were explored in the discussion workshops. As well as the option of funding by WAG, as at present, popular suggestions included funding from the Aggregates Levy Sustainability Fund (ALSF) and/or a system of pooled resourcing, whereby all of the constituent MPAs within each RAWP contribute a proportionate share of the contract costs, in return for strategic planning input from the post(s).
- 6.11 A variation on the last of these ideas was that it may be useful to have an intermediate tier of experienced, strategic planning advisors, in between the RAWP Secretaries and MPAs, which provided more specific support to sub-regional groupings of MPAs (perhaps resembling the former County Councils). It was noted that such officers could be funded on a contract basis using pooled resources from the MPAs involved, and would be able to assist both the MPAs and the Technical Secretaries. Further comments on sub-regional groupings are given in para. 6.29, below.

Potential Impacts for Society, the Economy and the Environment of not achieving a Managed Aggregates Supply (Objective 3C)

- 6.12 In order to assess the benefits of the current system, stakeholders were asked to contribute views on alternatives and amendments to the current managed aggregate supply system and to the role of the RAWPs within that system. Suggestions offered to the stakeholders for consideration included: simply dealing with minerals planning applications on their individual merits, like any other type of application; or retaining a managed system but without the assistance of the RAWPs.
- 6.13 Overwhelmingly, the stakeholders thought that a complete loss of the managed supply system would not be beneficial and would have serious adverse effects in terms security of supply of construction aggregates (with consequential impacts on economic development) and on the production of development plans (with consequential impacts on both the minerals industry and the control of environmental impacts). The British Aggregates Association encapsulated the views expressed by many others (including planners as well as industry) by suggesting that, without a managed aggregates supply system there would be a return to 'pre-Verney chaos' and to 'planning by appeal'. The first of these points is a reference to the Verney Report which recommended the need for both a managed supply system and the RAWPs. The second reference relates to the fact that, in the absence of well-informed development plans, there would be likely to be a big increase in speculative applications, a high number of refusals and a significant increase in the number of appeals leading to public inquiries. The high cost of these, together with the economic impact on industry associated with the loss of certainty, and the consequential reduced ability of industry to control environmental effects, would all be issues that would need to be taken into account.
- 6.14 It was noted by many stakeholders from a wide range of perspectives that, although the existing system is working reasonably well, it depends for its success on the availability of suitably trained and experienced planners within the MPAs, and that the availability of such people is steadily declining. In particular, there seems to be a perceived lack of those with geology and landscape design skills. There was widespread agreement on the need for this situation to be improved, with investment required from the Assembly and from individual MPAs in recruitment, training and investment.
- 6.15 Some stakeholders also noted the importance of policy-oriented research, funded by the Assembly, in achieving the progress that has been made in recent years, and noted that

this needs to be maintained, with consistent publishing of the research programme and its achievements.

Scenarios for Future Demand and the Responsiveness of the Current System for Aggregates Provision (Objective 3D)

- 6.16 The existing aggregates supply system in Wales is based on the assumption of only small increases in demand with greater changes accommodated by secondary and recycled aggregate. Stakeholders were asked how well they considered the current system would cope if the overall demand were to exhibit a steady and sustained increase or sudden large fluctuations.
- 6.17 The general view was that the system should be able to cope with a steady increase in demand. Ideally, the response would initially be an increased utilisation of secondary and recycled aggregates, but that cannot be controlled through the managed supply system alone – it would require additional management of demand, including the need to overcome perceptions that alternative materials are inferior to primary aggregates. There are also many uncertainties regarding the true availability of these alternative materials (because of poor survey responses) and both the QPA and BAA have noted that the utilisation of secondary and recycled aggregates is approaching a realistic maximum. Notwithstanding these uncertainties, the overall system would be able to cope with increasing demand because of:
- a) the availability of surplus landbanks of primary aggregate reserves in almost all MPA areas (as noted in the Regional Technical Statements);
 - b) annual monitoring of demand (or at least consumption); and
 - c) the facility to review the RTS (and thereby adjust or introduce apportionments for new site allocations) at five yearly intervals.
- 6.18 The option of increased output from primary reserves provides a ‘safety net’ for the system as a whole: although they may not be needed, the availability of primary aggregate landbanks provides an important reassurance to the construction industry that the security of supply can be maintained. There are, however, some reservations that need to be noted:
- 6.19 With regard to item (a) above, although substantial landbanks are available in most areas, the Regional Technical Statements have highlighted the fact that this is a shortfall of reserves, or no landbanks at all, in a few MPAs. In a scenario of increasing demand on primary aggregate sources, industry representatives have pointed out that, where reserves are missing or become exhausted, there will be a ‘ripple’ effect, with the demand being transferred to alternative sources in neighbouring MPAs, with a concomitant increase in the costs and impacts of transportation, as well as an increased rate of depletion of those reserves.
- 6.20 With regard to item (b), some stakeholders emphasised the need to monitor both actual demand and emerging development trends, not only in Wales but also in other market areas supplied from Wales – primarily in England. Unless this is adequately done, the system might be unexpectedly stretched when tested in this way, making it more difficult to respond without short term shortages of supply.
- 6.21 Turning to the scenario of sudden, large fluctuations in demand, these could be seen, for example, as a direct consequence of the Planning Bill and its intended effect on accelerating major development initiatives such as the proposed Severn Barrage. Stakeholders again considered that the existing system should be able to cope with this scenario, but that, in some cases, this might precipitate the need for an immediate review of the RTS, in order to address the sudden increase in rates of depletion of reserves in certain locations, and to arrest the ‘ripple effect’ that would otherwise occur if productive capacity at those sites were not maintained.

Alternative Mechanisms for the Delivery of Core Policy Objectives (Objective 3E)

- 6.22 As explained at the start of Chapter 4, the RAWPS are required to contribute to core policy objectives (in MPPW and MTAN1) primarily by supporting the managed aggregate

supply system in Wales by monitoring supply and demand; and by taking responsibility for the production and implementation of Regional Technical Statements. There are, however, alternative ways in which the core objectives behind those requirements might be delivered. The specific alternatives noted in the project specification were the options of “*continuation of the RAWPs, national or regional apportionment, market competition and reaction to activity on the ground*”. Each of these was put to the various stakeholders in the individual meetings and the opportunity to comment more generally on alternative systems was incorporated within the questionnaire. No alternatives other than these were put forward by those who were interviewed or responded to the questionnaire survey and none were suggested by those attending the workshop discussions.

- 6.23 The option of ‘*continuation with the RAWPs*’ is portrayed in the Specification as the ‘baseline scenario’ against which alternatives need to be compared. However, since at least one of the other suggested alternatives also requires the RAWPs to continue, the baseline scenario should more correctly be phrased as ‘*continuation with the existing Welsh managed aggregate supply system*’ (i.e. including the features relating to the proximity principle and environmental capacity). The benefits and costs associated with this option are covered elsewhere in this report, and stakeholder views of not continuing with *any* kind of managed aggregate supply system are noted in para’s. 6.12 to 6.15, above.
- 6.24 The option of using ‘*National and Regional Apportionments*’ is a reference to the system used in England (and formerly in Wales, prior to devolution), whereby, as explained in para. 3.29, above, anticipated supply requirements at both national and regional levels are based on econometric demand forecasting, rather than assuming (as in Wales) that demand will not increase and that, if it does, it will be met by secondary and recycled materials, rather than primary aggregates. Such a system necessarily requires the existence of the RAWPs (or some other regional bodies) in order to subdivide the regional figures into sub-regional apportionments (i.e. the supply requirements for individual MPAs). The distinction between this and the baseline scenario is therefore a question of whether or not demand projections should be used and the way in which the sub-regional apportionment system takes account of sustainability issues.
- 6.25 Regarding the first of these points, the stakeholder observations reported in relation to Objective 3C, above, suggest that demand forecasts do not necessarily need to be built rigidly into the system, as they are in England, but that it is sensible for anticipated trends to be at least considered and for actual trends to be monitored as closely as possible. This would become much more of an issue were it not for the very large surplus landbanks which currently exist in Wales.
- 6.26 Regarding the second point, concerning the way in which the sub-regional apportionment system takes account of sustainability issues, most stakeholders observed that the Welsh system of specifying a particular methodology for this was, perhaps, preferable to the English system of allowing each region to adopt its own methodology (as explained at para. 3.34 *et seq.*). These comments need to be tempered, however, with the understanding that the Welsh apportionment system is based only on the ‘*per capita*’ approach and (as explained at para. 5.37, above), does not take account of environmental capacity. There was a significant degree of confusion on this issue among stakeholders, including Steering Group members.
- 6.27 The ‘*market competition*’ option referred to in the specification can be assumed to mean that there would be no managed aggregate supply system in place and that applications for new aggregate reserves would come forward from industry as and when justified by the demand for new material. The stakeholder comments summarised in paragraphs 6.12 to 6.15, above are applicable here, but it should also be noted that the industry would not necessarily wait until market forces dictated a need for new reserves before submitting planning applications. In the absence of any allocations in Development Plans, and in the absence of any independent assessment of demand, the major operators (at least) would see a commercial advantage in obtaining as many new permissions as possible, and (if necessary) working some of them at a minimal rate of output in order to conserve those reserves as future assets whilst still complying with planning legislation.
- 6.28 The ‘*reaction to activity on the ground*’ option could be envisaged as taking place with or without a degree of management. If left entirely to market forces, the comments set out in

paragraphs 6.12 to 6.15, above would apply once again. If the industry response were to be managed in some way, this would require a system of tracking development pressures (both in Wales and in the market areas in England that are served by Welsh quarries), coupled with a system of allocating new permissions in response to those pressures. For this to work efficiently, allowing for the time needed to prepare and determine minerals planning applications and associated Environmental Statements and operational licences, there would need to be a 'buffer' of extant planning permissions already in place – otherwise known as a landbank. It may therefore be concluded that a system involving 'reaction to activity on the ground' would either be chaotic (if unmanaged) or would need to be very close to the existing system involving monitoring of supply and demand, maintaining landbanks and deciding on apportionments.

