Welsh Government Consultation

National Development Framework (formerly Future Wales)

Mobile UK and Mobile Infrastructure Forum Response

November 2026

Introduction

This response outlines the strategic priorities of the Mobile Infrastructure Forum (MIF) and Mobile UK for the revision of the Welsh Government's National Development Framework (Future Wales).

About Mobile UK

Mobile UK is the trade association for the UK's mobile network operators - EE, Virgin Media O2, and VodafoneThree.

Mobile UK's goal is to realise the power of mobile to improve the lives of our customers and the prosperity of the UK.

About the Mobile Infrastructure Forum

The Mobile Infrastructure Forum is comprised of four participant organisations that operate large-scale portfolios of shared macro mobile infrastructure throughout the UK.

The members of the Mobile Infrastructure Forum are Cellnex UK, Cornerstone, Mobile Broadband Network Limited (MBNL), and the Wireless Infrastructure Group (WIG).

Summary of Response

To successfully deliver the goals of the Well-being of Future Generations (Wales) Act, Wales must transition from viewing digital connectivity as a byproduct of growth to treating it as a strategic driver of sustainable regional development.

The Welsh Government cannot expect the country to reap the benefits of digital infrastructure—or predicate its own economic growth and productivity on advanced technologies— while maintaining a planning environment that unintentionally restricts the deployment of that essential infrastructure.

Crucially, because the NDF is a high-level spatial document with a long horizon (targeted for final publication in 2029/30), the MIF and Mobile UK urge the Welsh Government to **implement intermediate technical planning reforms in the interim**. Waiting until 2029/30 is too late; immediate progress should be made by updating Planning Policy Wales (PPW), expanding Permitted Development Rights for telecommunications infrastructure, and regularly updating the Code of Best Practice on Mobile Phone Development for Wales.

Achieving this vision requires the Welsh planning system to adopt the following key recommendations:

- **Critical National Infrastructure (CNI) Designation:** Formally designate digital and telecommunications networks as CNI in Wales. Mobile connectivity must be treated as an essential utility on par with energy, transport, and water.

- **"Infrastructure First" Integration:** Embed telecommunications planning upfront into site allocations and master-planning for housing, employment, and transport developments to eliminate inefficient, retrospective retrofitting.
- **Standardised National Planning Policy for Wales:** Implement a consistent, national development management style policy on digital infrastructure (similar to the statutory NDMP framework in England). Settle common core principles—such as infrastructure sharing, mast upgrades, appearance, and replacement equipment—at the national level via Planning Policy Wales (PPW) and the Code of Best Practice on Mobile Phone Network Development for Wales, leaving local planning authorities to focus strictly on site-specific judgments. This aligns with the planning framework following the revocation of TAN 19 in February 2024.
- **Promote Collaborative Early Notification & Infrastructure Protection:** Update Planning Policy Wales to enable early notification and consultation between developers and mobile network operators during the planning process. This proactively **helps** developers design-in seamless, high-speed mobile connectivity from the outset, preventing new developments from becoming functional 'not-spots, block existing signals, or protecting established networks from accidental signal disruption or displacement. High-level planning frameworks should encourage joint continuity-of-service strategies to protect established networks and commit to a clear reprovision and continuity-of-service strategy if infrastructure is displaced.
- **Coordinate Utility and Power Grid Resilience:** The NDF must address utility interdependencies, particularly the lack of power resilience in the national grid during outages, which significantly strains telecommunications networks. It is not feasible or commercially viable for mobile operators to fund and build duplicate power networks to compensate for grid failings. The NDF must direct the wider national utility and energy strategy to prioritise power grid resilience so that communications remain protected during severe weather events.
- **Support Welsh Topography & Rurality:** Simplify planning rules and support joint public-private initiatives to overcome Wales's unique physical terrain (valleys, mountains, and dispersed populations) and prevent digital exclusion in rural, remote, and designated landscapes.
- **Proportionate Deployment in Sensitive Landscapes:** Establish a balanced planning policy that permits modern infrastructure in National Parks and National Landscapes to sustain tourist economies, seasonal capacity demands, and rural livelihoods without compromising environmental conservation.
- **Connected Transport Corridors:** Align transport and digital planning to guarantee continuous high-quality mobile coverage (including 5G Standalone) along strategic Welsh road and rail corridors to support public safety, passenger productivity, and smart logistics.
- **Early Industry Collaboration:** Integrate targeted technical workshops and roundtable sessions with industry partners and telecommunications operators at the earliest stages of policy formulation to ensure NDF targets are technically and commercially deliverable.

