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AGENDA

Committee	ECONOMY & CULTURE SCRUTINY COMMITTEE
Date and Time of Meeting	TUESDAY, 9 APRIL 2019, 4.30 PM
Venue	COMMITTEE ROOM 4 - COUNTY HALL
Membership	Councillor Howells (Chair) Councillors Henshaw, Gordon, Gavin Hill-John, Parkhill, Robson, Sattar and Stubbs

Time approx.

1 **Apologies for Absence**

To receive apologies for absence.

2 **Declarations of Interest**

To be made at the start of the agenda item in question, in accordance with the Members' Code of Conduct.

3 **Minutes** (*Pages 3 - 18*)

To approve as a correct record the minutes of the previous meeting held on 19 February 2019 and to note the minutes of the Joint Scrutiny Committee held on 19 November 2018.

4 **Draft Economic Strategy; Economic Development White Paper** 4.30 pm (*Pages 19 - 168*)

To carry out pre-decision scrutiny of the report to Cabinet on the Draft Economic Strategy: Economic Development White Paper, prior to its consideration by Cabinet 11 April 2019.

5 **Informing a Music Strategy for Cardiff Report: Music Ecosystem Study & Strategic Recommendations** (*Pages 169 - 172*) 5.15 pm

To receive a presentation on the above Sound Diplomacy report, which will inform the Music Strategy, followed by Q&A.

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|----------|--|---------|
| 6 | Committee Business (<i>Pages 173 - 182</i>) | 5.45 pm |
| 7 | Way Forward | 6.00 pm |
| 8 | Urgent Items (if any) | |
| 9 | Date of next meeting | |
- 9 May 2019 at 4.30pm.

Davina Fiore

Director Governance & Legal Services

Date: Wednesday, 3 April 2019

Contact: Andrea Redmond, 02920 872434, a.redmond@cardiff.gov.uk

ECONOMY & CULTURE SCRUTINY COMMITTEE

19 FEBRUARY 2019

Present: Councillor Howells(Chairperson)
Councillors Henshaw, Gordon, Gavin Hill-John, Parkhill, Robson
and Sattar

57 : APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors Simmons and Stubbs.

58 : DECLARATIONS OF INTEREST

None received.

59 : MINUTES

The minutes of the meeting held on 17 January 2019 were agreed as a correct record and signed by the Chairperson.

60 : 'EVENTS IN CARDIFF' INQUIRY REPORT

The Chairperson advised Members that this item enabled them to consider the draft Events in Cardiff Inquiry report. The task group had consisted of Cllr Gordon, Cllr Henshaw and Cllr Parkhill.

The Chairperson invited comments from Members.

Members thought it was a very interesting and topical inquiry, noting the Tourist Tax Levy in Edinburgh and stressed that they considered that this would not be appropriate at this time for Cardiff, which was stated clearly in the report.

Members referred to Recommendation 8 and considered that the cost to register with the International I Congress and Conventions Association for conventions and associated events, would be worth it if it provided the opportunity of links with other cities.

Members discussed the Triathlon and considered that the £8000 for the TV rights to the event would be a wise investment to have a wide International TV audience for Cardiff.

Members congratulated the work of the Task and Group for the report and welcomed the suggestion of a signature event to offset the high impact/short duration events.

Members welcomed investment in infrastructure solutions.

Members found the key findings in relation to hotel bed capacity and budget hotels particularly interesting.

RESOLVED: to endorse the report for submission to the Cabinet

61 : DRAFT CORPORATE PLAN 2019-2022 AND DRAFT BUDGETARY PROPOSALS 2019/20

The Chairperson advised that this item provided Members with an opportunity to consider those items in the draft Corporate Plan and draft Budgetary Proposals that fall within the responsibility of the Committee. Cabinet would consider these on Thursday 21st February, prior to Council on 28th February.

The cover report was structured by Cabinet Member portfolio and Members would be referred to the relevant paragraphs of the cover report throughout proceedings. Members would firstly receive a briefing on the Corporate Overview of the draft budget proposals. The budget proposals and relevant parts of the Corporate Plan would then be considered by Cabinet Member portfolio.

Corporate Overview

The Chairperson welcomed Cllr Chris Weaver, Cabinet Member – Finance, Modernisation & Performance, Christine Salter, Corporate Director Resources and Ian Allwood – Head of Finance to the meeting.

The Chairperson invited the Cabinet Member to make a statement in which he said that there was a budget gap of £32.4 million, which would be closed by a Council Tax rise of 4.9% and £19 million of directorate savings, most of which were the proposals that went to consultation in the Autumn. He was happy to say that the Financial Resilience Model was being taken forward almost in full apart from £200k and that the budget had been proposed with consideration being given to Capital Ambition, relevant legislation and the Future Generations and Wellbeing Act. It was stressed however that over the past decade the Council has had to find £200 million of savings and a further £105 million would need to be found over the next 4 years.

Members were provided with a presentation on the Cabinet Budget Proposal by Christine Salter after which, the Chairperson invited questions and comments from Members.

Members asked in relation to the Council Tax rise of 4.9%, if this needed to be revisited going forward. The Cabinet Member advised that the Council revisits this twice yearly, once when Budget Strategy goes to Council in July and again when it's a Budget Proposal to Council in February, the proposal is also included in the consultation. The Cabinet Member added that it is an illustrative figure and it was difficult to say what the actual figure would be over the coming years, it's an assumption that the Council has the opportunity to discuss on a number of occasions throughout the year.

Members referred to the rent increase for Council tenants and asked how this works in relation to paying out Housing benefit. The Cabinet Member explained that benefits are paid by Central Government, the element that relates to the Council is the Council Tax Reduction Scheme and this is taken into account and budgeted for.

Members asked if the LDP being behind target this year would have an impact on the budget. Officers explained that an exercise is carried out each year and the Council Tax base looks to March 2020, currently there aren't many LDP homes contained in this budget so there is very little impact. Annex 2 to the report looks at how the LDP

will be taken into account going forward including additional services required to service the new homes and the expenditure from Council Tax.

Members noted the 1000 new homes being built and that part of the funding is for the next tranche of new homes and asked what the breakdown cost per unit for each home was. Officers advised that the Corporate Plan states 1000 new homes by 2020 and a further 1000 new homes over the next 5 years, Housing would have the scale of charges for unit.

Members noted that there were £3.5 million of savings in the general planning stage which was higher than last year and asked how confident officers are that these can be realised, especially as currently at Month 9, not all of last year's savings were yet realised. Officers explained that they were increasingly confident, this year the large Social Services savings are supported by detailed plans and that hasn't been the case in previous years, which gives confidence. Work would continue with Directors to firm up plans and these would be monitored and reviewed along the way.

Members referred to the reduction in grants to major events, asking if this was cumulative and officers advised that it was.

Members asked about the consultation and how confident the Cabinet Member and Officers were that it was a representative sample, bearing in mind the very low youth response rate and asked how they had addressed the low response rate in the Southern Arc of the City. The Cabinet Member agreed that the youth response was disappointing and was not what they had hoped for, they would look at how this could be done differently and improved and share this with scrutiny. Overall efforts had been made to improve response rates, such as targeting low response areas with door to door consultation; this combined with Ask Cardiff gives some confidence that they are getting a good sense of the City's views; the response albeit quite low is actually good compared to other Local Authorities, however the responses do still tilt towards the North of the City and the more affluent residents.

Economic Development Directorate

The Chairperson welcomed the Leader, Councillor Huw Thomas, Ken Poole – Head of Economic Development and Jon Day – Operational Manager – Economic Policy to the meeting, noting Councillor Russell Goodway, Cabinet Member – Investment and Development, and Neil Hanratty, Director of Economic Development, had both sent apologies.

Leaders Portfolio and Investment & Development Portfolio

The Chairperson invited questions and comments from Members.

Members were pleased to see included in the Corporate Plan the City wide Performance Indicators against core cities, especially GVA per person and were also pleased to see Cardiff do well on the Graph on Employment Growth – City Performance. Members noted that Manchester had improved greatly in this area and asked if lessons could be learned. The Leader and Ken Poole explained that they have engaged with Manchester as the most successful city at attracting investment in the UK and Western Europe. They have secured a significant amount of City Deal funding to fund employment generating projects; they have also benefitted from an integrated approach to marketing the City, with all local authorities working as one

City over the last 15 years; this high profile allows them to reap the development of their efforts with long term commitment to generating investment.

Members were disappointed that there was no mention of a plan for Heritage buildings in the Corporate Plan, and whilst they understood that the Corporate Plan doesn't capture everything, they considered that this should be noted within the Plan, as it was last year.

Members referred to the decreasing budget for City Wide events and asked how this fits with the Cabinet's aspiration to increase City Wide events. The Leader explained that the tradition of continuing to fund ongoing events needs to taper off, funding would continue for those in the build-up stage and going forward the aim was to kick off new events with a view to them becoming self-sustaining.

Members asked for information on the key performance measures and were advised that they are job numbers, it is an annual target and that target has been doubled. Members referred to productivity lags compared to competitor cities and asked what action is being taken to address this. Officers explained that this was an analysis that was done with reference to sectoral productivity compared to core cities and that Cardiff had slightly underperformed. A response had been referenced in the draft Economic Strategy; there would be a focus on sector strengths such as the Creative Industries and Life Sciences; investment was needed to coalesce with the schools and universities; transport also impacts on this and the Metro will help. The Leader added that it was also important to take a Welsh view and a City view; Cardiff does well compared to Wales, less so with some core cities; it was important to target areas where Cardiff has strengths and potential for high value growth.