- 6.29 One further option for delivering core policy objectives that was discussed with all stakeholders was the concept of using *sub-regional groupings of MPAs and industry representatives* to consider apportionment strategies. Such groupings, perhaps on the scale of the former County Councils, have already been discussed in relation to the role of the Technical Secretaries (see para. 6.11 above), but their potential wider merits are considered here.
- 6.30 A number of stakeholders considered that sub-regional groups of this sort, guided by the Technical Secretaries, could deal effectively with the issue of determining MPA apportionments using the RTS methodology, and would also be better placed than either the full RAWP or the individual MPAs to consider issues relating to environmental capacity, geological resource suitability and spatial variations in actual (rather than theoretical) demand. They would be focused on implementation of the general principles established by the RAWP as a whole and set out within the RTS. Such groups would allow a more strategic overview to be taken in the search for suitable site allocations over areas wider than individual MPAs.
- 6.31 Involving the Technical Secretaries would help to bring a consistent message across Wales as to how best to implement the RTS. At present, each MPA has little knowledge of how their counterparts are dealing with the process and how decisions are made.
- 6.32 There are good case examples noted in England, although not directly related to the RAWPs, of dealing with some aspects of minerals planning through regional groupings above MPA level. These include the Greater Manchester Geological Unit (GMGU) representing 10 separate authorities within greater Manchester, and the Joint Strategic Planning Unit for the Berkshire Unitary Authorities. It is understood that, in Wales, the Chief Executives of all Unitary Authorities are currently engaged with a study by Urban Vision into the concept of similar joint working relationships across a number of areas of planning.
- 6.33 Other stakeholders voiced the opinion that the Technical Secretaries were not necessarily needed within these groups but that the groups might function well under the 'RAWP' banner, in terms of their general aims and objectives. These stakeholders suggested a 'chief planner' to be the lead in each of these subgroups of MPAs. These groups could provide the support, geological and spatial planning expertise to the constituent MPAs that is needed to implement the RTS.
- 6.34 Having sub-regional groupings of some kind may be able to alleviate some demand for guidance from the RAWP Technical Secretaries, and/or allow greater technical focus on specific topics as required. It was thought that any sub-regional groupings should be required to summarise their activities and findings for presentation at RAWP meetings. This may allow a more efficient transfer of information allowing discussion of the impact and strategy on a wider scale, while potentially sparing in-depth technical detail. Such sub-groups may be able to inform the RTS review process.
- 6.35 If this is to be successfully done in Wales, it is thought that careful consideration should be given to the areas that any sub regions cover, taking in to account housing market boundaries and waste policy regions when making this decision.

**Alternative Mechanisms and Additional Scope for Data Collection and Collation
(Objective 3F)**

Alternative Mechanisms

- 6.36 It was suggested that the annual survey of primary aggregate sales, reserves and distribution carried out by the RAWPs needed stronger enforcement in order to obtain the base data necessary for the system to function well. Suggested options for this included having the Technical Secretary solely responsible for implementing the survey rather than the MPAs, and that the QPA might be in a position to encourage quicker survey returns from the individual operators than has previously been the case.
- 6.37 It was also felt that the survey itself should be reassessed and perhaps combined (or at least issued in conjunction) with the statutory Annual Mineral Raised Inquiry (AMRI), in order to encourage a better rate of response and avoid survey fatigue. Whilst it would be very difficult to modify the AMRI survey, there could be merit in designing the RAWP survey in such a way that exactly the same questions were asked on both, with some additional questions being added to the RAWP survey form to cover any additional information required. This would greatly simplify the task of completing the RAWP questionnaire.
- 6.38 In terms of presentation of the results, the existing design of the annual RAWP reports was generally thought to be suitable, but it was noted by a number of stakeholders that this could be improved if there were greater consistency – both between the different RAWPs and between successive years. With regard to the last of these points, a degree of compromise is obviously needed to allow for innovations and to overcome the perennial difficulties of confidentiality (where data for groupings of MPAs is sometimes necessary, but with different groupings in different years as individual quarries come and go, or administrative boundaries change).
- 6.39 Stakeholders noted that the RAWP websites were well designed and contained useful information which should continue to be updated regularly. The websites were thought to be a potentially valuable tool for greater dissemination of information to members regarding the various activities of the RAWPs.

Additional Scope

- 6.40 In recognition of the uncertainties associated with certain data sets (e.g. reserve assessments in the case of primary aggregates; and almost all aspects of the surveys of secondary and recycled materials), it was suggested that there could be more information about the nature of the data collected (its reliability and completeness) presented to those who have to develop plans and make decisions based on it. This would also be helpful to those who may otherwise draw inappropriate conclusions from the raw data.
- 6.41 Stakeholders highlighted the importance of information on supply routes in relation to the patterns of supply and demand (including cross-border demand from England). By collecting this information and disseminating it through the annual RAWP reports, local authorities might be in a better position to understand the carbon footprint implications of the existing supply patterns in their areas, and those which might result from revised apportionments.
- 6.42 Stakeholders noted that the RAWPs might be in a good position to collate and report on information regarding environmental benefits created in their area through the Aggregates Levy Sustainability Fund. It was suggested that this would help to make the link between quarrying and these benefits more obvious for communities.
- 6.43 Although outside of the RAWPs role to produce, the lack of BGS mapping in some areas was seen to be a hindrance in planning for minerals. It was suggested that the RAWPs might be in a position to prompt more speedy production of these maps. There is also perceived to be few sources of information for the economic viability of the geology in some areas of Wales.

7. KEY FINDINGS AND RECOMMENDATIONS

- 7.1 Tables 7.1 and 7.2, below set out the key findings and corresponding recommendations (where these are needed) relating to the main aim and objectives of this study. Table 7.1 deals with the managed aggregate supply system in Wales and the role of the RAWPs within this. It brings together the key observations regarding how the system has been working so far and recommendations for continuation, change or alternative approaches, as considered appropriate. Table 7.2 then deals with observations relating to the way in which the details of the system are defined, managed and implemented.
- 7.2 Some additional key observations with further corresponding recommendations are presented in Table 7.3. These relate to important topics that were raised in the various discussion meetings and workshops, but which are tangential to the aim and objectives of the research

Table 7.1: The Role of the RAWPs in the Managed Aggregate Supply System in Wales

Key Findings	Corresponding Recommendations
<p>The Managed Aggregates Supply System is regarded by all stakeholders as both necessary and working well. The system provides an important degree of confidence to the minerals and construction industries in the long term security of supply, with an in-built flexibility to cope with changes in demand. Without it, there would be less scope for strategic thinking, less opportunity to achieve sustainable supply patterns and much greater reliance on the appeals process, at much greater cost to everyone. Unlike those in England and Scotland, the Welsh system seeks to prescribe a specific method of dealing with environmental capacity and proximity principle (carbon reduction) issues.</p>	<p>1. No alternative mechanism is necessary, but fine tuning would deliver useful improvements, particularly regarding:</p> <ul style="list-style-type: none"> ▪ the Regional Technical Statements ▪ the utilisation of Environmental Capacity criteria <p>Further observations and corresponding recommendations on these issues are given below</p>
<p>The Role of the RAWPs in monitoring and delivering the managed aggregate supply system is also seen by stakeholders as both important and necessary. Without the RAWPs it would be far more difficult for the Welsh Assembly Government (WAG) to manage the system, to interface with mineral operators, or to achieve the consensus needed between industry and MPAs for the system to work well. The current arrangement of two RAWPs is considered appropriate due to the very different supply and demand patterns within the two regions and the limited movement of aggregates between them.</p> <p>The existing functions of the RAWPs, as set out in MTAN1 are generally appropriate, but some fine tuning is required (see Table 7.2 for details).</p>	<p>2. The RAWPs for North Wales and South Wales should be retained in their current form.</p>
<p>The RAWPs Membership is considered to be about right, and should remain technically focused, but one important omission is the 'end users' sector (e.g. the House Builders Federation, the County Surveyors' Society etc.).</p>	<p>3. The RAWPs should identify and invite representatives of the construction industry and/or other end users to be included on their panels.</p>
<p>Awareness of the RAWPs is very limited and new members, particularly from MPAs, can find the meetings too technical.</p>	<p>4. The RAWPs should consider the publication of a layman's guide explaining the purpose and work of the RAWPs for prospective new members and a wider audience, including the elected members on the RTS sub-groups. Interim progress reports from the RTS sub-groups would also be useful</p>
<i>Continued ...</i>	

Table 7.1 continued	
<p>The Regional Technical Statements (RTS) now lie at the heart of the managed supply system in Wales and are seen by all consultees as a positive step forward. There is a need, however, for further refinement and for clarification of the status and ownership of the documents</p> <p>The preparation of the RTS has been both difficult and time consuming, not least because this is the first time the RTS concept has been implemented.</p> <p>Both industry and MPAs have noted that the clarity of presentation, the currency of the data and the procedures for dealing with consultation responses have all been compromised to varying degrees – perhaps because of the need to complete the documents within a tight timescale.</p> <p>They also consider that, when the documents are next revised, they need to be written more concisely and in a style that is more attractive and easier to follow.</p>	<ol style="list-style-type: none"> 5. The Regional Technical Statements should remain in place but should be refined in the next review. In particular, the clarity and quality of presentation of the RTS need to be improved with clear explanations of the methodologies and data sources used, and with commentary on the reliability or otherwise of individual datasets and conclusions drawn from them. Notwithstanding these additional requirements, overall, the documents need to be reduced in length and therefore written more concisely 6. The status and ownership of the RTS, although implied in Annex A to MTAN1, need to be spelled out more clearly within the RTS documents themselves. 7. The processes of RTS preparation, consultation and adoption also need to be clarified. 8. The timing of future RTS revisions should be adjusted to tie in with the four-yearly AM surveys, so that the most comprehensive and accurate source data can be utilised, along with the review of demand carried out as part of the RTS process, to inform the requirements for future sub-regional apportionment.
<p>The attempts to address Environmental Capacity (using the IMAECA method) and carbon reduction through the Proximity Principle are seen by most stakeholders as being potentially better, <i>in principle</i>, than the less prescriptive system in England. However, there are still doubts within industry, especially, as to the validity of the IMAECA approach and more specific concerns regarding:</p> <ul style="list-style-type: none"> ▪ the limited selection of environmental criteria used; ▪ the equal weighting given to those criteria; ▪ potential conflicts with other policies (e.g. mineral working in National Parks and preferences for extensions rather than new quarries); ▪ the fact that the apportionment calculations for individual MPAs appear to have reflected only the <i>per capita</i> assessments, dealing with the proximity principle. The calculations do not seem to have taken any account of Environmental Capacity or of differences in external demand between different MPAs (e.g. exports of High Specification Aggregate from South Wales and Limestone exports to NW England from North Wales). <p>[Although exports to England are taken account of in the overall (national) demand assumptions within MTAN1, and are therefore built into the apportionment totals, the unequal distribution of that demand is not reflected in the figures for individual MPAs]</p>	<ol style="list-style-type: none"> 9. The way in which the IMAECA system is implemented needs to be re-examined by WAG, before the next review of the RTS, to address the concerns listed opposite, and to take account of feedback from the RAWPs and MPAs. Before it is used again, the methodology needs to be clearly explained to the RAWP members. 10. Given that IMAECA is only one of a range of tools available to the RAWPs to guide the location of future mineral working, it may be appropriate for sub-regional groups of MPA officers and industry reps, who are familiar with the range of issues within their areas, to work together with the RAWP Technical Secretaries in carrying out future apportionments. This would help to ensure that spatial differences in external demand are taken into account and would allow a more strategic overview to be taken in the search for suitable site allocations over areas wider than individual MPAs. (see also recommendation 24, in Table 7.2, below). To feed into those assessments, additional information may be needed on the suitability of geological resources for use as aggregates in areas that are not currently worked.