Mobile UK

Mobile Infrastructure Forum

Mobile Infrastructure Forum Consultation Response

Part C

The following questions focus on the role the revised National Development Framework should play in meeting Wales's needs, empowering local government and reducing costs, bureaucracy and duplication within the land use planning system.

Effective Governance

Q40: Do you agree that local councils and regional partnerships should play a stronger role in preparing and delivering the National Development Framework, while reducing unnecessary bureaucracy and duplication? Please explain your views and suggest any improvements.

Yes, stronger local and regional delivery (collaborating with bodies like Ambition North Wales and Cardiff Capital Region) is welcome, but it must operate within a consistent, clear national framework. Since telecommunications networks function nationally and do not respect county boundaries, the NDF must establish the strategic national need for connectivity to prevent fragmentation and duplicate policymaking at local levels.

We strongly support the objective of establishing a nationally consistent telecommunications policy and reducing duplication between planning authorities. To streamline delivery and eliminate the current fragmented patchwork of local policies, we suggest framing the policy recommendations around establishing a robust national telecommunications policy through the revised NDF and Planning Policy Wales (PPW).

This approach should be supported by the regular review and updating of the **Code of Best Practice on Mobile Phone Network Development for Wales**. This ensures that common core principles—such as supporting deployment, upgrades, infrastructure sharing, mast appearance, and the treatment of replacement equipment—are settled at the national level, leaving local planning authorities to focus solely on site-specific planning judgments.

Framing the recommendations around the NDF, PPW, and the Code of Best Practice better aligns with the existing Welsh planning framework—particularly following the revocation of TAN 19 in February 2024—while ensuring that telecommunications guidance remains highly responsive to the rapid pace of future technological change.

The Planning System

Q41: Are there any issues that should be planned for at a Wales-wide level rather than by regional or local plans?

Strategic, cross-boundary utilities—especially telecommunications networks—must be planned at a Wales-wide level. Telecommunications infrastructure operates as an integrated national system that does not conform to administrative local boundaries. A national planning framework is essential to account for Wales's diverse geography, which spans dense urban agglomerations along the southern coast to sparsely populated, topographically challenging rural and mountainous areas.

Furthermore, technological evolution and the higher-frequency spectrum characteristics of 5G necessitate much denser network architecture, requiring both replacement sites and new installations across open and rural landscapes. National policy must establish consistent support for coverage

deployment, network maintenance, and the densification of mobile infrastructure, rather than leaving strategic capacity and coverage decisions to fragmented local plan policies.

Q42: How can overlap and repetition between national, regional and local plans be reduced?

Overlap and repetition can be significantly reduced by defining clear, non-duplicative roles across each tier of the planning hierarchy:

- **The National Development Framework (NDF)** should establish the strategic national need and assign substantial positive policy weight to the deployment, upgrade, and replacement of telecommunications equipment.
- **Strategic Development Plans (SDPs)** should coordinate regional digital growth requirements and align network expansion with regional transport and economic corridors.
- **Local Development Plans (LDPs)** should identify local delivery opportunities and public asset-sharing initiatives without duplicating or rewriting national policy criteria.
- **Development Management** should focus strictly on site-specific technical siting and visual mitigation.

Settle strategic policy principles—such as the balance between digital public benefit and visual impact—at the national level so that local authority planning officers have unambiguous guidance and strategic needs are not re-litigated on an application-by-application basis.

Making Decisions and Delivering Development

Q43: How can the National Development Framework give communities, developers and decision-makers more confidence and certainty about future development?

Confidence and certainty require planning policy to align with the operational realities of modern network deployment. Following site consolidation and the decommissioning of legacy installations, network operators must now deliver network densification to meet exponential end-user demand for data transfer and high-capacity services.

Furthermore, structural post-COVID working patterns mean millions of people now work from home several days a week, permanently shifting daytime data demand from central commercial business districts into residential and suburban neighbourhoods. Because residential environments typically lack tall commercial buildings capable of supporting rooftop installations, operators must deploy streetworks monopoles to provide macro-layer capacity.