Members referred to the key role played by the Events team as noted in the current task and finish inquiry report and asked about the impact of deleting a post in this team in the savings proposals. The Leader agreed that the Events team do exceptional work for the City and that Cardiff 'punches above its weight' in this area. He considered however that there was in-house capacity and that the saving could be achieved whilst still delivering what was needed in a more efficient structure. Members referred to the deletion of a vacant post in Economic Development and asked what impact this would have on service delivery overall and if there was a missed opportunity to fill this post and bring in some expertise. Officers explained that they are always looking at ways to improve the service with more efficiency through working with Welsh Government and partners; they didn't consider that the deletion of this post would impact on performance, they would work smarter and in partnership with others.

Members noted the challenges of aligning the Corporate Plan with the budget and gave examples such as wishing to increase the visitor economy but reducing the tourism budget and improving the safety of the City but reducing the city management team budget by £40k; and asked how this can be achieved and if there was confidence that the Council could still deliver Corporate Plan ambitions and meet budgetary pressures. The Leader agreed that it would be a challenge, but service areas would be challenged to work more efficiently; there would be more partnership working with organisations such as Visit Wales, Cardiff Hoteliers Association and partnering with the ICCW so that Cardiff benefits; it was about working smarter across boundaries.

Members noted that there was reduction of £28k from the Economic Development Initiatives budget which would have been used for attracting new businesses, events etc. and asked how this will now be addressed. Officers explained that the Business Improvement District (BID) in the City would work effectively here to leverage additional resources from the private sector for this.

Members asked for more information on the Cardiff Canal Quarter and were advised that this was the area South of Queen Street – Guildford Crescent and Churchill Way; a report on this would be brought to a future scrutiny meeting.

Culture & Leisure Portfolio

The Chairperson welcomed Cllr Peter Bradbury, Cabinet Member – Culture & Leisure, Kathryn Richards – Head of Culture, Venues, Tourism & Events and Jon Maidment – Operational Manager – Parks, Sports, Leisure & Harbour Authority to the meeting.

The Chairperson invited the Cabinet Member to make a statement in which he said that although this was a difficult budget it was not as challenging as previous years had been for this directorate. He explained that the majority of savings would come from staff rationalisation such as voluntary redundancies and also from reducing subsidies to events. Other savings included £1.8 million from the GLL partnership deal, £6k from the closure of toilets in Caedelyn Park and from the transfer of buildings in certain parks where there had been interest in them. The Cabinet Member added that there would be more information on the New Theatre being brought to a future meeting soon.

The Chairperson invited questions and comments from Members.

Members referred to the review of funding arrangements for the Cardiff Harbour Authority and asked who was conducting the review and when the findings would be published. Officers advised that the review is being conducted by consultants employed by Welsh Government, called Local Partnership and would conclude at the end of March 2019.

Members referred to correspondence that Scrutiny Committee Members had received from Artes Mundi and to the reduction in the grant to the organisation. The Cabinet Member stated that the proposal was for a 50% reduction in the grant funding; this possibility had been communicated with the organisation for the past 3 years and unfortunately this year the Council is not in a position to continue funding at the current level. The Cabinet Member did not consider that it would affect the festival and the Council would help them with commercial opportunities and grant applications.

Members made reference to the closure of the toilets in Caedelyn Park and wondered about the timing of this and the current Public Toilet Strategy Consultation.

Officers explained that the toilets had been closed last year due to the state of repair as there was no other option.

Members noted the Corporate Plan references the increased role of Volunteers and Friends Groups in Parks but noted that there was no consideration for the increase of Park Rangers in the budget to support this. The Cabinet Member explained that they would always want more Park Rangers but at the moment the Council was not in a position to support that; Officers were confident that the target of 18,000 hours could be met as there was no reduction in the 2019/20 budget so that figure could be achieved. The Cabinet Member also stressed that there had been no increase in park fees for local sporting clubs etc.

Members noted that with reference to the New Theatre, the savings were at the general planning stage and asked if Officers were confident they could be made. Officers explained that they were fairly confident, they were moving quickly with things, the advert had gone out and there had been lots of interest; there was a new manager at the Theatre with commercial background and experience; they were trying to move the lease on quickly but also increase revenue at the present time. The Cabinet Member added that there had been a directive to move fast on this but that there should be oversight; it would need Scrutiny and Cabinet oversight too and there were legal parameters to work to, that is why it is listed as at general planning stage currently.

Members referred to the £54k in the Financial Resilience Mechanism budget for 'other' and were pleased to see this was being earmarked for playground maintenance and trees. Members asked if this would be for tree planting or maintenance; Officers stated that the detail of this had not yet been discussed with the Cabinet Member; the amount would need to be split between the playgrounds and trees but that the money would be spent; there was a rolling programme of playground maintenance and they were aware that there were improvements needed across the City.

Members noted that with regards to events, the Triathlon considered Cardiff to be excellent and that the water quality in Cardiff Bay was considered fantastic. Members asked if there had been any discussion with the Harbour Authority about open swimming and an artificial beach on the edge of the Bay. The Cabinet Member explained that there had been discussions at a local level, but this would need further work and be thoroughly tested; Officers explained that there were some technical difficulties as the water quality is not consistently great so cannot be guaranteed for events but there are opportunities to be explored. He added that there is a roped-off area for open water swimming at the White Water Centre in the Bay. The Cabinet Member added that he had met with the Triathlon recently and they are keen to hold the World Series event in Cardiff, this would need Welsh Government backing to be possible.

Communities & Housing Directorate

The Deputy Leader, Councillor Sarah Merry, Cllr Lynda Thorne, Cabinet Member – Housing & Communities and Jane Thomas (Assistant Director – Communities & Housing)

Education, Employment & Skills Portfolio

The Chairperson invited the Cabinet Member to make a statement in which she explained that Learning for Work was funded by Welsh Government Grant - this funding was anticipated to be reduced by 50% from September 2020, there would be a full service review which would be subject to a future report to scrutiny; Learning for Life was based on a cost recovery model which was making good progress; Llanover Hall would be self-financing by the end of the year and would also be celebrating its 50th year as a community arts centre soon.

The Chairperson invited questions and comments from Members.

Members noted that they had previously asked the service to explore options with regard to volunteers and subsidised courses and asked for an update on this.

Officers explained that volunteers are used on courses and in Hubs for things such as Digital Inclusion and this was funded through Adult Community Learning; it was hoped that there would be some subsidised courses offered at Llanover Hall soon, via cross-subsidisation from other courses.

Members asked if the Grassroots project fell under Youth Services or Adult Learning for Life. Officers advised that it fell under the Hubs project but there is a Youth Service based there; Officers further advised that there were plans to make this a one stop shop for young people providing a huge range of services; there were plans in the planning process for an extension at the back of the building and there was a funding bid in to support council funding currently.

Housing & Communities Portfolio

The Chairperson invited the Cabinet Member to make a statement in which she said that the directorate had already achieved the £250,000 savings through a restructure which was good news. The service would continue to be improved through a roll out of the Community Wellbeing Hubs.

The Chairperson invited questions and comments from Members.

Members were keen to learn more about the details of the changes in terms of the Hubs strategy, what end results were wanted and what services would be offered in each Hub. Officers advised that there has been a review of staff levels across the libraries and training such as digital, general hub training and how to refer to services such as Independent Living Services, meals on wheels and support services has been provided. Each library would offer services that the community needs, these

would be identified through consultation; if any building modification was needed to meet these identified needs then funding bids would be put in for these. This has happened in Whitchurch and Rhydpennau and these consultations have led to changes in proposed plans; other consultations are due to happen in other parts of north Cardiff over the next few months.

Members asked for more information on line 33 with reference to Into Work Services and management costs. Officers advised that they have brought all grant funded services in-house, this means that when they get grants and the associated management costs these can then be offset.

RESOLVED: that the views of the Committee would be discussed during the way forward section of the meeting and a letter sent to the Cabinet Member in due course.

62 : URGENT ITEMS (IF ANY)

None received.

63 : WAY FORWARD

Members discussed the information received and identified a number of issues which the Chairman agreed would be included in the letters that would be sent, on behalf of the Committee, to the relevant Cabinet Members and Officers.

64 : DATE OF NEXT MEETING

14th March 2019 at 4.30pm, Committee Room 4, County Hall, Cardiff.

The meeting terminated at 6.35 pm

JOINT SCRUTINY COMMITTEE

19 NOVEMBER 2018

Present: Councillor (Chairperson)
Councillors Gordon, Henshaw, Gavin Hill-John, Philippa Hill-John, Howells, Owen Jones, Lancaster, Owen, Parkhill, Jackie Parry, Patel, Robson, Sattar, Simmons, Stubbs, Wong and Wood

5 : CHAIRPERSON

Councillor Ramesh Patel was appointed as Chairperson of the Joint Scrutiny Committee.

6 : APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Bob Derbyshire.

7 : DECLARATIONS OF INTEREST

None received.

8 : PUBLIC SPACE PROTECTION ORDERS - CONTROL OF DOGS

The Chairperson welcomed Councillor Peter Bradbury, Cabinet Member for Leisure & Culture, Councillor Michael Michael, Cabinet Member for Clean Streets, Recycling & Environment, Matt Wakelam, Assistant Director - Street Scene in Planning, Transport & Environment, Infrastructure & Operations and Jon Maidment Operational Manager, Parks Sport & Harbour to the meeting.

Members were advised that they would have an opportunity to question the Cabinet Members and officer from the Planning, Transport & Environment Directorate; the Chair would invite oral statements from Councillors, members of the public and other stakeholders attending the meeting; Members would have an opportunity to question the Councillors, members of the public and other stakeholders attending the meeting; and Members would consider any written statements presented by Councillors, members of the public and other stakeholders to the meeting.