Table 7.2: Terms of Reference, Performance and Administration of the RAWPs

Key Findings	Corresponding Recommendations
<p>Terms of Reference for the RAWPs:</p> <p>Stakeholders considered that the current Terms of Reference, as set out in Annex A to MTAN1, were both comprehensive and appropriate.</p> <p>A number of difficulties have been faced by the RAWPs in the collection of data, particularly on secondary and recycled aggregates (see below for details). Moreover, some of the designated RAWP functions relating to secondary and recycled aggregates involve elements of duplication and might therefore need to be rationalised.</p>	<p>11. Consideration should be given by WAG to the benefits of reassessing and perhaps rationalising the RAWP functions relating to secondary and recycled aggregates (i.e. those designated in this report (Table 2.1) as Criteria 4, 5, 9, 10, 11 and 17). This will need to be informed by the outcome of round-table discussions regarding improved ways of collecting data on these materials (see recommendation 13, below)</p> <p>12. Information about the sources, reliability and completeness of data, and its suitability for different types of analysis, should be included in the RAWP reports and RTS.</p>
<p>Data Collection: Secondary and Recycled Aggregates:</p> <p>The RAWPs are required to <i>monitor</i> the production of secondary and recycled aggregates, including wastes with the potential for use as aggregates; and are also required to assess the utilisation of such materials and the capacity within each MPA to increase both production and utilisation. In practice, with the exception of road planings, the RAWPs do not collect any of the source data required to meet these objectives but rely instead on surveys carried out by others. Through their annual reports and the Regional Technical Statements the RAWPs have reported that much of the source data is of questionable reliability, not least because of differences in survey methods, differences in information sources, and low response rates due to the effects of survey fatigue.</p> <p>It is beyond the scope of this review to resolve these difficulties, so this is an area in need of further work.</p> <p>It is noted that there is some degree of confusion in various documents regarding the terminology associated with secondary and recycled aggregates</p>	<p>13. There is an urgent need for the wide range of surveys and regulatory reporting requirements associated with secondary and recycled aggregates to be rationalised, integrated and improved, so that more complete, consistent and reliable data are obtained as efficiently as possible. It is recommended that WAG should identify the best way of addressing this need by seeking independent expert advice and by instigating round-table discussions with the various stakeholder organisations involved (those who require the information – including the RAWPs and the Environment Agency; and those involved in the generation and use of secondary and recycled materials). Depending on the outcome of that exercise, there may, or may not, be a role for the RAWPs in collecting (as distinct from collating and reviewing) new data. Until the above discussions have taken place, and a coordinated solution has been agreed, it would be counter-productive for the RAWPs to attempt additional surveys of their own.</p> <p>14. In all surveys, reports and policy statements relating to secondary and recycled materials there needs to be a more consistent use of terminology (see Glossary for further details)</p>
<p>Data Collection: Land-based Primary Aggregates:</p> <p>The RAWPs have successfully monitored the annual production and reserves of land-based primary aggregates for many years. Although this exercise is relatively straightforward, compared with that for secondary and recycled materials, it is acknowledged by the RAWPs and others that the source data on reserves from mineral operators are likely to be variable in their accuracy, both from year to year and between different companies, with the most reliable figures being those associated with the 4-yearly AM (Aggregate Mineral) surveys required by Government (in both Wales and England)</p> <p>Confidentiality issues need to be overcome in order to reveal a clearer picture for each MPA</p>	<p>15. Production, reserves and landbanks of land based aggregates should continue to be monitored by the RAWPs on an annual basis</p> <p>16. RAWPs should seek to encourage a standardised approach by mineral operators in assessing reserves.</p>
<p>Data Collection: Transportation of Aggregates:</p> <p>Additional data is needed on the transport of aggregates, in order to understand the complexities which already distort the 'proximity principle' (e.g. local distribution patterns via intermediate depots, asphalt plants and concrete batching facilities; and exports of High Specification Aggregates to many parts of England). Such data is also needed to provide a basis for measuring the effectiveness of any future changes in reducing carbon emissions. The data is complex, however, and time consuming to collate. There will always be a trade-off between the complexity of the information requested and the completeness of the resulting survey responses. The most complete data is that produced by the operators in connection with the 4-yearly AM surveys</p>	<p>17. Collation of information on the transport/distribution of aggregates from primary, secondary and recycled sources should be attempted only on a 4-yearly basis, relying on information from the AM surveys.</p>
<p><i>Continued ...</i></p>	

<p>Table 7.2 continued</p>	
<p>Terms of Reference for the Technical Secretaries:</p> <p>Some stakeholders felt that these could be clearer and should be expanded to include more detail, in recognition of the way in which the role of the Technical Secretary has expanded since the publication of MTAN1.</p> <p>There is a clear potential for the Technical Secretaries' roles to be expanded further. The additional scope could usefully include requirements for the Technical Secretaries to:</p> <ul style="list-style-type: none"> ▪ provide MPAs with technical advice and proactive guidance, ▪ encourage cooperative working between MPAs, and to ▪ coordinate feedback on the implementation and need for improvement of the RTS. 	<p>18. In recognition of the expanded workload of the Technical Secretaries, and the potential for this to be widened further, the Welsh Assembly Government should consider alternative ways of procuring the various services involved. The options available include:</p> <ul style="list-style-type: none"> ▪ Increasing the remit of the Technical Secretaries and, if appropriate, further increasing the funding provided to undertake the work; ▪ Reducing the remit of the Technical Secretaries to the 'core duties' of monitoring production and reserves plus supervising the RTS production, and making separate appointments of external consultants to undertake the more detailed RTS work. <p>19. The detailed definition of the remit for the Technical Secretary and/or supporting consultants is likely to change over time and should be re-evaluated periodically by WAG.</p>
<p>Sourcing and Funding of the Technical Secretaries and Chairmen:</p> <p>The Technical Secretaries and RAWP Chairmen roles are already very demanding on the host MPA and difficult to achieve on a part-time basis. This is evidenced by the lack of any MPA in North Wales volunteering to take over from the previous incumbents in 2006, and by the fact that the external consultant appointed to take over the N. Wales TS post was also asked to assist with preparing the South Wales RTS.</p> <p>The situation is compounded by the potential for the TS role to be further expanded, as outlined above, and also by the chronic shortage of experienced MPA officers to take on the role (see below) and the need for additional funding.</p> <p>As in any supply chain, there is a vital need for 'succession planning' to ensure that the system continues to be managed effectively in order to ensure a continued security of supply. A clear strategy and appropriate funding arrangements therefore need to be identified.</p>	<p>20. If the Technical Secretaries' roles are reduced in scope, in line with the second of the alternative options presented above, priority should be given to filling those positions from experienced officers drawn from MPAs within the region. If the roles are to be expanded, they are likely to be capable of being fulfilled more effectively by consultants with relevant expertise and detailed local knowledge</p> <p>21. The role of RAWP Chairman should, ideally, continue to be filled by an experienced MPA officer (whether currently serving or retired). This would perhaps be an easier vacancy to fill if the posts were funded.</p> <p>22. As well as the option of funding directly by WAG (as at present in the case of Technical Secretaries), consideration should be given to the options of funding either or both posts from the Aggregates Levy Sustainability Fund (ALSF) and/or a system of pooled resourcing, whereby all of the constituent MPAs within each RAWP contribute a proportionate share of the contract costs.</p>
<p>As noted above, there is a chronic shortage of experienced minerals planning officers available within many individual MPAs. This is partly due to the small size of some Unitary Authorities but may also be due to a shortage of funding and/or unattractive salaries/job specifications. The problem is exacerbated by the retirement of the most experienced staff, the 'poaching' of others by industry or consultancies, the greater emphasis given to waste planning in some MPAs and, more generally, the lack of training opportunities for prospective new staff. All of this is very relevant to the success or otherwise of implementing the RTS. Together, these factors limit the availability of experienced personnel to contribute to the RAWPs and they restrict both the availability and suitability of MPA staff to fulfill the role of Technical Secretary.</p>	<p>23. In the short term, the option of using external consultants to either provide or support the Technical Secretaries' roles may help to alleviate the shortage of experience within MPAs. In the longer term it would be desirable to invest in the training, recruitment and retention of in-house minerals planning officers.</p> <p>24. There would be considerable merit in the funding of additional sub-regional posts to provide minerals planning support to groups of adjoining MPAs, particularly on strategic issues, including input to and implementation of the Regional Technical Statements. (See also Recommendation 10, in Table 7.1, above). In the longer term, such officers could contribute to a regional tier of strategic planning policy (comparable to the RSS in England), which at present does not exist in Wales.</p>
<p>Performance of the RAWPs:</p> <p>There is no previous data on RAWP performance against which the findings of this review can be compared.</p> <p>This review has found that, in most respects, the RAWPs have fulfilled their obligations to the best of their abilities. In most cases this has been sufficient to enable the system to work well, but there is room for improvement in certain areas. Where the RAWPs' objectives have not been fully met, or have been met only with difficulties and/or delays, this has been due to a combination of external factors, ranging from a lack of reliable data in some areas to the pressures of undertaking increased workloads against tight timescales with limited resources. The various recommendations outlined in this and the previous table should help to address the specific difficulties which have hindered better performance.</p>	<p>25. To facilitate future reviews and more frequent monitoring of performance, it would be useful if future RAWP reports could include a 'self appraisal' of their performance in meeting the objectives assigned to them each year.</p>