The NDF can provide vital certainty by formally recognising digital networks as Critical National Infrastructure (CNI) and embedding an Infrastructure First principle. Crucially, national policy must direct decision-makers to give substantial weight to the significant public benefits of high-quality, secure connectivity over local visual amenity considerations for streetworks installations.

Q44: How can planning decisions be made more quickly while still making sure people have a meaningful opportunity to have their say?

Accelerating planning decisions requires modernising the statutory permitted development regime governing telecommunications under Part 24 of the Town and Country Planning (General Permitted Development) Order (GPDO).

Currently, minor technical adjustments—such as marginal height or width increases to accommodate 5G apparatus and equipment sharing—frequently require Full Planning Permission or Prior Approval. This places a disproportionate administrative burden on local planning authorities (LPAs), consuming scarce planning officer time on technical debates over minor equipment changes rather than strategic development.

By expanding Part 24 permitted development allowances to include minor mast height extensions and replacement ground-based structures without the need for Prior Approval, the Welsh Government can enable faster, more predictable digital deployment while freeing LPA resources to handle major planning proposals. Meaningful public participation can then focus on significant new site installations, where early and transparent developer pre-consultation provides communities with a voice without stalling essential network upgrades.

Q45: What are the main obstacles that stop developments from being delivered once they have planning support?

Once planning consent or prior approval is secured, the two most critical operational obstacles causing substantial deployment delays are Highways Permitting and Power Delivery:

1. **Highways Permitting:** Telecoms installations and streetworks frequently experience severe scheduling delays and inconsistencies across local authority highways departments. Delays in issuing road permits directly prevent operators from executing scheduled engineering works.
2. **Power Infrastructure & Grid Delivery:** Energising a new mobile base station depends on connections from Distribution Network Operators (DNOs), which involve long lead times and secondary highways permits for trenching and grid connection. Delays in grid energisation mean completed masts sit dormant for months.

Protracted post-planning processes directly undermine faster planning decision-making and liberalised permitted development rights. To overcome these delivery barriers, the NDF and Welsh Government must foster coordinated tripartite working protocols between Local Planning Authorities, Highways Departments, utility providers, and Mobile Network Operators (MNOs) to establish certainty and standardise streetworks approvals across Wales.

Strategic Planning and Delivery

Q46: How can the National Development Framework help ensure that infrastructure, such as transport, energy, water and digital networks, is delivered alongside new development?

The NDF should embed Infrastructure First as a core planning principle requiring telecommunications infrastructure to be considered alongside transport, energy and water infrastructure from the earliest stages of plan-making. Policy must also recognise digital networks as CNI, providing positive planning weight and simplified consenting routes to support network upgrades, 5G Standalone, and edge computing across Wales.

The NDF should encourage early and constructive dialogue between developers and digital infrastructure providers to support high-quality deployment.

This issue manifests in three major ways:

1. ensuring new developments with high data demand are planned with optimal connectivity solutions in mind;
2. helping developers design structures that avoid accidentally disrupting local network signals;

3. working collaboratively on redevelopment sites to coordinate the smooth relocation or integration of existing rooftop infrastructure to maintain local service continuity.

To support this collaborative environment, PPW should be updated to encourage early notification protocols and digital connectivity consultations during the pre-application stage. This ensures buildings are well-connected from day one, protects existing local infrastructure from signal blockage, and promotes joint continuity-of-service strategies where relocations are necessary.

Q47: How can the National Development Framework bring together housing, regeneration, transport, economic growth and infrastructure objectives into a clear long-term plan for Wales?

Digital connectivity acts as the foundational cross-cutting enabler uniting housing, decarbonisation, transport, and economic regeneration:

- **Decarbonisation and Transport Reduction:** The structural shift to hybrid and remote working directly reduces daily commuter travel, lowering vehicular carbon emissions and easing congestion across strategic road and rail networks.
- **Housing and Rural Retention:** Reliable digital connectivity affords individuals and families greater flexibility over where they live. Expanding high-capacity rural coverage relieves housing pressure on major urban centres and sustains rural and valley communities by attracting and retaining younger working populations.
- **Balanced Economic Growth:** High-speed mobile connectivity decentralises economic opportunity away from traditional city centre commercial districts, empowering small businesses, local high streets, and remote enterprises across regional Wales.