The Chairperson invited Councillor Peter Bradbury to make a statement in which he said that he wished to thank the Committees and officers for arranging the meeting. He stressed that no decision would be made today, but it was an opportunity to look at the results of the consultation, hear a presentation from officers, and look at responses to the survey and social media activity. He stated that there was a clear consensus of no support for one particular element of the PSPO; the general consensus ruled out a blanket ban on dogs on marked pitches; adding that this remains an issue but the support of the wider community is needed and the Council recognises that. He added that there would be a further opportunity for pre-decision when the PSPO goes to Cabinet. He explained that there was widespread support for some elements of the consultation which was the most widely consulted upon

topic other than budgets and had received record responses and social media activity; and he wished to thank officers for their support during what was a particularly difficult time for him and his family.

The Chairperson invited Councillor Michael to make a statement in which he thanked the Committees for the meeting. He stated that there were issues with sports pitches and the intention of the consultation was to come up with ways of making things better; he was happy to listen to evidence and would reflect on it and come back with something that would be a benefit to everyone.

Members were provided with a presentation on the PSPO consultation after which the Chairperson invited questions and comments from Members.

Members expressed disappointment that Members of the public were not able to ask questions at the meeting.

Members referred to the front cover of the consultation document and asked if it was genuine. The Cabinet Member for Leisure & Culture acceded that the choice of cover was a mistake and that he has apologised for it and would like to apologise again as it was his responsibility.

Members noted that there had been notices displayed in three sports clubs and asked if any had been provided to vets etc. Members were advised that Appendix C to the report listed the people who were contacted; vets were not but there were lots of others that were.

With reference to the written statements, Members noted that there was a raft of information that had not appeared in the consultation document as asked what information was looked at before the consultation was sent out and whether any of the ideas had been considered. The Cabinet Member for Clean Streets, Recycling & Environment stated that the consultation was for the people of the City, all of their views would be taken on board before any decision is made. He added that things can always be done better in hindsight but they went shutting the door on anything, they would consider all views, look at costs and then determine a way forward. The Cabinet Member for Leisure & Culture added that was why there had been an email address established for the consultation and a comments section for people to put ideas forward; he stated that this process would continue post consultation. He considered that the consultation had energised people who were previously under represented, and that lessons had been learned from the consultation; any ideas that would help would be considered and this was in relation to litter as well as dog fouling.

Members asked whether it was reasonable to alter any details of the consultation during the process with particularly reference to question 11 and asked if this could be legally challenged. Officers advised that they would take the question away. Officers added that the consultation was about obtaining a view, there were some queries during the process and some details needed clarity so there had been some minor modifications, but with regards to the legal position of this then a view would have to be sought from legal colleagues.

With reference to question 11, Members considered that there were 3 points that people were unable to answer 'no' to and that people found the question difficult to answer. Members asked how the question was extracted with regards to playgrounds and pitches. The Cabinet Member for Leisure & Culture stated that he takes responsibility and that he shouldn't have grouped the question in the way it was. He added however that the result was that they have a sound consensus on 5 out of 6 proposals. He stated that he has apologised for the image used on the front cover and not separating out question 11 but he defended what he considered a worthwhile exercise.

Members considered that it was not just a playground or sports pitch issue, and that in some wards in particular it was a real problem so residents were grateful for the consultation.

Members were interested in the raft of ideas that the consultation had thrown up and were keen to learn more about Green Dog Walking and See It Report It. The Cabinet Member for Leisure and Culture stated that the reporting mechanism does need to be ironed out more, currently 1 of 5 reports of dog fouling are in relation to parks; clubs often clean up themselves and don't report the issue. The Council was keen to promote dog walking as an activity for all.

Members noted that there are lessons to be learned from the consultation process and considered that people could have tested the survey before it was issued and any queries such as with question 11 would have been raised.

Members were concerned that there was confusion around dogs being able to use sports pitches and that some people were being aggressively challenged, stating that better communication on the current position was needed. The Cabinet Member for Leisure and Culture stated that when the final PSPO is suggested, it will make it very clear what is allowed and not allowed.

Members referred to the 500 complaints and asked for clarification on this. Members were advised that paragraph 15 of the report explains this but it was noted that the 500 complaints were not just park complaints it was the whole amount but there was reference to parks so the confusion could be seen.

Members asked for information on the number of fines issued relating to marked sports pitches. Officers advised that in 2015/16 there had been 49 fines issued, 11 of which were by Park Rangers; in 2016/17 - 28 fines were issued, 24 by Park Rangers; in 2017/18 - 19 fines were issued, 16 by Park Rangers. There were no figures for the current year as yet but they were not greatly enhanced. Officers noted that the figures were extremely low and were looking at ways of changing enforcement, including having the means to clear up dog fouling. It was noted that all bye-laws had to be brought up to date; there was a need to improve education and enforcement in Parks and target specific areas using intelligence from the public who generate the complaints.

Members sought clarification on what constitutes a marked sports pitch and were advised that it was a pitch that was marked and played on and that seasonality should not affect it.

Members discussed health concerns and noted that this related to urban foxes as well as dogs, and asked how this was being dealt with. The Cabinet Member for Leisure and Culture reiterated that the problem was not with the animals but with irresponsible dog owners, if there are specific problems in certain areas then people are encouraged to report it and the Council will clean it up.

Members noted that lots of good ideas had come forward from the consultation. Members recognised that there were resource, legal and training implications to be considered. Members noted that there are concerns regarding current aspects of park management such as Bins and emptying of bins and asked what the plans were to address these concerns. Officers stated that Cabinet had invested £120k for removing/adding bins around the City, the new larger bins would have sensors to show how full they are, this data could be accessed remotely, and they would be placed in key locations around the City. There was a need for better intelligence to apply resources to provide a better service, this was already happening and would be kept under review.

Members referred to the importance of semantics and clarity of questions when designing the consultation and asked what processes were looked at regarding formulating questions and whether the questions were tested before they went live, because as the Capital City, Cardiff should have the skills to do meaningful consultations. The Cabinet Member for Leisure and Culture explained that they had looked at other Local Authorities consultations, as well as Cardiff Research Centre; the Vale of Glamorgan had used very similar questions in their consultation too; processes had been looked at and the comments section and email address was added. With regards to semantics the Cabinet Member stated that this main concern was the result and what comes from it; there had been a number of concerns and these were listened to; people thought the consultation was skewed but it was not and their views were listened to, so in essence the consultation worked.

Members considered the dog walking community as a huge asset to the Council especially in terms of reporting and asked how this process could be used to keep this engagement with the dog walking community and hopefully increase reporting figures. The Cabinet Member for Leisure and Culture endorsed this view regarding the dog walking community and advised that he would meet with them again to move forward, this meeting would include sports clubs and friends groups to work together to make the parks better for everyone.

Members asked whether Cardiff was unique with marked sports pitches in a City environment and whether enforcement would be able to get the desired effect or whether a total ban was proportionate. The Cabinet Member explained that the consultation covered a wide range of proposals and reiterated that no decision was taken as yet. They had looked at what was legally possible with regards to marked pitches and also at legal cases in London boroughs; it was felt it was best to consult on a wider range of proposals as possible, listen to views to help define a PSPO.

Members discussed the difficulties with enforcement with regards to irresponsible owners particularly those who walk their dogs early in the morning or late at night. Members noted that the PSPO would be a deterrent and that better signage and communication may help to educate and deter.

Members referred to the written statements and noted that there were many ways that issues could be tackled, asking what recommendations would be taken forward to reduce dog fouling and whether a PSPO was presupposing the outcome of the consultation. The Cabinet Member for Clean Streets, Recycling & Environment stated that a PSPO would mean a change in legislation and provide a tool to assist Local Authorities and the Police to deal with anti-social behaviour; it has to be proportionate and to protect the City from dog fouling. The Cabinet Member for Leisure and Culture added that there are different bye-laws in different parks throughout the City, a PSPO allows for them all to be put under one making it easier to manage. Officers reiterated that education as well as enforcement was important and that there are awareness events held in Parks.

Members discussed dog waste bins and that often when these are not emptied, bags are left around the full bins. Officers advised that the teams are instructed to clean around the bins when they are emptied, it was also important to stress that dog waste can be placed in general waste bins. Members noted that there are 22 Officers who can enforce, they can also educate and clean; Officers were looking at ways of utilising resources including mobile scheduling.

Members asked for more information on whether there were copies of the consultation in libraries and Hubs and more a breakdown of how many responses were submitted online and how many in hard copies. The Cabinet Member for Leisure and Culture advised that there were posters and hard copies of the consultation in every library and Hub across the City with help available for completion. Officers didn't have the breakdown of how the responses were submitted but advised they could obtain this information if required. The Chairperson asked for confirmation to be provided that every library and Hub had hard copies of the consultation available; the Cabinet Member for Leisure and Culture advised that he would provide this and that the issue would come back for pre-decision too.

Members asked whether Cardiff had looked at other local Authorities and whether they enforce on people not carrying bags; Officers advised that they have and as part of the proposal they have looked at RCT for many aspects including consultation as they have reduced the number of complaints for dog fouling.

The Chairperson welcomed Councillors Driscoll and Dilwar Ali, Paul Smith, Penny Bowers, Jeremy Sparkes, Peter Jones and Nathan Foy to the meeting.

The Chairperson invited Councillor Driscoll to make a statement in which he expressed his thanks to Members and Officers for facilitating the meeting, providing himself and other stakeholders the opportunity to speak. He stated that he had played on most of the sports pitches in Cardiff, he supports the clubs and understands their concerns but he absolutely understands the concerns of dog owners too. He noted that most complaints received were about verges and pavements, but issues on pitches also needed to be addressed. He considered that the dog action group had been fantastic and it was imperative to work with them and others in addressing the issues. He added that education work was important and lessons could be learned from the work undertaken with Litter and also from the work of other local Authorities where best practice should be looked at. He concluded stating that he had many suggestions from residents including seasonal restrictions around splash pads in parks.