Table 7.3: Additional Observations Arising From This Study

Additional Observations	Corresponding Suggestions
<p>Existing landbanks for crushed rock are excessive in many parts of Wales, and these provide a large buffer against any future unexpected increases in demand or reductions in secondary/recycled materials. Current policies will see landbanks gradually fall in those areas through a combination of zero apportionments and the use of prohibition orders.</p> <p>Although para. 45 of MTAN1 requires landbanks to be calculated on the basis of recent sales, this would seem to conflict with the more general desire to ensure that future patterns of supply should be as sustainable as possible and should not simply perpetuate historical patterns.</p>	<p>The RAWPs should continue to monitor landbanks carefully, and WAG should consider whether, in future, the length of landbanks within each MPA should be calculated on the basis of the annualised apportionment requirements for that MPA, as determined by the RTS, rather than on recent production. For this to work, it is essential that the apportionments take account of external demand as well as domestic consumption</p> <p>Separate monitoring should be undertaken, at least qualitatively, for different types and qualities of aggregate. It is recognised that it may not always be possible to publish separate figures for commercial reasons, but qualitative comments in the RAWP reports and RTS would help to highlight any potential shortages of particular materials that otherwise would be hidden within overall landbank figures.</p>
<p>Existing landbanks for land-based sand & gravel are zero for MPAs in South East Wales. This conflicts with the MTAN1 requirement for a minimum of 7 years, although it is due, primarily, to the continued availability of supply from marine sources. The WAG Position Statement on Sand & Gravel Supply for South East Wales (December 2002), stated that <i>“the use of marine dredged sand and gravel will continue for the foreseeable future but only where this remains consistent with the principles of sustainable development”</i>. In the meantime, the South Wales RTS reinforces the need for potential land based resources to be safeguarded and requires some of them to be investigated in more detail. Such work may, in some cases, identify land-based resources that might contribute to a more sustainable supply pattern overall.</p>	<p>The RTS recommendations for investigating land based sand & gravel resources in more detail in some areas should be implemented.</p>
<p>There has been some confusion and concern over the Safeguarding of aggregate resources for future working. This is despite the policy statement in para. 13 of MPPW and references to safeguarding in para 32 of MTAN1 and throughout the Regional Technical Statements. Particular issues raised include the need (or otherwise) to safeguard resources in National Parks (given that site allocations are not required in these areas); what criteria should be used in identifying areas for safeguarding; and what can be said about the likelihood of future quarrying within these areas.</p>	<p>Clear and detailed guidance on what safeguarding means, what criteria should be used and how it can be achieved in practice needs to be issued to MPAs and, in future, should be incorporated into MTAN1.</p> <p>Additional geological resource mapping is required to assist in identifying potential safeguarding areas - particularly regarding land-based sand and gravel resources in south-west Wales.</p>

GLOSSARY

Throughout this report, the following terms, frequently used in relation to RAWP activities, have the specific meanings shown.

Term	Definition, in relation to the supply of aggregates
Aggregate	Crushed rock, natural sand and gravel or artificial granular material that is used in construction, often in conjunction with a suitable binding agent such as bitumen or cement.
Primary Aggregates	Aggregates sourced directly from naturally occurring geological materials as a primary product (as distinct from secondary aggregates, including excavation wastes, produced as a by-product from the extraction or processing of geological materials for other primary purposes).
Secondary Aggregates	<p>These are usually by-products of other industrial processes, or the arisings from non-aggregates extractive operations, that have been processed to meet the specification requirements for construction aggregate materials. They can be sub-divided into manufactured and natural materials, depending on their source. Examples of manufactured secondary aggregates are pulverised fuel ash (PFA) and metallurgical (iron and steel) slags. Natural secondary aggregates include china clay sand, ball clay sand, aggregate produced from slate waste or colliery spoil and excavation wastes (as defined below). All of these are exempt from the aggregates levy, giving them a deliberate cost advantage over primary materials, in an attempt to encourage their greater use.</p> <p>The above definition distinguishes secondary aggregates from recycled materials (see below), although in practice the two terms have, in the past, sometimes been erroneously confused.</p>
Construction, Demolition and Excavation Wastes (CD&EW)	A term referring to wastes (see below) arising from the construction or demolition of buildings and/or civil engineering infrastructure, or from excavations associated with land levelling, foundations or other civil engineering works. Aggregates may be derived from some of these various waste streams, either as recycled materials or from excavation wastes (both of which are defined separately below).
Waste	Any substance or object which the holder discards or intends, or is required, to discard. In CD&EW surveys, materials arising from construction or demolition works, or from associated excavations, which are beneficially used <i>in an unprocessed form</i> on the site on which they arise are generally not regarded as waste, because they are not generally regulated as waste.
Road planings	A particular example of CD&EW materials, comprising aggregate and bituminous or cement binder materials that have been 'planed' from the surface of a worn out road prior to resurfacing with new or recycled materials.
Recycled Materials suitable for use as Aggregate	These are materials, usually arising from construction or demolition projects, which have previously been used for construction purposes, and which are capable of being recycled or re-used as construction aggregates for a second or further time. In the Finance Act 2001, all materials previously used in construction are exempt from the aggregates levy, giving them a deliberate cost advantage over primary aggregates in an attempt to encourage their greater utilisation.
Excavation Waste suitable for use as Aggregate	<p>These are materials that may be suitable, with or without processing, for use as secondary aggregates, arising from excavation works:</p> <ul style="list-style-type: none"> a) on the site of any building or proposed building, where the excavation is undertaken exclusively for the purposes of laying foundations, pipes or cables; b) on the site of any river, canal, watercourse or navigational channel, where the excavation is undertaken exclusively for the purpose of creating, restoring, improving or maintaining that feature; c) along the line or proposed line of any highway or proposed highway, where the excavation is undertaken for the purpose of constructing, improving or maintaining the highway and not wholly or mainly for the purpose of extracting aggregate. <p>Each of these categories, as defined more precisely in the Finance Act 2001, is exempt from the aggregates levy, giving these materials a deliberate cost advantage over primary materials in an attempt to encourage their greater utilisation.</p> <p>As noted above, in CD&EW surveys, arisings from such excavations which are beneficially used <i>in an unprocessed form</i> on the site on which they arise are generally not regarded as waste, because they are not generally regulated as waste.</p>
Mineral Wastes	Mineral wastes are identified in MTAN1 as a further category of material with potential for use as aggregate. The term is specifically used to encompass aggregates from slate waste, colliery spoil, and crushed rock fines (i.e. the "dust" generated from crushing and screening operations in hard rock primary aggregate quarries). It may also include aggregates produced from the excavation and processing wastes at building stone (dimensional stone) quarries. Aggregates produced from slate waste and colliery spoil are classed as secondary materials (see above) and are exempt from the aggregates levy. The same is not true of crushed rock fines, or of the residue from building stone production, both of which remain classed as primary aggregates and are not exempt.

Production	The overall rate at which products are generated, in tonnes (or millions of tonnes) per year, <i>whether or not they are sold</i> . In quarrying, production includes any unsaleable materials that may be produced, including overburden, interburden and processing waste. Depending on localised geological and market circumstances, the latter may include scalplings and 'dust'- i.e. the fine fraction generated by crushing and screening, which may or may not be useable. Production therefore represents the overall rate (in tonnes (or millions of tonnes) per year) at which the permitted reserves at a particular site or group of sites are being used up.
Sales	The rate at which products are sold, in tonnes (or millions of tonnes) per year. In quarrying, for the reasons outlined above, this will usually be less than the rate of production.
Consumption	The rate at which products are used, within a specified market area, measured in tonnes (or millions of tonnes) per year. The amount of consumption, and the amount of money spent on it, will reflect the changing interaction between demand and supply, as defined below.
Demand	The need or desire for a particular product, backed by an ability to pay. Demand is measured over a given time period, and is determined by a number of factors including the potential consumer's budgets and preferences, and the price and availability of alternative products. For most products, demand falls as the price rises. Demand for aggregates is normally expressed in terms of the rate at which it is expected to be used within a particular market area, taking account of the economic factors listed above, and is measured in tonnes (or millions of tonnes) per year.
Supply	The amount of a product which producers are both willing and able to sell at a given price. For most products producers are increasingly willing to supply as the price rises. Supply of aggregates is normally expressed in relation to a particular source area and is measured in tonnes (or millions of tonnes) per year.
Distribution	The pattern of market destinations served by the sales from a particular quarry or group of quarries.
Apportionment	The rate for which the mineral planning system requires provision to be made, in Development Plans, for the supply of aggregates from a given area or region. This may be expressed either in terms of millions of tonnes over a specified period, and/or as an averaged 'annual apportionment' in millions of tonnes per year. In Wales, apportionments are defined in the Regional Technical Statements, but only for areas in which the current landbank (see below) is less than 15 years for crushed rock and 12 years for sand & gravel (these figures being the minimum landbank requirements (10 and 7 years respectively) plus the five year review period for the RTS).
Resources (of primary aggregate)	Geological materials, including rocks and naturally occurring sand & gravel, which are capable of being used as aggregates.
Permitted Reserves (of primary aggregate)	Aggregate resources which have the benefit of planning permission for the winning and working of minerals.
Landbank (of primary aggregate reserves)	In general, a landbank is a stock of planning permissions for the winning and working of minerals within a specified area, expressed both in millions of tonnes and in terms of the number of years supply which they represent. Depending on national policy requirements, the latter may be calculated either in terms of the annual apportionment for that area (where this is defined), or on the basis of recent rates of production (typically the average of the last three years). Also depending on national policy, the landbank may be required to include or to exclude "dormant reserves" (i.e. those at sites with dormant planning permissions).
Current Landbank (of primary aggregate reserves)	In MTAN1, this is defined as " <i>the sum of all permitted reserves at active and inactive sites at a given time and for a given area</i> ", and is required to be based on " <i>the latest 3 years production figures</i> ". [Production, in this case, usually being represented by sales].
Dormant Landbank (of primary aggregate reserves)	Although this term is not actually used, MTAN1, requires "dormant reserves" to be " <i>clearly shown in the landbank calculations as a separate category</i> ". Since, by definition, no production figures are available for individual sites in this category, the number of year's supply which they represent can only be expressed in terms of the current rates of production elsewhere in the area or region in which they are located.
Future Landbank (of primary aggregate reserves)	In MTAN1, the Future (or 'Extended') Landbank is defined as " <i>land specifically allocated for the working of aggregates</i> ". This refers to site allocations for future aggregate extraction that are made within Local Development Plans. By definition, sites which subsequently gain planning permission move from the Future Landbank to the Current Landbank.
Active Site	Referred to, but not defined in the Environment Act 1995, active sites in Wales have since been explicitly defined by the Town and Country Planning (Fees for Applications and Deemed Applications) (Amendment No.2) (Wales) Regulations 2006 as sites where " a) <i>development to which the relevant mineral permission or landfill permission relates is being carried out to any substantial extent; or b</i>) <i>other works to which a condition attached to such permission are being carried out to any substantial extent</i> ". "Substantial extent" is not defined in either the Environment Act or the Welsh regulations, but relevant guidance is provided in Minerals Planning Guidance Note 14 (MPG14): Environment Act 1995:- Review of Mineral Planning Permissions.