By affording substantial positive policy weight to telecommunications infrastructure in the NDF, Wales can transform rural and regional economies while creating a more resilient, low-carbon, and geographically equitable society.

Q48: What information and evidence should be used to help shape the revised National Development Framework?

The revised NDF must be informed by forward-looking, technology-led empirical evidence rather than historical usage trends.

Essential evidence streams include:

- **Mobile Network Operator (MNO) Data Usage & Telemetry:** Granular evidence illustrating the permanent migration of data traffic into residential, suburban, and rural areas, alongside seasonal visitor spikes in tourist-heavy National Parks and coastal destinations.
- **Rural Economic & Agri-Tech Applications:** Practical evidence demonstrating how advanced mobile connectivity underpins sustainable agriculture, including automated drone surveying, livestock tagging, smart soil monitoring, environmental compliance logging, and supply chain tracking.
- **Public Service Delivery & Healthcare:** Data illustrating the reliance of remote patient diagnostics, digital health monitoring, and social care platforms on reliable mobile coverage, particularly in mitigating rural health inequalities.
- **Emergency Services Network (ESN):** Operational mapping ensuring critical emergency and first-responder communications have continuous, uninterrupted macro-coverage along all strategic transport routes and within isolated rural valleys.

Additional Consultation Questions

Part A

Statement of Public Participation

Q1: To what extent do you agree the proposed timetable provides sufficient opportunity for meaningful engagement and evidence gathering?

Agree

Q2: Are there any other stages in the process where additional public engagement or consultation would be beneficial, in addition to those being provided for Options, and draft National Development Framework? If so, please explain why?

Engagement with key infrastructure providers and telecommunications operators should be integrated at the earliest stages of drafting options. Early dialogue ensures that spatial options are realistically aligned with technical and commercial infrastructure deployment constraints, preventing undeliverable draft policies.

Q3: Are there particular stakeholder groups who may require additional support or tailored engagement?

Infrastructure providers, utility companies, and mobile network operators require tailored technical workshops. Given their unique role in delivering the digital backbone of Wales, standard consumer-focused engagement is insufficient to resolve complex technical and policy alignment challenges.

Direct engagement with the telecoms industry through the Mobile Network Operators and fixed line companies will provide a greater understanding of investment, pressures on the industry and issues arising from the overall rollout and replacement programmes being undertaken.

Q4: Are there communities or groups whose views are underrepresented in planning processes and who should receive particular attention during the revision of the National Development Framework?

Rural and valley communities that currently experience digital exclusion are often underrepresented. Their voices are crucial to understanding the social and economic impact of poor connectivity. Special efforts must be made to engage them, using both digital and non-digital means.

Q5: A) To what extent do you agree with the engagement methods highlighted?

Agree

B) Are there any additional methods or approaches that should be considered?

Additional approaches should include targeted industry roundtable sessions with the Mobile Infrastructure Forum (MIF) and Mobile UK. These technical roundtables will help align draft NDF policies with the practical realities of mobile infrastructure deployment in Wales.

Q6: Is there anything else you would like to tell us about the draft Statement of Public Participation?

The SPP should explicitly recognise that infrastructure delivery partners are key participants in the revision process. Aligning timescales with industry investment cycles will support realistic evidence-gathering.

National Conversation Engagement Plan

Q7: Do the proposed themes (see 4.1 of the National Conversation Engagement Plan) cover the most important issues for Wales's future?

Yes

If no, what is missing?

The Mobile Infrastructure Forum (MIF) and Mobile UK agree that the proposed themes address the principal long-term issues for Wales. However, the future National Development Framework (NDF) must explicitly recognise digital/telecommunications infrastructure as Critical National Infrastructure (CNI) and a key cross-cutting enabler of economic growth, public services, and community resilience. Treating mobile connectivity as an essential utility (alongside transport, energy, and water) is vital, especially given Wales's challenging topography and rural dispersion. Access to digital opportunity should not be constrained by geography.

Q8: Are there any places, communities or issues that should receive special attention during the national conversation?