The Chairperson invited Councillor Dilwar Ali to make a statement in which he discussed Caring for K9's, explaining that this group was made up of Councillors and partners with the aim of improving the issue of dog fouling and improving welfare. The group gathers information from many areas and would hold a conference in the Spring and report to Cabinet. He noted issues such as dogs must be allowed to run, public space should be safe for everyone and owners with multiple dogs must be aware of all dog fouling. He stated that the group had received abuse on social media but reiterated that they were not dog haters, they were concerned for animal welfare and the PSPO should protect the public and allow people to exercise dogs responsibly.

The Chairperson invited Paul Smith to make a statement in which he said that he agreed with the majority of the consultation other than the marked sports pitch element; he was delighted to work with the Council and have the opportunity to take the message out to people in the wider dog ownership community. He added that Caerphilly County Borough Council have reviewed their PSPO and taken out the sports pitch element.

The Chairperson invited Penny Bowers to make a statement in which she said that responsible dog owners respect PSPO's that work; Cardiff Dog Action had informed people about the consultation and fought against the proposed sports pitch element with a reasoned argument and was willing to work with and move forward with the Council. She added that it was important to get the message to the minority of dog owners who are irresponsible through education and enforcement, engagement and a robust communication strategy. Members were advised of the Green Dog Walkers Scheme which had been successful and there were many dog owners keen to help both with sports clubs and to look at the issue more holistically.

The Chairperson invited Jeremy Sparkes to make a statement in which he explained that he was a dog owner who lives, works and plays sports in Cardiff. He noted the pride that was cited for a successful consultation however he considered that as 1 in 3 households are dog owners the response could have been much greater. He considered that the consultation could have been far greater reaching and that some people who were directly affected were excluded. He stated that information obtained through Freedom of Information requests had revealed that data provided to Cabinet was inaccurate and he stressed the importance of robust, reliable, reputable and relevant data. He considered that the risk of Toxicurias is low if you live in Cardiff yet there had been hostile comments made towards people.

The Chairperson invited Peter Jones to make a statement in which he said that he represented Guide Dogs Cymru; he considered that the proposals were disproportionate towards disabled people. He was pleased to see that an Equalities Impact Assessment had been undertaken but he considered that this should have been done before the consultation process started; he also added that signs in parks need to be accessible for people with disabilities, not only sight impairment.

The Chairperson invited Nathan Foy to make a statement in which he explained that he was a guide dog owner and he has a role to support people when they are met with challenges. He stressed the importance of exemption for guide dogs in any proposal that is brought forward as they are not the same as pet dogs. He was aware of guide dog owners who had met verbal resistance when free running their

dogs, he explained that many guide dog owners are older and are very intimidated when people are verbally abusive towards them. He stressed the importance of guide dogs having free running time, as an important part of what they do and accessible places are needed for them to do this. Large restrictions placed on guide dog owners would have huge impacts on them and their families as guide dogs enable family dynamics such as involvement in school activities.

The Chairperson thanked all witnesses for their statements and invited questions and comments from Members.

Members were concerned that there was a perception that decisions had already been taken and felt it was important for the Council to make the situation clear.

Members noted that there were 8 PSPO's in place across Wales and asked how they have worked where they were imposed on marked pitches. Members were advised that the PSPO's had all been implemented in the last 18 months, questions would be asked about the effect and also discussions held with dog owners to determine if there had been any changes on where/how they walk their dogs including how much time they now spend doing so.

Members asked for more information about people who had been excluded from the consultation and were advised that there were various groups who had not been contacted such as the PDSA, many vets and several registered boarders and kennels. Jeremy Sparkes added that he accepts there are budgetary issues but involving these groups would have gained quick wins. Penny Bowers stated that a lot of areas of Cardiff are like communities where everyone knows each other, they had contacted everyone they knew who had a dog, handed out leaflets and urged people to complete the consultation, expressing their views without preaching.

Members wished to congratulate Cardiff Dog Action Group stating that they had been remarkable in a number of ways including all the information that had been collected from various Council's. Members asked if there were any specific measures that they would consider the most beneficial to take forward. Penny Bowers stated that the Green Dog Walkers scheme stood out, it had captured people's imagination, anyone can get involved it is bright and colourful and attracts people. She added that no measure would work in isolation; she noted that people had mentioned bag dispensers but the group were not keen on polluting the parks with machinery; she noted that DNA was at the very early stages and was quite expensive so she would encourage people to participate in the Green Dog Walkers Scheme. Jeremy Sparkes stated that there were different issues in different parts of Cardiff, therefore it was important to use relevant data to inform effective enforcement. Paul Smith explained that Conway Council had a Youth Ambassador Scheme who worked out in the parks, stressing it was important to have the next generation on board with such schemes.

Councillor Driscoll concluded saying that the information from the Cardiff Dog Action Group had been fantastic. He added that it was important to use the best of what others are doing with regards to tackling dog fouling; and he stressed the importance of emptying bins and surrounding areas.

The Chairperson thanked everyone for their attendance and contribution to the meeting.

AGREED – That the Chairperson on behalf of the Committee writes to the Cabinet Member conveying the observations of the Committee when discussing the way forward.

9 : URGENT ITEMS (IF ANY)

None received.

The meeting terminated at 8.25 pm

**CYNGOR CAERDYDD
CARDIFF COUNCIL**

ECONOMY & CULTURE SCRUTINY COMMITTEE

9 APRIL 2019

**DRAFT ECONOMIC STRATEGY: ECONOMIC DEVELOPMENT WHITE PAPER –
BUILDING MORE & BETTER JOBS**

Purpose of Report

1. To provide Members of this Committee with information ahead of scrutiny of the draft Economic Strategy: Economic Development White Paper, scheduled in the Council's published Forward Plan for Cabinet in April 2019.

Background

2. At Council on 30 November 2017, Councillor Goodway launched an Economic Development Green Paper '*Building More and Better Jobs*' for consultation; this is attached at **Appendix 2**. Full Council debated the Green Paper on 25 January 2018, as per the Council's procedure rules, set out at Point 21, Council Meeting Procedure Rules, Council Constitution (*pages 135-136*).
3. The '*Building More and Better Jobs*' Green Paper outlined the aims, objectives and intentions of the Administration with regard to economic development. It set out key issues and aspects regarding future investment and development in Cardiff and sought respondents' views on a series of questions related to these. The Green Paper also sought the views of respondents on a spatial strategy for the city, proposing the following focus for developments:
 - i. City Centre –business/ office-led mixed use development
 - ii. Cardiff Bay –leisure–led infrastructure development
 - iii. North Cardiff –innovation/ knowledge led growth
 - iv. East Cardiff – industry/ manufacturing, distribution and trade related
 - v. West Cardiff – sport- led infrastructure development.

4. The Green Paper asked respondents for their views on the following:
- Q1 - What are the key issues for the Cardiff economy?
 - Q2 - What should be the key indicators of success for Cardiff?
 - Q3 - What should Cardiff's role be in the city-region?
 - Q4 - How can we continue to engage with Europe in a post-Brexit era?
 - Q5 - What can we do to improve connectivity?
 - Q6 - How can we create more and better jobs?
 - Q7 - How can everyone benefit from growth?
 - Q8 - How can we become a smarter city?
 - Q9 - What should Cardiff's spatial strategy be?
 - Q10 - What can we do to support business development in the city centre?
 - Q11 - What can we do to support leisure activities in the Bay?
 - Q12 - What can we do to develop Cardiff West as a sporting destination?
 - Q13 - What opportunities are there to support industry in Cardiff East?
 - Q14 - What opportunities are there to support innovation in North Cardiff?
 - Q15 - How should we use events to support the city's economy?
 - Q16 - How can we make sure everyone benefits from growth in Cardiff?

Consultation Responses

5. The Council received over one hundred responses as part of the Green Paper consultation; the table below provides a summary of these:

Type of Respondent	Number Received
Individual	31
Councillors	12
Businesses	16
Universities	2
Arts Organisations	5
Cultural Organisations	3
Sports Organisations	2
Third Sector	2
Local Government & Public Sector	3
Tourism Summit	16
Brexit Roundtable discussion	10

6. Some responses were from organisations representing their members' views, such as the Federation of Small Business, bodies representing the city's diverse populations, the Business Improvement District and City-Region organisations. Between them, these member organisations represented over 5,000 members in the city-region. The responses from businesses included responses from large businesses and from SME businesses.
7. At **Appendix 1**, Members will find a Consultation Summary report that provides an overview of the main themes raised by respondents and includes selected responses. The report is structured around the consultation questions contained in the Green Paper, with a summary at the start of the key issues identified by respondents. These are:
 - i. Transport & Connectivity
 - ii. Support Business Development
 - iii. Cluster Development
 - iv. Inclusive Growth
 - v. Skills
 - vi. Wellbeing.

Draft Economic Strategy: Economic Development White Paper

8. Attached at **Appendix 3** is the draft Economic Strategy: Economic Development White Paper, titled '*Building More and Better Jobs*'. It sets out the Council's vision for the city's economy and key development priorities, in light of the UK Government's Industrial Strategy, Welsh Government policy and the role of Cardiff as the capital of Wales and in the city region.
9. The draft Economic Strategy highlights that productivity in Cardiff lags behind many of the UK's leading cities and that the economy needs to step up to the next level and provide better jobs for the people of Cardiff and the city-region. It states that this:

'.. requires the city to understand and communicate what it is good at and co-ordinate activity between business and government to develop a more productive and innovative business base.' *Page 4, Draft Economic Strategy*

10. The draft Economic Strategy is set out in three parts:
 - i. Key spatial priorities
 - ii. Key industrial strategy priorities
 - iii. Underpinning themes to support the above.