Evaluation of the Regional Aggregate Working Parties (RAWPs) in Wales

Inactive Site	Defined by the Town and Country Planning (Fees for Applications and Deemed Applications) (Amendment No.2) (Wales) Regulations 2006 as one <i>"which is not an active site"</i> , as defined above. Inactive sites thus include, but are not limited to, those which are classified under the Environment Act 1995 as being dormant (see below).
Dormant Site	As defined in the Environment Act 1995, this refers specifically to quarries with mineral permissions granted between 30 th June 1948 and 22 nd February 1982 (i.e. "Phase I" and "Phase II" sites, as defined in the Act) where no minerals development was carried out to any substantial extent in, on, or under the site at any time in the period beginning on 22 February 1982 and ending with 6 June 1995. Since 1 st November 1995 it has not been lawful to recommence or carry on working a dormant site until full modern planning conditions have been approved by the Mineral Planning Authority (MPA). It therefore follows that, although some active quarries may fall into the above definition of 'dormant' sites, by virtue of being reactivated following an earlier period of inactivity, if they are now operating lawfully in accordance with modern planning conditions, they should now fall under the definition of 'active sites'.

APPENDIX A: LIST OF DESK STUDY RESOURCES

Key Government Policy and Guidance:

WALES

- WELSH ASSEMBLY GOVERNMENT (2002) **Planning Policy Wales**
- WELSH ASSEMBLY GOVERNMENT (2004) **People, Places, Futures: The Wales Spatial Plan**
- SOUTH EAST WALES STRATEGIC PLANNING GROUP (2000) **Strategic Planning Guidance for South East Wales**
- SOUTH WEST WALES STRATEGIC PLANNING GROUP (2000) **Regional Planning Guidance for South East Wales**
- NORTH WALES REGIONAL PLANNING GROUP (2002) **Regional Planning Guidance for North Wales**
- WELSH ASSEMBLY GOVERNMENT (2002) **Wise About Waste: The National Waste Strategy for Wales**
- WELSH ASSEMBLY GOVERNMENT (2000) **Minerals Planning Policy Wales**
- WELSH ASSEMBLY GOVERNMENT (2004) **Minerals Technical Advice Note (Wales) 1: Aggregates**
- WELSH ASSEMBLY GOVERNMENT (2002) **Sand and Gravel Supply for South East Wales – Position Statement**
- WELSH ASSEMBLY GOVERNMENT (2004) **Interim Marine Aggregates Dredging Policy South Wales: Bristol Channel and Severn Estuary**
- SOUTH WALES REGIONAL AGGREGATES WORKING PARTY (2007) **Consultation Draft Regional Technical Statement (South Wales)**
- NORTH WALES REGIONAL AGGREGATES WORKING PARTY (2008) **Consultation Draft Regional Technical Statement (North Wales)**

ENGLAND

- OFFICE OF THE DEPUTY PRIME MINISTER (2003) **National and Regional Guidelines for Aggregates Provision in England 2001-2016**
- DEPARTMENT FOR COMMUNITIES AND LOCAL GOVERNMENT (2006) **Minerals policy Statement 1: Planning and Minerals**
- DEPARTMENT FOR COMMUNITIES AND LOCAL GOVERNMENT (2008) **Revised National and Regional Guidelines for Aggregates Provision in England: 2005-2020 – Consultation Draft**

SCOTLAND

- SCOTTISH EXECUTIVE (2004) **National Planning Framework for Scotland**
- SCOTTISH EXECUTIVE (2006) **Scottish Planning Policy 4: Planning for Minerals**

Policy-oriented Research:

- THOMPSON, A., HINE, P.D., MARSAY, A. AND CLAYTON.J. (2000) **Appraisal of Land Based Sand and Gravel Resources in South-East Wales.** National Assembly for Wales Research Report. Symonds Group Ltd., East Grinstead.
- THOMPSON, A., KNAPMAN, D. & PETHICK, J. (2002) **Comparative Impact Assessment of Land & Marine Sand & Gravel in South East Wales.** Report to the Welsh Assembly Government. Symonds Group Ltd., East Grinstead.
- SYMONDS GROUP LTD., (2002) **Survey of Arisings and Use of Construction and Demolition Waste in England and Wales in 2001.** Report to the Office of the Deputy Prime Minister.
- SYMONDS GROUP LTD., (2002) **Survey of Arisings and Use of Secondary Materials as Aggregates in England and Wales in 2001.** Report to the Office of the Deputy Prime Minister.
- THOMPSON, A., HINE, P., CLAYTON, J. AND STOWE, R. (2003) **Planning for the Supply of Natural Building and Roofing Stone in England and Wales.** Research Report to the Office of the Deputy Prime Minister.
- ARUP, (2003) **Establishing a Methodology for Assessing Aggregates Demand and Supply (EMAADS).** Report for the Welsh Assembly Government.
- ARUP, (2004) **Improving the Information Base on Secondary Minerals / C&D Waste for Use as Aggregate in Wales.** Aggregates Levy Sustainability Fund for Wales.
- THOMPSON, A., BURROWS, A, FLAVIN, D. AND WALSH, I., (2004) **The Sustainable Use of High Specification Aggregates in England.** Report to the Office of the Deputy Prime Minister and the Minerals Industry Research Organisation. Capita Symonds Ltd., East Grinstead.
- ENVIROS CONSULTING LTD., (2005) **Implementing the Methodology for Assessing the Environmental Capacity for Primary Aggregates (IMAECA).** Report for the Welsh Assembly Government.
- BEEDELL, J. & YATES, C. (2005) **Survey of the Arisings and Use of Construction, Demolition and Excavation Waste, Quarry Waste and Dredging Waste as Aggregate in Wales in 2003.** Smiths Gore Report for the Welsh Assembly Government.
- QUARRY PRODUCTS ASSOCIATION (2006) **Analysis of Demand and Consumption Estimates for Primary and Secondary Aggregates in Wales.** Unpublished report for North and South Wales Regional Aggregate Working Parties. Referenced in North Wales Regional Technical Statement: Consultation Draft (2008) and South Wales Regional Technical Statement: Consultation Draft (2007).
- HOCKLEY, K. & BUTLER, S. (2007) **Survey of the Arisings and Use of Aggregates from Construction and Demolition Waste, Excavation Waste, Quarry Waste and Dredging Waste in Wales in 2005.** Faber Maunsell Report for the Welsh Assembly Government.
- MANKELOW, J. M., SEN, M. A., HIGHLEY, D. E., HOBBS, S. F. & EDWARDS, C. E. (2007) **Collation of the Results of the 2005 Aggregates Minerals Survey for England and Wales.** Report for the Department of Communities and Local Government. British Geological Survey.

Reports produced by the RAWPs:

The following documents have been produced by the North Wales Regional Aggregate Working Party and can be found at www.nwrawp-wales.org.co.uk. Minutes from North Wales RAWP meetings, North Wales RTS Technical Sub-group meetings and North Wales RTS Member Forums are also available on the website.

- **Interim Report** (1976)
- **Regional Commentary** (1981)

- **Report on Aggregates Monitoring Surveys** (1985, 1987, 1989 and 1993)
- **Regional Commentary** (1988 and 1992)
- **Annual Reports** (1989 – 2006); including the following data:
 - Production, sales and reserves of primary (crushed rock and sand & gravel) and secondary aggregates
 - Monitoring of planning permissions affecting the reserve of mineral
 - Monitoring of progress of Unitary Authorities with their development plans
 - Monitoring of waste arising from construction and demolition activities
- **Guidelines for Aggregate Provision in North Wales** (1995)
- **Regional Technical Statement** (2008) & related documents:
 - RTS – Draft for Public Consultation
 - Issues Paper
 - Memorandum of Understanding (Members Forum)

The following documents have been produced by the South Wales Regional Aggregate Working Party and can be found at www.swrawp-wales.org.co.uk. Minutes from South Wales RAWP meetings, South Wales RTS Technical Sub-group meetings and South Wales RTS Member Forums are also available on the website.

- **Interim Report & Supplement** (1977)
- **Regional Commentary** (1980)
- **Aggregates Monitoring Surveys** (1981, 1985 and 1989); Analysis and Commentary
- **Marine Dredging** (1989)
- **Progress Report** (1990-1991 and 1992)
- **Aggregates Minerals Report** (1993)
- **Annual Reports** (1995 – 2006); including the following data:
 - Production, sales and reserves of primary (crushed rock and sand & gravel) and secondary aggregates
 - Marine-won aggregate arisings
 - Monitoring of planning permissions affecting the reserve of mineral
 - Monitoring of progress of Unitary Authorities with their development plans
 - Monitoring of waste arising from construction and demolition activities
- **Guidelines for Aggregates Provision in South Wales** (1995)
- **Regional Technical Statement** (2007) & related documents:
 - Issues Paper
 - Options Paper
 - Critical Path Analysis
 - Draft RTS Consultation Responses
 - Memorandum of Understanding (Members Forum)

APPENDIX B: LIST OF STAKEHOLDERS

Stakeholders contacted to complete the Questionnaire

Action Groups
Aggregates Researchers
British Geological Survey
Countryside Council for Wales
Elected Members
End user of aggregates - Civil Engineering Companies
End user of aggregates - Highways Maintenance Contractors
End users of Aggregates - Civil Engineering and Construction Trade Associations
English RAWP Technical Secretaries
Environment Agency Wales
Environmental organisations
Independent Quarrying companies
Marine Dredgers
Marine Aggregate Researchers
National Park Authorities
North Wales RAWP Technical Secretary and Chair
Quarrying Industry - Trade Associations (QPA, BAA)
Recycled and Secondary Aggregate Producers (colliery spoil, slate waste, steel & BF slags),
Crushers and Screeners
South Wales RAWP Technical Secretary and Chair
Transporters of aggregates - Research groups
Transporters of aggregates - Rail Freight Industry
Transporters of aggregates - Road Haulage Trade Association
Unitary Authority Mineral Planners
Unitary Authority - Highways and Streetworks divisions
Waste Sector Policy / Guidance and Research groups
Welsh Assembly Government

Stakeholders who attended detailed Discussion Groups

Current RAWP Technical Secretary and Chair for South Wales
Current RAWP Technical Secretary for North Wales
English RAWP Technical Secretaries
Quarry Products Association Wales
British Aggregates Association
British Geological Survey
Welsh Assembly Government
North Wales Unitary Authority Mineral Planners
South Wales Unitary Authority Mineral Planners
National Park Authorities and Council for National Parks

Environment Agency Wales
Countryside Council for Wales

Stakeholders who attended wider Stakeholder Workshops

Welsh Assembly Government
North Wales Unitary Authority Mineral Planners
South Wales Unitary Authority Mineral Planners
Current RAWP Technical Secretary for South Wales
Welsh Local Government Association
Quarry Products Association Wales
Environment Agency Wales
Welsh Environment Trust
Snowdonia National Park Authority
Institution of Civil Engineers
Constructing Excellence Wales
Network Rail

APPENDIX C: QUESTIONNAIRE SENT TO STAKEHOLDERS

CAPITA SYMONDS

Evaluation of Welsh Regional Aggregates Working Parties (RAWPs) (Research for the Welsh Assembly Government)

Background to the Research

As you may be aware, the Regional Aggregate Working Parties (RAWPs) were established in the early 1970s. Their role is to aid the management of the supply of aggregates so as to maintain an adequate security of supply for the construction industry through monitoring demand and supply by annual surveys of reserves and production.