Special attention must be paid to topographically challenging rural areas, deep valley communities, strategic transport corridors (road and rail), and tourist hotspots in National Parks and National Landscapes. These areas suffer most from coverage and capacity gaps due to physical and designation constraints.

Additionally, engagement with the Emergency Services, Adult Social Care services and health care services to understand the importance of connectivity and how improvements in network coverage and 5G deployment can assist in deliver of these key services.

Q9: How can we make sure that everyone in Wales has a chance to take part?

Hybrid engagement methods must be utilised. While digital platforms are highly efficient, physical workshops and local events are essential in areas of Wales that currently suffer from poor digital connectivity to avoid further excluding these communities.

Q10: What is the best way to engage with you?

Online survey

Q11: Are there any additional comments you wish to make on the draft National Conversation Engagement Plan?

The plan must explicitly position digital connectivity and mobile infrastructure as core themes of the national conversation, as they underpin all seven goals of the Well-being of Future Generations (Wales) Act 2015.

Part B

Wales in 2050

Q12: What would you like Wales to be known for in 2050? How can planning, development and infrastructure help make this happen?

By 2050, Wales should be known as a digitally advanced, prosperous, and socially inclusive nation. To achieve this, the NDF must embed an 'Infrastructure First' planning approach. Telecommunications should be planned proactively alongside housing, transport, and employment growth, rather than retrofitted. The NDF must promote a balanced approach that enables proportionate deployment of essential mobile infrastructure in Wales's sensitive landscapes (National Parks and National Landscapes) to prevent digital exclusion in rural and tourist-heavy areas.

Q13: What should we pass on to future generations in terms of our communities, environment (land, sea and air) and infrastructure?

Future generations should inherit well-connected, resilient communities, a protected natural environment, and future-proof infrastructure. We must pass on robust mobile networks capable of supporting 5G Standalone, smart energy grids, and digital healthcare. To ensure rural Welsh communities and visitor economies are not left behind, planning policy must balance landscape protection with the necessary deployment of modern communications infrastructure.

Q14: Looking ahead to 2050, what are the biggest challenges and opportunities facing Wales, and how should they influence future development?

Challenges:

- Topographical constraints (mountainous terrain and valleys)
- extensive environmental designations, and
- climate-related risks like flooding.

Opportunities:

- The digital economy
- smart agriculture
- digital public services, and
- green technologies.

Planning Response:

The NDF should adopt an Infrastructure First approach, designating digital networks as CNI. This ensures that infrastructure planning is integrated early, supporting climate resilience (emergency communications) and equitable economic growth across all Welsh regions.

High-quality digital connectivity is already essential to economic growth, effective public services and social inclusion. The adoption of AI and other data-intensive technologies further strengthens the case for investment in the coverage, capacity, reliability and resilience of fixed and mobile networks. Without a planning framework that supports the timely deployment and upgrading of this infrastructure, Wales risks constraining productivity and innovation and leaving communities and businesses unable to benefit fully from technological change by 2050.

The National Development Framework should therefore plan for future connectivity needs, rather than simply today's requirements. This means supporting the modernisation of existing networks as well as new infrastructure, and ensuring that digital connectivity is considered alongside housing, employment, transport and energy at the earliest stages of development planning.

Increasing dependence on digital services also reinforces the importance of resilience. Telecommunications networks rely on power supplies and transmission links, both of which can be affected by severe weather and climate-related risks. The NDF should recognise these interdependencies and support coordinated planning between telecommunications providers, energy networks and public authorities across both existing infrastructure and new development. Planning policy should facilitate proportionate network improvements, while any additional resilience requirements should be based on a clear assessment of risk, cost and deliverability, with appropriate public funding where the wider societal benefits cannot be delivered through commercial investment alone.

Prosperous Wales

Economy and Jobs

Q15: Which parts of Wales should be prioritised for jobs, investment and economic growth, and why?

No Comment.

Q16: How can planning and infrastructure help create opportunities for people and businesses across all parts of Wales?

Planning and infrastructure can unlock opportunities across Wales by establishing an 'Infrastructure First' framework that embeds digital connectivity at the site allocation and master-planning stages. Given Wales's challenging topography, achieving equivalent mobile coverage requires greater infrastructure density, supportive local policies, and modernized, simplified planning rules.