11. The Key Spatial Priorities are:
 - i. Metro Central and the City Centre
 - ii. Kick-starting the Bay
 - iii. A New Focus on Industry
 - iv. The Knowledge Corridor
 - v. Continuing our Sporting and Cultural Renaissance

12. The Key Industrial Strategy Priorities are:
 - i. The City as a Creative and Digital Accelerator
 - ii. The World's Leading Compound Semi-Conductor Cluster
 - iii. The UK's dedicated Reg-Tech and Fin-Tech Cluster
 - iv. A new approach to Life Sciences

13. The Underpinning Themes are:
 - i. Inclusive Growth and Skills
 - ii. Developing Business throughout the City
 - iii. A Working City-Region
 - iv. Enabling Infrastructure.

14. Further details on key projects associated with these are provided later on in the Strategy, as follows:
 - i. Spatial strategy projects – pages 24 – 31, Appendix 3
 - ii. Industrial strategy projects – pages 32 – 36, Appendix 3
 - iii. Underpinning themes projects – pages 37 – 42, Appendix 3.

15. The relationship between the Economic Strategy and the over-arching Cardiff Well-being Plan is set out on page 23, concerning Well-being Plan Objective 1 – A Capital City that works for Wales, and Well-being Plan Objective 5 – Supporting People out of Poverty. These objectives, along with the Corporate

Plan objectives regarding visitor economy and investment, are added to the Green Paper objectives, resulting in a table of proposed Key Performance Indicators, at the bottom of **page 23, Appendix 3**.

Full Council debate

16. At Full Council on 28 March 2019, Members had the opportunity to debate the proposals put forward in the draft Economic Strategy, which is the Economic Development White Paper, attached at **Appendix 3**. In presenting the White Paper to Council, Councillor Goodway highlighted this was a chance for Members to influence policy and that no doubt this Committee would wish to take account of the views expressed in Council. The following points were made by Members during the debate that ensued:

- i. Welcome debate coming to Council first, to enable Council to influence policy direction;
- ii. It was felt by some Members that there is a lack of detail and substance in the draft Economic Strategy, in terms of specific deliverables and timescales; the following examples were given:
 - The draft Economic Strategy highlights inclusive growth and tackling poverty; however, it provides no clarity re how the draft Economic Strategy will address these;
 - Education – young people not in employment, education or training (NEETs) - the draft Economic Strategy does not itemise how it will help the Council to reduce NEETs;
 - Young People in Care – no details on how the draft Economic Strategy will improve their job opportunities;
 - Inequalities – particularly for females, BME communities and deprived communities – lack of suggestions in the draft Economic Strategy re how these will be tackled;
- iii. The draft Economic Strategy does not focus on some areas that some Members feel are key; the following examples were cited:
 - Opportunities that arise from removal of Prince of Wales Bridge tolls, the M4 relief road and the changes to business rates;

- Education – how to integrate Cardiff’s universities and businesses with schools to help develop skills set for the future;
 - St Mary’s Street – needs a refresh;
 - Sustainable economic growth/ infrastructure and the need to aim to be carbon neutral.
- iv. Concern expressed to ensure that the draft Economic Strategy aligns with the Council’s Local Development Plan;
 - v. Concern expressed that there will be separate draft Economic Strategy and Transport Strategy, given the importance of transport to economy;
 - vi. Concern expressed that need a 24-hour bus system to support Cardiff’s 24-hour economy
 - vii. Concern expressed re metrics detailed in the draft Economic Strategy in that they focus on growth rather than sustainable growth and that there is a need to include wellbeing measures as well.
17. In responding to the above points, Councillor Huw Thomas, Leader of the Council, stated that the points made regarding NEETs, Inequalities, sustainable economic growth, the aim to be carbon neutral and the need for inclusion of wellbeing measures were good points; he also stated that the administration would look at the interface of the draft Economic Strategy with the Education Strategy.

Previous Scrutiny

18. In 2013, the Committee held a workshop to scrutinise ‘*Rebuilding Momentum: A Green Paper on the Future of Cardiff’s Economy*’. The Committee’s response is attached at **Appendix 5**, for Members information.
19. In January 2018, the Committee scrutinised the ‘*Building More and Better Jobs*’ Consultation Green Paper. The Chair’s letter is attached at **Appendix 6**, for Members information.
20. In November 2018, the Committee considered the route that the Economic Development White Paper should take, in terms of presentation to Council,

Scrutiny and Cabinet. Members agreed with Councillor Goodway, Cabinet Member Investment & Development, that enabling Council to debate major policy statements prior to decision assists in making Council more meaningful. This Committee therefore supported the proposal to take the Economic Development White Paper to Council and then bring it to this Committee for pre-decision scrutiny.

Way Forward

21. Councillor Russell Goodway (Cabinet Member – Investment & Development) may wish to make a statement. The following officers will be in attendance to give a presentation and to answer Members' questions:
 - i. Neil Hanratty (Director of Economic Development)
 - ii. Jonathon Day (Operational Manager – Economic Policy).

Legal Implications

22. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

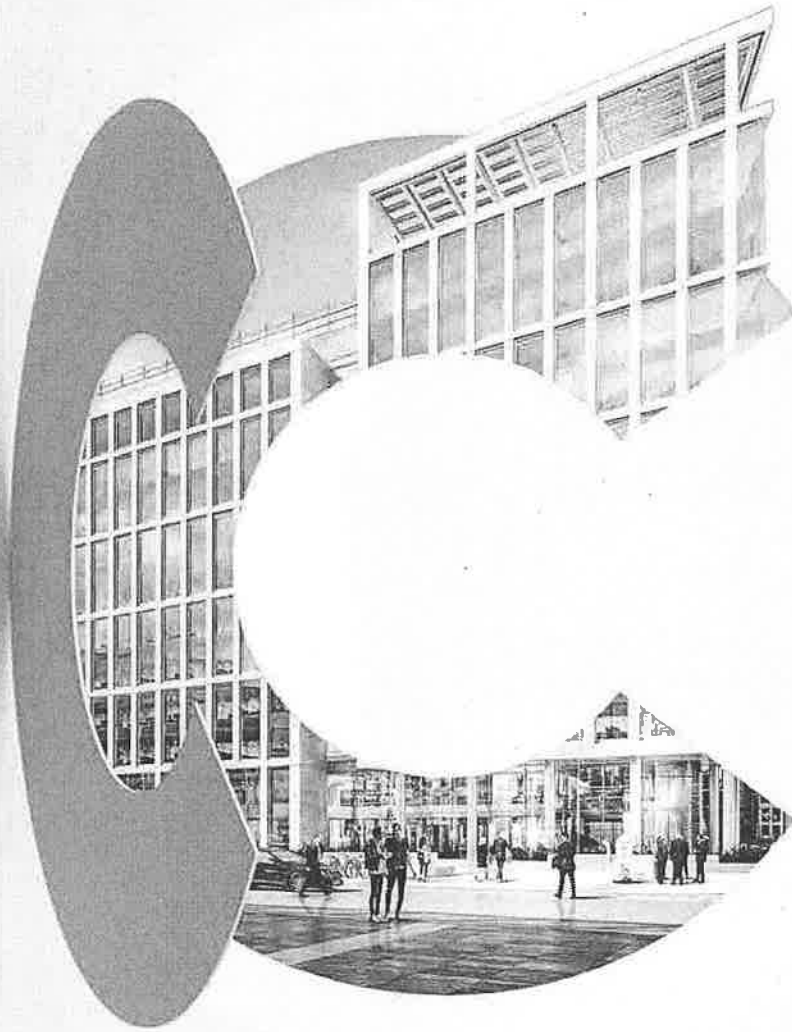
23. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any financial implications arising from those recommendations.

Recommendation

24. The Committee is recommended:
- a. to consider whether it wishes to pass on any comments, observations or recommendations to the Cabinet or other part of the Council;
 - b. to discuss whether it wishes to schedule any further scrutiny of these issues.

Davina Fiore
Director of Governance and Legal Services
3 April 2019

Appendix 1



Economic Green Paper **Consultation Summary**

Economic Green Paper Consultation

Consultation Response Summary

A public consultation was held based on the Economic Green Paper *Building More and Better Jobs*. The paper was available on the Council's website and publicised through local and social media.

In addition, specific representative groups were engaged to ensure a broad coverage of Cardiff's communities.

A number of sessions have also been held with businesses and other key stakeholders to consider the Green Paper.

Overall responses have been received from representatives of business, education, the third sector, sport, arts and culture and local government.

Respondents were not required to answer all or indeed any of the questions included in the paper. These were intended to prompt thoughts and discussion. The feedback received therefore varied considerably in length and detail. A summary of the responses is provided below.

Headline Issues

Overall, responses to the Green Paper were positive. Generally respondents supported the content, both strategically and in terms of project detail. However there were a number of issues raised that were either felt to be omitted, or require additional consideration. A summary of the 'key issues' section is provided below:

Transport and Connectivity – a large number of responses cited the importance of reducing and mitigating for congestion, as well as the need to improve transport links within the city and between cities generally. Congestion was seen as both an inhibitor to growth, whilst improvements in transport would aid both productivity growth and the accessibility of jobs. Digital infrastructure was also identified as an area in need of improvement. The Metro was also raised as an area of potential, and that more needs to be done to fit in with the opportunities this would present.

Support Business Development – it was highlighted that whilst major projects are important for Cardiff, there also needs to be more consideration of small and medium sized businesses in Cardiff. The abundance of small and medium-sized businesses throughout Cardiff's communities, including in district centres and suburban locations, were highlighted as areas of potential.