Following devolution, the Welsh Assembly Government has followed a rather different path, to that of England, in its policies for minerals planning, seeking alternative ways of maintaining an adequate supply of aggregates whilst giving much greater weight to environmental and wider sustainability issues.

In Wales, for example, much further progress has been made with the implementation of a national approach to the use of environmental capacity indicators in aggregates supply policies and the draft Regional Technical Statements are driving the move towards this. Additionally, the proximity principle is being used to assess apportionments and set aggregates supply and safeguarding policies within individual Local Development Plans.

Together, these various changes amount to a potentially significant shift in the workings of the managed aggregate supply system in Wales and, in view of this, the Welsh Assembly Government considers that it is also timely to reassess the role of the RAWPs and their technical secretaries, as part of the overall system. The Assembly has therefore commissioned this research project, being undertaken by Capita Symonds Limited, the specific aim of which

'carry out a thorough review of the objectives and role of the RAWPs in ensuring a sustainable supply of aggregates for Wales. This to include the work and performance of the RAWPs and the provision of the secretariat and technical services necessary for their effective functioning.'

Your Involvement in this Study

Whilst some of the research will be based on factual information regarding the historical and recent performance of the RAWPs, we are also keen to gather more subjective views from those, such as yourself, who either work within or are affected by the aggregates supply system. We would therefore both welcome and appreciate your input to this process by completing your contact details and the brief questionnaire contained on the next worksheets (just click on the gold **Contact Details** and the orange **Questionnaire** tabs, below). ***If, for any reason, you don't think you can answer the questions, we would be grateful if you could please explain why at Question 0.0 and then send the form back as a 'nil return'.*** Your answers can be as brief or as long and detailed as you like (don't worry if your answers are longer than the space displayed in the box). Please note that the other three worksheets (blue tabs) simply contain background information that you might find helpful to refer to. If you have any queries about completing the form, or if you would prefer to receive a printed copy, please do not hesitate to contact us.

When you have finished, please save the spreadsheet and return a copy of it, by Friday 22nd February, to:

kate.harris@capita.co.uk

Thank you for your valuable contribution to this study,

Yours sincerely

Dr. Alan Thompson, Associate Director, Capita Symonds Limited

(working on behalf of the Welsh Assembly Government)



Llywodraeth Cynulliad Cymru
Welsh Assembly Government

Contact details and background information

Thank you for your assistance in this study. It would be very helpful if you would give your name and contact details so that if we have any need to follow up on any of your answers, we know who to contact.

Your Name	
Organisation	
Position	
Telephone Number	
Email	

Nil Return	
0.0	If you consider that you are unable to answer the following questions, it would be helpful if you could briefly explain why in the box below (e.g. because you have not heard of RAWPs or you have no involvement in the supply or use of aggregates), and then send the form back to us leaving the rest of the boxes blank (except for your contact details on the orange tab, below). This will be of much more use to us than no response at all. <i>Many thanks</i>

Part 1: The Existing Welsh RAWPs	
1.1	At present, Wales is served by two RAWPS (North and South). Do you think this is a good arrangement? <i>(If not, what would be a better solution, and why?)</i>
1.2	The existing RAWP memberships are shown on the blue worksheet tab marked " RAWP Memberships ". Do you think these provide a sufficiently balanced and complete representation of relevant stakeholders? <i>(if not please discuss)</i>
1.3	The current designated functions of the Welsh RAWPs are given on the blue worksheet tab marked " RAWP functions ". What changes, if any, do you think need to be made to these requirements? <i>(and why?)</i>

Part 2: The Role of the Technical Secretaries to the Welsh RAWPs	
2.1	At present, each Welsh RAWP is served by a Technical Secretary, either drawn from one of the constituent MPAs or contracted out to an appropriate specialist. Which of these (or any alternative) solutions do you think is the most suitable? <i>(and why?)</i>
2.2	The current terms of reference of the Technical Secretaries are given on the worksheet tab marked " Tech Secretaries ". Do you think these are all appropriate and necessary? <i>(If not please give your suggestions for any changes or additions).</i>
2.3	Do you think it would be necessary, useful or unnecessary for the RAWP Technical Secretaries to provide a supportive advisory role to their constituent MPAs on minerals planning issues?

Part 3: The Existing Managed Aggregate Supply System In Wales	
3.1	The existing aggregates supply system in Wales is based on the assumption of only very small increases in demand for land-won primary aggregates and that any changes in the overall level of demand will largely be able to be accommodated by increased supplies from secondary and recycled sources. How well do you think this system would be able to cope if the overall demand for aggregates from sources in Wales were to experience a steady and sustained increase amounting to, say, 30% above current levels, over the next decade? <i>(NB this figure is purely illustrative - it is not a prediction!)</i>
3.2	How well do you think this system would be able to cope if the overall demand for aggregates from sources in Wales were to experience a high degree of fluctuation over the next decade, for example with increases or decreases of 30% from year to year? <i>(Again, this is not a prediction!)</i>

Part 4: Exploring the Alternatives

(If you consider no changes are necessary, please say so; If you are not able to provide suggestions, just leave blank)

4.1 What alternative systems (if any) would you suggest for managing the provision of aggregates in Wales in a better or more effective way than the present system? *(in considering this, please consider the possibility of not having a managed system at all (i.e. with no apportionments) and simply dealing with minerals planning applications on their individual merits, like any other type of application)*

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4.2 What specific advantages would your alternative system(s) provide? *(for example, improved sustainability, a better ability to represent the views of the local community, reduced environmental effects or reduced costs,)*

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4.3 What role (if any) would you see for the RAWPs in your suggested alternative system(s)?

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4.4 What role (if any) would you see for the RAWP Technical Secretaries in your suggested alternative system(s)?

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4.5 How well do you think your alternative system(s) would cope with the scenario of steadily increasing demand, as described in Q 3.1, above?

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4.6 How well do you think your alternative system(s) would cope with the scenario of highly volatile demand, as described in Q 3.2, above?

--

4.7 Finally, if you have any other observations that you think would be helpful to the Assembly regarding the Welsh RAWPs, please note these below.

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APPENDIX D: AGENDA AND QUESTIONS FOR CONSIDERATION PROVIDED AT THE WORKSHOPS

AGENDA

- Welcome by WAG
- Introduction to the project by Capita Symonds, including a summary of views expressed during stakeholder meetings
- First 'Breakout Session' – Existing Procedure: Role of the RAWPs and Technical Secretaries
- Recap
- Second 'Breakout Session' – Possible Options for Future Policy and Procedure
- Summing up: What next - where do we go from here?

FIRST BREAKOUT SESSION: QUESTIONS FOR DISCUSSION

Role of the RAWPs

1. What is the main purpose and value of the RAWP meetings in your view? What does your ideal RAWP meeting include?
2. At present Wales is served by two RAWPs (North and South) – is this a good arrangement? What would work better? Should there be a better mesh with the transport and waste regions in Wales?
3. Is the membership of the RAWPs about right or should membership be widened? Is there adequate consultation / public involvement?
4. Is knowledge of the work of the RAWPs disseminated well or could this be better (e.g. would it be useful to produce a 'Rough Guide to RAWPs' for new RAWP members, elected members etc? Also, what would be the value of a formal constitution)?
5. Is the data that the RAWPs provide adequate and sufficient (e.g. should data on the transport of aggregate and end uses also be gathered? Is the frequency of survey about right)?

Role of the Technical Secretaries

1. Are the current terms of reference for the Technical Secretaries and the level of support provided to them acceptable? If not, how could these be improved?
2. What level of support should the Technical Secretaries provide to the Unitary Authorities (UAs)? What has worked best in the past?
3. How should the Technical Secretaries manage, make use of and present the data collected? Is this data adequate and sufficient?

SECOND BREAKOUT SESSION: QUESTIONS FOR CONSIDERATION

Future Policy

1. What improvements could be made to the Regional Technical Statements (e.g. should they have policy status, rather than being guidance)?
2. Will the RTS enable UAs to deliver a more sustainable pattern of supply than that which presently exists? Are there any difficulties in implementing this approach? Is there a need for more detailed technical geological data to tackle issues such as safeguarding, *per capita* apportionment and environmental capacity and who should be providing this data?
3. What role should the RAWP have in implementing and reviewing the RTS?
4. What role should the Technical Secretaries have in implementing and reviewing the RTS?
5. What role should the UAs have in implementing and reviewing the RTS?

Future Procedure

1. Would there be value in setting up Sub-regional UA groups, as a tier between the RAWPs and each individual UA (e.g. in order provide strategic minerals planning advice to the UAs)?
2. What would be the ideal membership and remit of these groups? And who would provide the technical expertise (e.g. the Technical Secretaries to provide consistency and/or additional staff/consultants)?
3. Who should the Technical Secretaries and/or other technical staff/consultants be funded by? And where should they be based (e.g. within UAs, WAG)?

APPENDIX E – REGIONAL AGGREGATES WORKING PARTIES (RAWPS) (REPRODUCTION OF MTAN 1, ANNEX A)

A1 Membership

There are two RAWPs in Wales and their membership is drawn from officers of the mineral planning authorities, the aggregates and recycling industry, the British Geological Survey, Environment Agency Wales, Countryside Council for Wales, the Welsh Assembly Government, the Office of the Deputy Prime Minister together with other Government Departments.

A2 Aggregates Monitoring Surveys

Aggregates Monitoring Surveys are undertaken by the RAWPs to provide details of the regional and national production and consumption of aggregates. Main surveys are undertaken on a four yearly cycle for England and Wales and also provide information on the regional distribution of aggregates production. The last completed survey was carried out for 2001 and the national collation was published by the Office of the Deputy Prime Minister. The information is collected from minerals producers by the mineral planning authorities in a survey collated regionally by the Regional Aggregates Working Parties. Since the early 1990s, the RAWPs have also undertaken annual surveys of aggregates production and reports summarising aggregates production and reserves in each mineral planning authority are published each year.