High-quality mobile connectivity is essential to reducing rural isolation and addressing geographic and economic inequalities. Crucially, it provides the foundation for demographic sustainability: expanding digital opportunities allows rural communities to attract and retain younger generations through remote work and enterprise, while providing the essential digital health and community services required to support an ageing population.

Wales must view itself as a nation where opportunity is never constrained by connectivity. By providing a planning framework that actively enables mobile network deployment and upgrades, the National Development Framework can ensure that digital connectivity serves as the catalyst for widespread, resilient economic growth across every community.

Q17: Which industries do you think will be most important to Wales by 2050, and what land, natural resources or infrastructure will they need?

Key industries by 2050—including advanced manufacturing, precision agriculture, tourism, renewable energy, and life sciences—will be highly data-driven. Every sector will require high-capacity, low-latency mobile networks (such as 5G Standalone and edge computing). The NDF must support the evolution of telecommunications sites into multi-functional hubs and streamline development processes to keep pace with rapid technological advancement.

Energy

Q18: How can renewable and low-carbon energy projects bring the greatest benefits to local communities and the Welsh economy?

No Comment.

Q19: What should be considered when deciding where renewable and low-carbon energy projects are located?

No Comment.

Q20: What opportunities are there to reduce energy use and meet more of our energy needs locally?

With an increase in connectivity the work life balance can change so that less journeys and travel are required. This will be a direct benefit to furthering a low carbon future and reducing energy needs and reliance on fossil fuels.

Net Zero and the Circular Economy

Q21: What changes to the way we plan and develop places are needed to support Wales's transition to net zero, a circular economy, nature recovery and wider environmental sustainability?

Transitioning to net zero requires spatial planning to prioritise digital solutions that fundamentally eliminate carbon-intensive travel and optimise land use.

The widespread deployment of 5G Standalone (5G SA) and full-fibre digital infrastructure lessens pressure on strategic road networks, minimises physical land-take for new transport corridors, and delivers high-capacity connectivity directly to where people live and work. Crucially, advanced digital connectivity transforms public service delivery: adult social care and community health services can monitor and support vulnerable or at-risk individuals safely in their own homes. This not only maintains independent community living but also dramatically cuts the need for routine vehicular travel by healthcare and care professionals across extensive rural areas, significantly reducing transport emissions.

In addition, advanced mobile connectivity is an essential enabler of smart energy grids, decentralized renewable generation, and real-time environmental monitoring. To achieve these twin environmental and connectivity goals, the revised NDF must designate telecommunications as Critical National Infrastructure (CNI) and provide positive, proportionate policy support for network deployment that accelerates Wales's low-carbon transition.

Q22: How can these changes support a just transition which addresses inequality, creates opportunities and is fair to people and communities across Wales?

With improved connectivity opportunity to combat youth unemployment and to encourage greater investment into Wales will follow. With assistance from local communities, local councils, the LPAs and industry benefits can be bought to the built environment and urban areas within Wales providing future employment benefits and sustain the viability of more rural communities.

Resilient Wales

Community Resilience and Climate Change

Q23: What are the biggest climate and environmental risks facing different parts of Wales, including flooding, storms, heatwaves, coastal change, water pressures, pollution and impacts on infrastructure, services and natural resources, and how should planning respond?

Wales faces severe climate risks, including flooding and intense storms that threaten critical utilities. To respond, the planning system must build infrastructure resilience. Resilient mobile networks are crucial as they support emergency communications, disaster response, and real-time environmental monitoring. The NDF must treat telecommunications as CNI, enabling necessary upgrades and network enhancements in topographically challenging and designated areas.

The NDF must address utility interdependencies, particularly the lack of power resilience in the national grid during outages, which significantly strains telecommunications networks. It is not feasible or commercially viable for mobile network operators and infrastructure providers to fund and build a duplicate power network to compensate for grid failings. The NDF must coordinate the wider energy strategy to ensure adequate power resilience is in place to protect digital connectivity during climate-driven outages.

Nature and Land

Q24: How can planning help nature and natural systems adapt to climate change so they continue to support wellbeing, ecosystem resilience and essential services for people and communities?