Cluster Development – it was suggested that Cardiff needs to consider areas of cluster development in Cardiff, partly to respond to the UK's Industrial Strategy, but also in terms of developing specialities to improve productivity growth. In particular the creative and digital sectors were identified as sectors with current strengths and the potential to grow. For example, the National School of Journalism and Media, the BBC R&D facility in the city centre and the burgeoning production sector presents an impressive offer to government and industry. Similarly, data analytics and cyber security are increasingly significant sectors and Cardiff has a key opportunity to build on its success with HMRC's new data analytics department and Alert Logic.

Inclusive Growth – it was identified that more recognition needs to be paid to under-represented groups, and especially those groups performing poorly economically. Whilst the Green Paper did talk of inclusive growth it was felt that more was required to respond to these issues. It was noted, for example, that employment rates for disabled people, transgender people, some BAME people; and Muslim women are far lower than average. Overall, the idea of inclusive growth struck a chord with many respondents, recognising the challenge of ensuring everyone in Cardiff can benefit from its development and success.

Skills - the support for inclusive growth ties in with a number of comments received around business and jobs, but also highlighted the importance of building a skilled workforce that can take advantage of new jobs, and connecting people with businesses. There was agreement that strengthening the presence of the knowledge economy in the city is imperative to its success, through the role of Higher Education in providing an educated labour force and promoting economic and commercial innovation.

Wellbeing – it was also highlighted that we should not look at the economy in isolation from factors such as education, health and social care, and that there needs to be alignment with the city's Local Well-being Plan. It was also noted that there needs to be consideration of environmental issues – not just in terms of the impact on local residents, but also in terms of economic opportunity.

Selected Responses

"It is great that the Council sees Cardiff growing in the future but I would be more interested in hearing about how it plans to tackle our road and transport problems which are a big issue right now."

"Overwhelmingly, the three primary concerns for SMEs responding to us [from their survey] are:

Congestion: A large number of respondents highlighted broad congestion issues in the city, and occasionally more localised issues. A number of respondents positively welcomed moves to decrease car usage in the city by investing in public transport, however a small minority were vocally opposed to increased provision of bus and bike lanes in the city centre. In general, plurality of respondents felt that congestion and public transport were key needs for the city.

Provision of infrastructure: Comments indicated that this included business premises, public transport infrastructure and digital infrastructure. Some responses suggested that the council should focus on the provision of digital infrastructure and public transport to reflect the changing nature of work.

Inequality: There is a strong sense that the benefits of economic growth and regeneration haven't been shared equitably in the city, both in terms of geographic and demographic spread."

"The Green Paper omits any mention of one of the most important issues, and opportunities; how to move to a zero-carbon economy."

"I query the overarching focus on jobs - especially the claim that jobs growth in itself is a positive - and worry that Cardiff Council may seek to achieve growth in this area indiscriminately. Quality jobs in sustainable sectors offer many gains, but I would prefer to see a broader aim to support wellbeing in the city and to explore the role of mechanisms such as timebanking to tackle the major challenges facing our city and society more generally. I therefore welcome the steps outlined in the section on making Cardiff an Inclusive Capital but would like to see a more transformational ambition and a more imaginative approach."

"We need people to have more money, so job creation is vital and paying people fairly is vital. Unless people have more money to spend, they won't be able to spend money in Cardiff to help the economy. While inward investment in jobs will help, the council could help more by paying people fairly and delivering a decent pay rise to the public sector."

"There is little recognition or explicit mention of inequalities and addressing this in Cardiff. We welcome the specific case studies and recognition of socio-economic inequalities in the city. However, employment rates for disabled people, trans* people, some BME people, and Muslim women in particular are far lower than average. Evidence of these disparities in Wales includes EHRC and Joseph Rowntree Foundation reports. These issues have not been addressed through improving educational attainment in schools alone.

We recognise that this is a strategic, high level paper. It is, however, important to identify inequalities in relation to employment and earnings and to ensure that specific, targeted actions are taken to address workplace attitudes to some groups, including pregnant women, and to support people into employment. It is also vital to address gender segregation in careers, and to ensure that access to training and career development is equitable. Some protected groups with relatively high employment rates experience disadvantage in career progression and are under-represented at higher grades in organisations.

We feel it is vital that the action plan and implementation of this strategy engages diverse communities and include targeted and specific actions to address the different experiences of diverse communities across the protected characteristics."

"NRW advocates sustainable development, informed by recent Welsh Government legislation. This would entail a focus upon total economic value (TEV), as recommended by The Economics of Ecosystems and Biodiversity (TEEB) and integrated wealth accounting such as that being developed by the World Bank."

What should be the key indicators of success for Cardiff?

Jobs Growth - Jobs growth was recognised as core indicator of success, however it was noted that the quality and sustainability of jobs was also important. One response felt that jobs might be too crude a measure and suggested the following:

- average level of pay to indicate the quality of jobs
- demographics of those in or not in work, for example in terms of gender, race, disability
- type of work, for example part time or full time

GVA per Head - Gross Value Added (GVA) per head was recognised as a valuable indicator, along with productivity. There was also concern from some that GVA may not fully reflect the economic picture in Cardiff.

Investment - one respondent cautioned against indicators for levels of investment, feeling that although investment contributes to a strong economy, it is not an end in itself and could be counterproductive if in the wrong areas.

Visitor economy - visitor spend was highlighted as a better indicator than visitor numbers as it was more accurately represented the economic impact of tourism. Conversely high visitor numbers, without spend, could simply result in added congestion.

Business Development – it was highlighted that no indicators were included that reflected the growth in the number or performance of Cardiff businesses, and that some measure that reflected entrepreneurial performance was required. It was proposed that some of the measures in the Global Enterprise Monitor reports could be considered.

Wellbeing – it was noted that indicators should align with those used in the Local Well-Being Plan.

Inclusive Growth - there were suggestions of using the Joseph Rowntree Foundation's 'Inclusive Growth Monitor' or something similar as an indicator. This also emerged in response to Question 7: How can everyone benefit from growth?

Selected Responses

"The aim of economic development should not be reduced to the number of jobs created but measured in people who lead healthy, fulfilling and connected lives. Economic activity is not an end in itself but is, rather, about creating the conditions for these outcomes to materialise. An economically successful city is one in which measures of health and well-being are high. Health, happiness and well-being are sound indicators and can be measured (e.g. great place to work surveys). It is therefore noticeable and regrettable that the word 'health' is used just once in the Green Paper and that simply in a passing reference to the health board. Unless we are using economic activity to reduce health inequalities, we will fail to meet one of our fundamental purposes.

We should also consider wealth inequality as a key indicator. One potential and simple measure could be the difference between the top and bottom 10% in the city. We don't want growth that only benefits the already wealthy. As an important aside, the concern should be about wealth not income inequality in order to deter policies to inflate asset prices (e.g. houses).

Finally, the green paper is too silent on environmental concerns. We would want to see measures that account for how economic growth is delivered in a sustainable manner."

What should Cardiff's role be in the city-region?

There was overall agreement that the city-region concept was important for the future of Cardiff.

Leadership - responses suggested that Cardiff should take a leadership role while also building relationships and reaching out to the surrounding communities that support it. Cardiff must also ensure that the economic successes of the city spread out to the city-region.

Scale - it is important to acknowledge that for Cardiff to compete on the international scale it requires the larger urban agglomeration of the region in order to be successful. It was felt that Cardiff can position itself to compete in terms of inward investment with London, Bristol, Birmingham, and the Northern Powerhouse, but only as part of a city-region.

Governance - it was recommended that any issues beyond Cardiff that could affect the ability of the paper's proposals to succeed should be identified, be that in the City Region, Wales, or the UK. Furthermore, it was suggested that the city-region should lobby Welsh Government to support more regional working, and that Cardiff should share its experience and expertise in economic development with its partners. There is, however, a need for strong governance, which better reflects democratic accountability.

City-region relationships - there was a sense that the paper should have a greater emphasis on the role of and potential benefits for the city-region. It was also suggested that more opportunities for people and businesses outside of Cardiff to feel benefits would create stronger buy-in from the wider city-region.

Transport - predictably transport has been identified as a core focus for development for the city-region, both in terms of the impact on Cardiff's transport infrastructure (and in particular the impact on inbound commuting on Cardiff residents) as well as its ability to share the proceeds of growth in Cardiff. The role of the city-region ports was also noted as important.

Gateway - Cardiff was also identified as the gateway to Wales, and has a significant role to play in both attracting visitors to sign-post to the city-region, as well as developing a core for businesses that could link in with the supply chain across the city-region.

Selected Responses

"The vision could be strengthened by giving more opportunities and hooks for people and businesses outside of Cardiff to feel the benefit and it needs a stronger focus on the whole regional benefit of this vision to create stronger buy in and enable the wider city region to get behind this."

"ABP has three ports within the Capital Region at Barry, Cardiff and Newport. The Green Paper should therefore recognise the role that ABP can play in the regional economy and provide support for the continual improvement of port and dock facilities and operations and by encouraging development of energy and infrastructure projects that are compatible with dock operations and the attraction of inward investment for manufacturing and other industries in locations that are conveniently co-located with the Port, as well as supporting the provision of appropriate transport links to the Port."

"One of the most important developments which is on the table is the Metro system and yet this involves a lot of strategic planning, so any major development which could interfere or severely restrict this possibility, should be part of the strategic planning objectives, when major planning decisions are before us."

"My fear and suspicion is that Councils such as your own are not sufficiently incentivised to work together with others, for fear of seeing the plaudits for any collaboration reflected in the economic data for the other councils, rather than your own."

"The city region concept will not succeed if Cardiff seeks, and indeed achieves, growth almost in isolation from adjacent areas. Therefore, the economies of adjacent local authority areas are relevant to Cardiff's strategy, and the city must adopt an approach that emanates from a strategic, regional one that identifies each as having a complementary role."