A3 Future Role of the RAWPs Monitoring Aggregates

- To continue to monitor production of primary and secondary aggregates;
- To continue to monitor the distribution of primary and secondary aggregates including imports and exports of aggregates;
- To continue to collect data on primary aggregates reserves at regional and mineral planning authority levels;
- To monitor the generation of all wastes that have potential for use as aggregates;
- To monitor the generation, re-use and recycling of secondary materials and recycled aggregates from construction and demolition waste;
- To monitor UDPs and future development programmes and major proposals to assess the regional demand for aggregates and determine potential areas where there could be a shortfall of supply.

Assessment of Aggregates Demand and Supply

- To assess the environmental capacity of MPA areas to meet the demand for aggregates;
- To assess the reserves of primary aggregates in active and dormant sites and the likelihood of dormant sites being reactivated;
- To assess the use of secondary and recycled aggregates and consider ways to improve data collection and to increase their use to replace primary resources;
- To assess the provision/capacity within each unitary authority area to recycle construction and demolition waste, identifying scope to improve the recycling and reuse of aggregates by examining the extent of landfill disposal (and use on exempt sites) and locations of recycling facilities;
- To assess the arisings of construction and demolition waste, including road planings and their reuse and recovery as aggregates.

Regional Technical Statements for Aggregates

To provide a 5-yearly Regional Technical Statement (within 18 months of the completion of the study of environmental capacity in Wales) to set out:

- The results of the regional assessment of the environmental capacity of each MPA to contribute to an adequate supply of primary aggregates;

- To provide a strategy for the provision of aggregates in the region in accord with that regional assessment, with allocations of future aggregates provision for each mineral planning authority area to provide a strategic basis for future development plans;
- To assess current and future imports and exports of aggregates;
- To assess the current and future contribution of marine aggregates;
- To advise the Assembly on the potential in each region in Wales for increasing the use of alternative materials to replace primary aggregates.

Joint Voluntary Arrangements of Local Authorities

- The Technical Secretariat of the RAWPs will administer the arrangements for establishing joint voluntary arrangements of local authorities to assess the draft Technical Statement for Aggregates to provide a context for proper consideration of land use issues relating to aggregates provision in unitary development plans. All local authorities in the region should be represented with a view to reaching a consensus about the recommendations for the region in the Regional Technical Statement for Aggregates. This will then need to be agreed by each constituent local authority;
- Each local authority in the region should then include in its own unitary or local development plan elements of the agreed Regional Technical Statement that are germane (relevant to!) to its area at the earliest opportunity;
- If the local authorities reach no agreement or if individual local authorities do not accept the Regional Technical Statement, the Welsh Assembly Government will consider its default powers to intervene in the planning process as a last resort.

APPENDIX F: ENVIRONMENTAL CRITERIA AND AGGREGATES CATEGORIES USED IN EMAADS/IMAECA

EMAADS (2003)

ENVIRONMENTAL CAPACITY ASSESSMENT INDICATORS (Source: EMAADS, Table 4.2)

- A. Extent of settlements in local area
- B. Watercourses at risk from extraction activities
- C. Standard of road network
- D. Agricultural land use class
- E. Nature conservation sites
- F. Historic sites
- G. Rights of Way network
- H. Proximity to National Park / AONB
- I. Proximity to Special Landscape Area / Heritage Coast
- J. Spheres of quarry / pit influence (measured as 3km radius from the centre of existing workings)
- K. Quarry / pit buffer zones (defined in Welsh Assembly Government guidance)
- L. Abandoned / disused workings in the area

IMAECA (2005)

ENVIRONMENTAL INDICATORS (Source: IMAECA, Table 1)

- A. Settlements
- B. Watercourses and resources
- C. Standard of roads
- D. Land use class
- E. Nationally designated conservation sites
- F. Quality of cultural heritage
- G. Public enjoyment of the area: likely visitor levels
- H. Nationally designated landscape areas
- I. Locally designated landscape areas
- J. Current fixed plant or substantial quarry working
- K. Buffer around new and existing quarry workings
- L. Cumulative impact of aggregate industry

AGGREGATE CLASSIFICATION SCHEME (Source: IMAECA, Table 4)

Aggregate Type Class	Description	Notes
1	Carboniferous Sandstones	Predominantly includes greywacke and quartzite sandstone and calcareous sandstone of Carboniferous age and reflects the former and current importance of this rock type to aggregate production for general and high specification use in South Wales, particularly in the Westphalian Pennant Sandstone Formation.
2	Pre-Carboniferous Sandstones	Includes Pre-Carboniferous (Pre-Cambrian-Devonian) sandstones, calcareous sandstones and sandstones & conglomerates, frequently deformed, intercalated with unsuitable lithologies, impersistent or poorly mapped and generally of little value for aggregate, except in local or isolated areas where better quality aggregate is absent.
3	Post-Carboniferous Sandstones	Limited in thickness and geographical extent and includes post-Carboniferous sandstones, almost exclusively Triassic in age, of general low aggregate quality.
4	Pre-Carboniferous Sandstones & Siltstones & Sandstone & Mudstone	Includes Pre-Carboniferous (Pre-Cambrian-Devonian) sandstones & siltstones and sandstones & mudstones, occupying much of central Wales. In other areas of Wales these rock types would be considered to have low aggregate potential as other, better quality aggregate sources would be available. For small quantity extraction, however, it is possible that some sandstones with mudstones or mudstones with sandstones would be workable in localized areas.

Evaluation of the Regional Aggregate Working Parties (RAWPs) in Wales

5	Carboniferous Limestones & Dolomites	Includes, predominantly, Carboniferous Limestone, together with Carboniferous dolomites, dolomitic limestones, limestones & mudstones and limestone & sandstones, extensively used as general aggregate in South Wales and North-East Wales.
6	Ordovician-Devonian Limestones	Includes limited thicknesses of Ordovician, Silurian and Devonian limestones, limestone & mudstone and limestone & sandstone, particularly in the Welsh borders.
7	Jurassic Limestones	Includes Jurassic limestones and limestones & mudstones in South Wales where they are primarily used for cement production and are not generally suitable for aggregate use, except as general fill, due to their shaly character.
8	Igneous Rocks	Includes all the igneous rocks in Wales, both intrusive and extrusive. With some notable exceptions, particularly amongst the granites and dolerites, many of the igneous rocks occupy limited outcrop areas in often remote or inaccessible areas in Wales and have been little exploited.
9	Alluvium	Comprises Holocene alluvium, found particularly on the valley floor of the major river systems radiating outwards from central Wales, and in coastal areas where it is often undifferentiated from estuarine mud on older geological maps. Many of the major valleys, especially the Dyfi, Tyfi, Towy, Usk, Wye and Severn, contain significant sand and gravel in their middle reaches.
10	River Terrace Gravels	Includes Late Devensian to Holocene river terrace sequences composed of sand and gravel bordering many of the river systems, especially in the Usk, Wye and Severn.
11	Glacial Sands & Gravels	Includes a wide variety of ice-front alluvial fans, sandur and esker and kames systems, particularly in North-East Wales and the borders and locally elsewhere.
12	No Aggregate Potential	This class may be still contain small isolated areas or potential resource not currently recorded by geological mapping.

APPENDIX G: EVIDENCE FOR THE RAWPS MEETING THEIR FUNCTIONS

Sources

- North Wales Regional Aggregates Working Party: Annual Report 2004
- North Wales Regional Aggregates Working Party: Annual Report 2005
- North Wales Regional Aggregates Working Party: Annual Report 2006
- North Wales Consultation Draft Regional Technical Statement 2008
- South Wales Regional Aggregates Working Party: Annual Report 2004
- South Wales Regional Aggregates Working Party: Annual Report 2005
- South Wales Regional Aggregates Working Party: Annual Report 2006
- South Wales Consultation Draft Regional Technical Statement 2007

NB: Years in brackets following each quote equate to the year of the Annual Report that that particular quote refers to.

Criterion 1	To continue to monitor production of primary and secondary aggregates	
	North Wales RAWP	South Wales RAWP
<i>Monitoring of the production of primary aggregates:</i>		
	<ul style="list-style-type: none"> - Production, in the form of sales, is reported for crushed rock and sand and gravel by Authority: (2006, 2005 and 2004) - Monitoring of planning applications for primary extraction submitted annually by Authority: (2006 and 2005) - "Insufficient information has been supplied by the MPAs to be able to report systematically on the planning decisions made in 2004": (2004 only) - List of primary aggregate production sites provided: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Map of primary aggregate production sites (excluding marine): (2006, 2005 and 2004) - Regional production of crushed rock, land won- and marine-dredged sand and gravel reported: (2006, 2005 and 2004) - Monitoring of planning applications for primary extraction submitted annually by county area: (2006, 2005 and 2004) - List of primary aggregate production sites provided: (2006, 2005 and 2004)
<i>Monitoring of the production of secondary aggregates</i>		
	<ul style="list-style-type: none"> - List of secondary aggregate production sites provided: (2006, 2005 and 2004) - Secondary material produced in the region, that is suitable for use as aggregate, is discussed: (2006, 2005 and 2004) - Sales and reserves of secondary material [slate (for aggregate purposes) and clay and shale (for construction purposes)] are reported as tonnages: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - List of secondary aggregate production sites provided: (2006, 2005 and 2004) - Secondary material produced in the region, that is suitable for use as aggregate, is discussed: (2006, 2005 and 2004) - Regional sales and reserves of secondary material reported: (2006, 2005 and 2004) - Production, in the form of Regional sales, reported: (2006, 2005 and 2004)

Criterion 2	To continue to monitor the distribution of primary and secondary aggregates including imports and exports of aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Export figures are reported and discussed: (2005 only (AM survey)) - Method of the export of aggregate from the region is reported and discussed: (2005 only (AM survey)) 	<ul style="list-style-type: none"> - Export figures are reported and discussed: (2005 only (AM survey)) -

Criterion 3	To continue to collect data on primary aggregates reserves at regional and mineral planning authority levels	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Monitoring of planning applications for primary extraction submitted annually by Authority: (2006 and 2005) - "Insufficient information has been supplied by the MPAs to be able to report systematically on the planning decisions made in 2004": (2004 only) - All aggregate reserves by active, inactive and dormant sites, discussed and reported by MPA and regional total: (2006 and 2005) - Crushed rock reserves by active and dormant sites reported at sub-regional (NE Wales and NW Wales) level: (2004 only) - Permitted reserves and landbanks by crushed rock and sand and gravel, discussed and reported by MPA: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Monitoring of planning applications for primary extraction submitted annually by county area: (2006, 2005 and 2004) - All aggregate reserves by active, inactive and dormant sites, discussed and reported by MPA and regional total: (2006, 2005 and 2004) - Crushed rock reserves reported by MPA: (2006, 2005 and 2004) -