Planning should support nature-based solutions, and digital infrastructure is a critical enabler of this. Reliable mobile connectivity supports real-time environmental monitoring, flood warning systems, and smart land management. The NDF should promote a balanced approach where environmental protection and essential digital infrastructure are planned together.

Q25: How should land-use planning protect and enhance nature while also supporting housing, renewable energy, food production, timber, economic development, circula economy opportunities, flood resilience and community wellbeing?

Land-use planning must balance environmental protection with essential utility delivery. Sector activities (like smart farming, forestry, and tourism) increasingly depend on robust mobile networks. The NDF should recognise that environmental conservation and digital connectivity are not mutually exclusive and should support proportionate telecommunications deployment in designated landscapes to sustain rural livelihoods.

Q26: How can the planning system help ensure that important landscapes, habitats, coastal and marine areas, and natural resources are protected, restored and effectively managed for biodiversity, climate resilience and future generations?

No Comment.

Sea and Coast

Q27: What do you value most about the sea, and what should it provide for future generations? What does this mean for how we use and manage land and coastal areas?

No Comment.

Healthier Wales

Health and Wellbeing

Q28: How can planning and development help create healthier places and improve people's wellbeing?

Healthy places depend on physical and digital connectivity. Digital connectivity supports health and wellbeing by enabling remote clinical consultations, digital health monitoring, and social inclusion. The NDF should adopt an Infrastructure First approach to ensure that mobile networks are deployed alongside housing, healthcare, and education from day one.

Q29: What services, facilities, infrastructure and environmental features are most important for people's health and wellbeing?

While traditional services (healthcare, education, green spaces) are vital, robust digital connectivity is now an essential determinant of health and wellbeing. As public services digitise, digital inclusion prevents isolation. The NDF must treat mobile connectivity as an essential utility to ensure equitable access to health and community services.

Q30: Are there any places or communities that need extra support to improve health, wellbeing or economic opportunities?

No Comment.

More Equal

Q31: How can planning make it easier for people to access jobs, healthcare, education, shops, services and community facilities?

Access to jobs, education, and healthcare is increasingly digital. The NDF should coordinate physical transport planning with digital connectivity. By treating telecommunications as essential infrastructure alongside transport, planning can ensure that rural and remote communities can access key services online, bypassing physical and geographic barriers.

Q32: How important is good digital connectivity, such as broadband and mobile coverage, for the future of communities and businesses? Where should investment be focused?

Critical Importance

High-quality mobile and broadband connectivity is as essential to daily life and business as electricity and water. It is recognised as Critical National Infrastructure by the UK Government, and the NDF should do the same for Wales.

Investment Focus

Prioritise rural and coastal communities, strategic transport corridors (road/rail), and areas of challenging topography. Because market-led delivery can be challenging in remote Welsh terrains, planning policy must support joint public-private initiatives and afford substantial positive weight to telecommunications deployment.

Cohesive Communities

Homes and Housing

Q33: What makes a good place to live, and how can planning help create and support these communities?

A good place to live must be both physically and digitally connected. Access to high-quality mobile networks enables flexible working, prevents rural isolation, and supports local public services. The NDF should promote an Infrastructure First approach, ensuring that telecommunications requirements are integrated during the earliest stage of master planning for housing and employment developments.

Q34: What kinds of homes will Wales need over the next 25 years, and where should they be built?

No Comment.

Regeneration and Development

Q35: How should towns, cities, villages and rural communities change and grow to meet future needs?

No Comment.

Transport and Logistics

Q36: How should people and goods travel around Wales in 2050, and what transport and infrastructure will be needed?

By 2050, transport in Wales will be highly digitalised, relying on real-time data, connected/autonomous vehicles, and smart logistics. Continuous mobile coverage along strategic road and rail corridors is essential for safety, efficiency, and passenger productivity. The NDF must align

transport and telecommunications planning, facilitating infrastructure deployment along corridors that traverse topographically challenging and designated areas.

Vibrant Culture and thriving Welsh language

Q37: How can planning and new development help support and strengthen the Welsh language?

No Comment.

Q38: How should local history, culture and identity be reflected in decisions about new development?

No Comment.

Q39: How can different parts of Wales contribute to a shared vision for the country while keeping their own unique character and identity?

No Comment.