How do we engage with Europe in a post-Brexit era?

There was general support for the concept that Cardiff needs to ensure it has an international outlook and continues to engage with partners in Europe. It was also identified that Cardiff needs to work to identify new sources of funding for projects in a post-Brexit world.

Funding - it was felt that active participation by organisations within Cardiff in programmes such as Horizon 2020 and Erasmus+ will go some way to ensuring that the city remains open and tolerant post-Brexit.

Trade - the concept of a Free Trade Zone (FTZ) for Cardiff was suggested, in which goods could be imported, manufactured, processed and re-exported without the payment of import taxes. A FTZ could help to incentivise businesses to remain in the UK (rather than re-locate to the EU) or even attract new investment from foreign companies that could expand by using the UK as a base for their operations.

Current Links - there was support for maintaining and developing Cardiff's twinning links, and consulting with universities on any educational, economic, and cultural synergies within these. Beyond Europe, engagement with China and Africa were also suggested, with reference to Welsh Government's Wales for Africa programme.

Sport and Culture – culture, sport, exchanges between young people and tourism were cited as ways to continue engagement with Europe.

Selected Responses

"The report rightly refers to the threat from the impact of Brexit on the ability to attract and retain skilled workers but offers no proposals to deal with this. Equally, much non-skilled work is carried out by EU citizens and we need urgent plans in place to deal with the anticipated drop in these numbers. We must, however, continue to pursue European cultural engagement as much as possible outside the EU framework. A key driver for this will be with our universities where huge amounts of international collaboration takes place. We should, therefore, place universities at the forefront on our ongoing engagement."

What can we do to improve connectivity?

Transport was cited as one of the most significant themes emerging from responses. It was seen by both businesses and residents as the main inhibitor of growth, as well as being the issue that is most sensitive to growth itself.

Cardiff Airport - Several responses indicated the need for improved links between the airport and city. There is desire for further development of Cardiff Airport, including greater frequency of flights and exploration of the possibility for more long-haul flights.

Rail - There was widespread support for proposed new railway provision at St Mellons. The Queen Street to Cardiff Bay train was viewed as inadequate, whilst it was also thought that Queen Street station could offer a more welcoming environment. The potential of the Metro to radically change and improve sustainable transport throughout the City Region was recognised.

Bus - Bus was seen as an underperforming resource, with concerns around fares and confusing routes.

Roads and Congestion - It was acknowledged that the recently opened Ocean Way link has offered a new route to the Bay area but respondents felt that other roads around the city have been neglected. Residential parking was also cited as an issue, in particular in the Bay. Doubts were expressed about the effectiveness and safety of traffic-slowing measures, including speed humps. It was also acknowledged that a major shift away from private cars is important but the car is not going to disappear. Responses recognised the opportunity for a significant modal shift in transport and the associated impacts on quality of life and public health.

Trams - A number of respondents proposed a tram system for Cardiff, citing that many UK cities have modern tram systems, including Sheffield and Birmingham.

Cycling - There were numerous calls to make cycling a priority, and to place less focus on increasing road capacity and car focussed infrastructure that would only decelerate modal shift.

Walking - In terms of city centre movement, it was reported that fewer people now cut through the arcades because of the Central Square development work. Signage therefore is and will be especially important. An audit of signage was recommended to acknowledge changes of names and highlight new areas.

Selected Responses

"It is essential that the airport is a vibrant and connected part of the infrastructure, to reduce the current tendency of many to gravitate towards Bristol Airport."

"I took the opportunity last week to present this Green Paper to 50 businesses and I asked the businesses present to share one thought on the plan and I wonder if you can guess what it was - infrastructure. Every single business in that room was concerned that this City cannot cope with the growth that is planned, it is our job as a Council to reassure them that we can."

"The Capital City Region Metro is a potential game changing proposal, which aims to radically change and improve sustainable transport throughout the City Region. Whilst it is obviously important that Cardiff, as the capital city and largest economic entity within the City Region, realises a significant modal shift towards sustainable transport, it is equally important for Cardiff residents that accessibility and connectivity is similarly enhanced outside the city boundaries. Whilst Cardiff will provide a significant number of jobs within the city, there are many times more employment opportunities outside of Cardiff that the residents of Cardiff can, and in fact do, take advantage of. As a result Metro improvements will need to improve accessibility across the region, not just within the city itself, in order to provide appropriate transport provision for Cardiff's residents and workers. This needs to be specifically addressed in the Green Paper, which currently only addresses internal and incoming movements."

How can everyone benefit from growth?

Inclusive Growth - there was recognition that the benefits of economic growth and regeneration have not been spread equitably in the city, both in terms of geographic and demographic reach. Sharing benefits with people and places across Cardiff was encouraged, as was engagement with the third sector, local charities and social enterprises. One response suggested that to try to address this, a shared understanding of what Inclusive Growth means would be needed, as well as a meaningful set of metrics with which to measure it.

Social Enterprise - the Green Paper's commitment to an expanded social enterprise sector to support the Council's estate management and other services was welcomed. It was stated that social businesses can be at the centre of strong, local economies, playing a key role in creating more balanced economies and delivering sustainable growth, while fostering positive social change and innovation. Increased commitment to the Living Wage was encouraged as a way of ensuring basic fairness.

Foundational and Circular economies - the Foundational and Circular economies were also suggested as ways to make an impact on equality in economic growth. It was urged that the public sector in Cardiff spends as much of its purchasing power as possible within the local economy to ensure that the benefits remain in the city and region.

Local Business Development - one response urged consideration of a new approach focused on developing an inclusive economy through greater emphasis on building local economies. There was concern that there is too little support for small, local traders and producers, whose profits can potentially contribute more to the local economy than large chains. On a similar note, it was suggested that if Cardiff could retain more of the business rates it generates, especially given levels of growth, the additional money could be targeted to ensure that everyone can benefit, whichever part of the city they live in.

Public Procurement - further suggestions for ensuring an inclusive economy were to explore the community benefits of public procurement beyond the transactional elements currently monitored and to develop public private partnerships that could have an important effect on some of the most deprived parts of the city.

Education and Skills - it was felt that raising the levels of education and skills of children and young adults, especially in literacy and numeracy, was needed in order for them to benefit from opportunities. Furthermore, this work needed to be in close partnership with local communities, and address equality issues including gender and ethnic background. The importance of skills was also highlighted in the context of the workplace and urged that small and medium sized businesses have access to support and funding to improve the skills development of their workforces. There was support to continue promoting and even to expand the Cardiff Commitment as a way to ensure benefits of growth can be shared with young people across the city through job opportunities.

Diverse Communities - some felt it was vital to engage with diverse communities in implementing economic strategy. It was noted that some groups with relatively high employment rates can experience disadvantage in career progression and are under-represented at higher grades in organisations, demonstrating the need to identify inequalities in relation to employment and earnings and to ensure that targeted actions are taken to address workplace attitudes.

Selected Responses

"Research shows that poverty very often severely limits the life chances of children and adults. Amgueddfa Cymru has been strongly committed, for the last decade and more, to changing these outcomes for children and communities through cultural participation. Research shows that this can be highly effective as a strategy. We lead the research and evaluation of the Welsh Government's Fusion Programme on Culture and Poverty, and would welcome a strategic role in our work with Cardiff Council as well."

"We would encourage all organisations to be Living Wage employers – we have been an accredited Living Wage employer since 2014 – as this is one way of ensuring basic fairness that all people who work should get a wage which is enough to live on. A commitment towards the Foundational economy and the circular economy will also make an impact. We would encourage the public sector in the city/Wales to spend as much of its purchasing power within the Welsh economy to ensure that as much of the benefits as possible stick to the city/regional/national economy."

"The Green Paper's proposals around creating a more inclusive capital city are welcomed. We believe that in order to create more inclusive economic growth which benefits people and places equally across Cardiff, a new approach focused on building an inclusive economy is needed through greater emphasis on building local economies. We would urge the Council to consider this.

The Council could also consider how it could support social businesses in other ways, including:

- Ensure clear signposting for the co-operative option and specialist support through any other business advice support offered by the Council
- Supporting pre and new start social businesses as current support focuses on social businesses looking to grow.
- Ensure that social businesses are given business rates relief to give them the same economic advantage as registered charities.
- Use public sector procurement regulations to stimulate opportunities for social businesses. This includes making it easier for social businesses to bid for contracts; making use of reserved contract; and embedding social business within the community benefits reporting process.

Social businesses can be at the centre of strong, local economies, playing a key role in creating more balanced economies as ways of doing business that deliver sustainable economic growth while fostering positive social change and innovation. The Green Paper's commitment to an expanded social enterprise sector to explore establishment of community-based social enterprises to support the Council's estate management and other support services is welcome. To fully deliver the potential of this approach, we would urge the Council to consider learning from the Evergreen Co-operative Initiative in Cleveland, Ohio and a recent similar initiative in Preston, England."

"I think we also need to see more about how we are going to invest in local communities, whether that is local regeneration schemes rather than the bigger projects or whether that is investment in for example our local district shopping centres, again I think that is something that I'd like to see more detail about."

How can we create more and better jobs?

Better jobs - it was acknowledged that rather than just more jobs, which may be low-paid and lacking in training and development opportunities or career progression, it is appropriate to have an emphasis on better jobs.

District and local centre development - new office space around key city transport hubs was suggested to encourage smaller employment areas outside of the city centre. The importance of district and local centres in generating employment was highlighted, alongside attracting national and international business to come to the city.

Local Procurement - it was noted that there is no mention in the Green Paper of local procurement and how local business can both support and benefit from this plan.