Criterion 4	To monitor the generation of all wastes that have potential for use as aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - The use of slate waste, and shale and clay production as a secondary material are discussed and sales estimates reported: (2006, 2005 and 2004) - Volume of secondary slate sales and reserves reported: (2006, 2005 and 2004) - Production of clay and shale considered suitable for construction reported and discussed: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Evidence that secondary aggregates have been considered and sales monitored: (2004 only) - No monitoring (with the exception of road planings) of the production of secondary and recycled aggregates (2004 only) - Acknowledges external research work into recycled and secondary aggregates by the Welsh Environment Trust, suggesting investigation into future opportunities: (2005 only) - Arisings and re-use of secondary material discussed in relation to Faber Maunsell 2007 report findings: (2006 only) -

Criterion 5	To monitor the generation, re-use and recycling of secondary materials and recycled aggregates from construction and demolition waste	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Arisings and re-use discussed in relation to Faber Maunsell 2007 report findings and Draft RTS estimations: (2006 and 2005) - National findings of the Smiths Gore report (2005) (no regional breakdown provided) are reported: (2006 and 2005) - No reference in 2004. 	<ul style="list-style-type: none"> - Arisings and re-use of secondary material discussed in relation to Faber Maunsell 2007 report findings: (2006 only) - Considered [discussion of the Welsh Environment Trust report, 2007]: (2006, 2005 and 2004) - Monitoring aggregate recycling industry through presence on appropriate research steering committees: (2005 and 2004) -

Criterion 6	To monitor UDPs and future development programmes and major proposals to assess the regional demand for aggregates and determine potential areas where there could be a shortfall of supply	
	North Wales RAWP	South Wales RAWP
	<i>Monitor UDPs and future development programmes and major proposals to assess the regional demand for aggregates:</i>	
	<ul style="list-style-type: none"> - Discussion of major development proposals in each MPA: (2006 and 2005). No reference in 2004. - Unitary Development Plan updates included for each MPA: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Discussion of major development proposals in each MPA: (2006, 2005 and 2004) - Unitary Development Plan updates included for each MPA: (2006, 2005 and 2004)
	<i>Determine potential areas where there could be a shortfall of supply:</i>	
	<ul style="list-style-type: none"> - Development of the RTS (with the aid of the EMAADS and IMAECA projects) investigate areas where shortfall of supply might occur due to the lack of capacity for an MPA to meet demand: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Development of the RTS (with the aid of the EMAADS and IMAECA projects) investigate areas where shortfall of supply might occur due to the lack of capacity for an MPA to meet demand: (2006, 2005 and 2004)

Criterion 7	To assess the environmental capacity of MPA areas to meet the demand for aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Update of relevant research projects including those with relevance to the consideration of environmental capacity [EMAADS and IMAECA]: (2006, 2005 and 2004) - Development of the RTS with the aid of IMAECA: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - Update of relevant research projects including those with relevance to the consideration of environmental capacity [EMAADS and IMAECA]: (2006, 2005 and 2004) - Development of the RTS with the aid of IMAECA: (2006, 2005 and 2004)

Criterion 8	To assess the reserves of primary aggregates inactive and dormant sites and the likelihood of dormant sites being reactivated	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - All aggregate reserves by active, inactive and dormant sites, reported by MPA and regional total: (2006 and 2005) - Crushed rock reserves by active and dormant sites reported at sub-regional (NE Wales and NW Wales) level: (2004 only) - Likelihood of reactivation not specifically discussed, but landbanks including reserve figures for dormant sites are reported: (2006 only). No reference in 2005 or 2004. 	<ul style="list-style-type: none"> - All aggregate reserves by active, inactive and dormant sites, by MPA and regional total: (2006, 2005 and 2004) - Survey undertaken; likelihood of re-activation discussed: (2006, 2005 and 2004)

Criterion 9	To assess the use of secondary and recycled aggregates and consider ways to improve data collection and to increase their use to replace primary resources	
	North Wales RAWP	South Wales RAWP
<i>Assess the use of secondary and recycled aggregates:</i>		
-	The type and use of secondary and recycled aggregates available is discussed: (2006, 2005 and 2004)	-
<i>Consider ways to improve the data collection:</i>		
-	No specific commentary: (2006, 2005 and 2004)	-
<i>Increase the use of secondary and recycled aggregates in replacement of primary resources:</i>		
-	No specific commentary: (2006, 2005 and 2004)	-
Considered [discussion of the Welsh Environment Trust report, 2007]: (2006 and 2005) - "The Secretary has maintained close liaison with WET... to promote the use and markets for construction and demolition waste in Wales": (2006, 2005 and 2004)		

Criterion 10	To assess the provision/capacity within each unitary authority area to recycle construction and demolition waste, identifying scope to improve the recycling and reuse of aggregates by examining the extent of landfill disposal (and use on exempt sites) and locations of recycling facilities.	
	North Wales RAWP	South Wales RAWP
<i>Assess the provision/capacity of each UA area to recycle C&D Waste:</i>		
-	Discussed in relation to future development proposals / monitoring of planning applications for secondary aggregate recycling facilities: (2006 and 2005)	-
No evidence of RAWP investigations into future recycling opportunities, although note is given to the attendance of the Chairman at steering group meetings regarding waste production in the construction, demolition and quarry industries: (2004 only) - Discussed in relation to future development proposals / monitoring of planning applications for secondary aggregate recycling facilities: (2006 and 2004)		
<i>Identify scope to improve the recycling and re-use of aggregates by examining the extent of landfill disposal (and use on exempt sites) and locations of recycling facilities:</i>		
-	No specific commentary: (2006, 2005 and 2004)	-
Volume of road planings landfilled reported: (2006, 2005 and 2004)		

Criterion 11	To assess the arisings of construction and demolition waste, including road planings and their reuse and recovery as aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Survey of local MPAs on the arisings / recycling of road planings. Discussion of the volume recycled and their end-use (2006 only): (2006 and 2004) - No survey carried out in 2005, "however it is likely that road planings have been recycled in all areas": (2005 only) 	<ul style="list-style-type: none"> - Survey of local MPAs on the arisings / recycling of road planings. Discussion of the percentage recycled and their end-use: (2006, 2005 and 2004)

Criterion 12	To provide a 5-yearly Regional Technical Statement (within 18 months of the completion of the study of environmental capacity in Wales)	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - North Wales RTS issued for consultation in February 2008 (36 months after publication of the IMAECA report in February 2005) 	<ul style="list-style-type: none"> - South Wales RTS issued for consultation in November 2007 (33 months after publication of the IMAECA report in February 2005)

Criterion 13	set out the results of the regional assessment of the environmental capacity of each MPA to contribute to an adequate supply of primary aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Reported in the Draft RTS as a contributing factor towards the sub-regional apportionment process. 	<ul style="list-style-type: none"> - Reported in the Draft RTS as a contributing factor towards the sub-regional apportionment process.

Criterion 14	To provide a strategy for the provision of aggregates in the region in accord with that regional assessment, with allocations of future aggregates provision for each mineral planning authority area to provide a strategic basis for future development plans.	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Reported in the Draft RTS, as sub-regional apportionment figures. 	<ul style="list-style-type: none"> - Reported in the Draft RTS, as sub-regional apportionment figures.

Criterion 15	To assess current and future imports and exports of aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Current crushed rock export figures from NE Wales are reported: (2005 only) - Future imports and exports considered in relation to sub-regional apportionment figures provided in the Draft RTS. 	<ul style="list-style-type: none"> - No reference to imports/exports in annual reports - Future imports and exports considered in relation to sub-regional apportionment figures provided in the Draft RTS.

Criterion 16	To assess the current and future contribution of marine aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Future contribution considered in relation to sub-regional apportionment figures provided in the Draft RTS. 	<ul style="list-style-type: none"> - Future contribution considered in relation to sub-regional apportionment figures provided in the Draft RTS.

Criterion 17	To advise the Assembly on the potential in each region in Wales for increasing the use of alternative materials to replace primary aggregates	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - The use of alternative materials is discussed and partly measured, but there is no specific commentary regarding the RAWPs direct advice to the Assembly on this matter: (2006, 2005 and 2004) 	<ul style="list-style-type: none"> - "The Secretary has maintained close liaison with Welsh Environment Trust... to promote the use and markets for construction and demolition waste in Wales": (2006, 2005 and 2004) and the use of alternatives is discussed and partly measured, but there is no specific commentary regarding the RAWPs direct advice to the Assembly on this matter: (2006, 2005 and 2004)

Criterion 18	The Technical Secretariat of the RAWPs will administer the arrangements for establishing joint voluntary arrangements of local authorities to assess the draft Technical Statement for Aggregates to provide a context for proper consideration of land use issues relating to aggregates provision in unitary development plans	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Establishment of RTS Members Forum in 2005. - Memorandum of Understanding objectives allows the Forum opportunity to consider, inform and guide the RTS, which will have a significant influence on future local minerals planning. 	<ul style="list-style-type: none"> - Establishment of RTS Members Forum in 2005. - Memorandum of Understanding objectives allows the Forum opportunity to consider, inform and guide the RTS, which will have a significant influence on future local minerals planning.

Criterion 19	Each local authority in the region should then include in its own unitary or local development plan elements of the agreed Regional Technical Statement that are germane to its area at the earliest opportunity.	
	North Wales RAWP	South Wales RAWP
	<ul style="list-style-type: none"> - Guidance is provided within the RTS itself and by the Members Forum, for the inclusion of pertinent elements of the RTS in future UDP development. 	<ul style="list-style-type: none"> - Guidance is provided within the RTS itself and by the Members Forum, for the inclusion of pertinent elements of the RTS in future UDP development.

The Wales Planning Policy Development Programme

This research project has been commissioned and undertaken as part of the Welsh Assembly Government's Wales Planning Policy Development Programme. The programme, originally established in 2000 under the title the Wales Planning Research Programme, is intended to meet the need for evidence based land use planning policy development within the context of the Welsh Assembly Government's principles and priorities.

The Assembly Government's Planning Division is responsible for administering the Wales Planning Policy Development Programme and ensuring that any research or policy implementation work meets the needs of the Welsh Assembly Government.

Evaluation of the Regional Aggregate Working Parties (RAWPs) in Wales

Research is carried out predominantly by external commission, although some projects are undertaken collaboratively with other organisations

Key Objectives

- To focus on distinctive Welsh issues
- To support the development of planning policy
- To provide management information for land use planning policy development
- To develop best practice guidance.

In 2005 a quinquennial review of the research programme was carried out. This identified a number of recommendations including the renaming of the programme to enable not only the funding of planning research but the implementation of policy developed from it.

Further information on the Wales Planning Policy Development Programme can be accessed at:
www.wales.gov.uk/planning

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