Range and Choice - incentives for independent start-ups and SMEs would be welcomed by some respondents, however the need for these terms to be favourable to the public interest was also emphasised.

Creative economy - it was felt that investment in the creative economy and cultural sector would make the city region an attractive destination for all business, as a thriving arts sector makes a place more desirable in terms of quality of life.

Cardiff Commitment - continuing the Cardiff Commitment was endorsed as a way to help link young people with appropriate jobs.

Inward Investment - attracting more national and international businesses to the area was recognised as important for creating jobs.

Selected Responses

"New office space around key city transport hubs would encourage also smaller employment areas outside of the city centre. In addition, local and district centres could be encouraged to have a more diverse range of shops. Whilst rightly aiming for national and international business to come to the city, Cardiff Council should also bear in mind the importance of its district and local centres in generating employment."

"Subsidise businesses locating to Cardiff (long term); set up a science park; work in partnership with university education sector to attract start-ups; invest in creative economy and cultural sector to make the city region an attractive destination for all business (thriving arts sector makes a place highly desirable)"

"To a large extent, this is the consequence of all the other measures captured in our responses elsewhere. By and large, it is not councils that create jobs but businesses. That said, we could set Cardiff up as an ideal location to base the extra civil servants who will be needed post-Brexit to replicate the administrative work currently carried out by EU agencies. As one of the existing political centres in the UK, Cardiff would be ideally placed to do this. This aside, our role is an enabling one, creating the infrastructure for businesses and ambitious entrepreneurs to thrive.

We have to look to the sectors that are growing rather than declining, such as digital, technology and online. We need to encourage small and medium businesses to diversify rather than fight against these trends. We need plans for developing a strategy to work with employers on workforce planning."

How can we become a smarter city?

Leadership Role - the smart agenda was recognised as an important area and one in which Cardiff could demonstrate a key leadership role for the region. One response queried whether Cardiff's Smart City officer could also advise the broader region.

Infrastructure - ensuring basic technological infrastructures, particularly broadband, are in place across the city and the region was recognised as essential for a Smart City to work. It was noted that some areas of slow internet access remain, potentially including parts of the city centre. Conversely one response recognised how much digital capacity Cardiff already has and how it is currently underutilised. It was felt that other cities would envy the amount of fibre that Cardiff has, making it a significant selling point for the city. As with the question on connectivity, there was mention of electric cars being part of succeeding as a Smart City.

Smart Working - flexible working was also highlighted as key to future success as it will lessen demand for transport, especially at peak times, enable house-bound residents to contribute to the economy, and could make Cardiff even more attractive to business in terms of fibre capacity.

Citizen Engagement - there was enthusiasm for a broad public debate about data ownership issues involved in this area, and it was suggested that opportunities could be explored for using technology to increase and enhance citizen involvement.

Selected Responses

"Finally I'd like to turn to the section on Smart Cities, Smart Cities are about how Cities use technology or data and how we use those and how we deliver services; it's about modern cities right at the forefront of development. So how are we doing at present? Well, one indication is the UK smart cities index published just in October last year by HUAWEI, and that ranks the twenty cities in the UK that are taking forward the smart cities agenda, and sadly Cardiff was ranked 19/20, we are languishing a long way behind."

What should Cardiff's spatial strategy be?

Investment Zones - there was general support for the proposed spatial strategy, with the proposed zones seen as complimenting the city's strengths and with the potential to focus and attract investment aligned with the proposed zones. Overall, the rationale for the cluster approach was welcomed by many respondents.

'Fuzzy' boundaries – it was noted that we could not be overly specific or prescriptive in terms of activities within each zone. For example, it was also highlighted that the civic centre of Cathays Park, including a number of Cardiff's most significant heritage buildings, along with Cardiff Castle and Bute Park, are designated as part of the city centre business zone. Similarly, Cardiff Bay still has a commercial focus and this needs to be reflected.

Local Centres - in addition to the proposed spatial strategy, it was indicated that possible designation of some local and district centres could be explored and that this could help with promoting the local economy.

Green Spaces - some respondents wanted to see greater commitment to incorporating green spaces and community spaces into these developments to provide vital environments for people and wildlife.

Selected Responses

"The idea of zones around the City seems a good idea. Whilst I think, and I'm sure many will feel the same, that this in principle is a very good plan, before you even begin to think about any developments, Cardiff must get its act together and sort out the horrendous traffic congestion"

"The character and charm of the Edwardian city centre must not be lost; they are central to Cardiff's quality as a good place to live. Historic character is a key part of Dublin's image and success. No more characterless development projects, of the type that could be anywhere on the planet."

"I have on a number of occasions in this Chamber spoke about, what is nobody's fault, is a historical development, the geographical problem Cardiff faces is that its cultural commercial and industrial weight, sinks to its geographical South, and this map in a way demonstrates that problem. The developments identified are geographically to the South, and what the City faces is a sort of residential layering on top or above that that cultural commercial and industrial centre."

"We feel that the 5 subdivisions of the City economy are too crude to be meaningful for the purposes of analysis or to make sense to either citizens or visitors."

"We're concerned about the zoning impulse behind this green paper. For a start, we think it's hard to manage. By way of example, there is proposal for an innovation zone in north Cardiff, presumably heavily based around the city's universities, and yet we see the universities building new campuses in the south central part of the city. It is therefore not clear how you can shoe-horn independent businesses and organisations to fit into neat lines on a map."

"I believe that cities should develop organically. The council should concentrate on providing the infrastructure to enable this rather than restricting certain activities to certain areas."

"Finally we welcome the developing spatial strategy for the city and the focus on innovation in particular."

What can we do to support business development in the City Centre?

Metro Central - the role of the regional transport interchange, based around Cardiff Central station, was recognised as vital to supporting business development in the city centre.

Connecting the City Centre - it was felt by some that although developments including Central Square have transformed the centre of the city, this has to some extent been at the expense of areas such as Queen Street and the Capitol Centre. It was suggested that these areas could be better connected with nearby student residences and also the cultural and business environment for example around City Road. There was also a suggestion of expanding the Business Improve District (BID) to include City Road, or possibly creating a smaller, localised BID around this area.

Heritage - there were concerns that in the course of new developments Cardiff's heritage buildings should not be lost, as they are key to the city's character and quality as a place to live environments for people and wildlife.

Selected Responses

"Central Station has potential reputational damage, e.g. on match days, capacity issues, homelessness. The Central Square development represents a big opportunity. City Deal funding is in the right direction and will help provide a good first impression. We must also address the length of stays decreasing – impact on retail etc."

"The movement of Brains Brewery seems like a necessity in order to achieve the above however i'm conflicted as I'm astonished as to how little value the council sees in a key part of the city's heritage and what could be such a core tourist attraction. If it must be moved, can aspects of its architectural heritage be maintained? How can it become a core attraction in a position linking the city and the bay? Could it emulate the success of the Guinness factory in Dublin?"

"Some very positive proposals in the consultation document re the City Centre. In addition, it would make sense to see the west side of Plasnewydd ward, in particularly the City Road area, counted as part of the City Centre and coming under its umbrella policy-wise Going forwards I'd like to see the Council exploring a possible mini-Business Improvement District for City Road (maybe also including Crwys Road) or, alternatively, seeing if City Road can be incorporated into the body of the main BID when/if it's renewed in a few years' time."

What can we do to support leisure activities in the Bay?

Indoor Arena - there was support for a new, larger arena to attract more visitors to Cardiff but a number of respondents highlighted the need for improved transport infrastructure to support this. There were some concerns about the potential impact on other businesses of moving the arena away from the city centre.

Events - it was suggested that the Bay would be an ideal location for festivals and open-air performances and events. Views were expressed about some of the events that regularly take place in the Bay and it was felt that there should be more emphasis on supporting home-grown talent.

Active Travel - it was noted that the journey from Cardiff centre to the Bay could be improved and people could be encouraged to walk if the route was more attractive and mixed use, whereas now it was described as "windswept and unwelcoming". Many responses recognised the need for improved sustainable transport options between the city centre and the Bay.

Culture - there was strong support from many respondents for a new contemporary art space in Cardiff Bay, including the potential benefits for tourism, communities, education and the creative industries. The importance of visual arts, and art and culture more generally, were highlighted, including for well-being, physical and mental health, social mobility, and educational attainment. It was felt that Cardiff is well-placed to host a major annual or biennial visual arts project that could act as a catalyst for different organisations and individuals to come together and present exhibitions in a range of formats, including a strong element of community engagement and the creation of opportunities for diverse communities to become producers of artistic content.

Cardiff Story - it was felt that the proposed move of Cardiff Story from its current city centre location to the Bay would be a significant change in Cardiff's cultural offer and would need careful consideration. It was noted that the current location in the Old Library building makes it accessible to shoppers and tourists, who may combine a visit with other nearby cultural attractions such as Cardiff Castle and Amgueddfa Cymru. Subsequently any development around this needs careful consideration with all key stakeholders. It was however recognised that a move to Cardiff Bay could be positive for the Cardiff Story Museum, provided it is supported with sufficient resources and as part of a wider cultural redevelopment. Cardiff Bay could provide the potential for a larger venue with specialist galleries and increased storage facilities, enabling the museum to better tell the story of Cardiff.

Mixed Use - there was some concern that, while the focus of the Green Paper for the Bay is understandably on leisure, the already significant desirable office space, studios, and creative hubs in the Bay are barely mentioned. It was felt that a successful waterfront regeneration scheme requires more than just tourism to be sustainable, and that there needs to be recognition of what is already in place and careful master planning for the Bay to flourish. It was also suggested to better join up different sections of the Bay that may currently be perceived as quite separate, for example between the Sports Village peninsula and the Mermaid Quay area.

Selected Responses

"What can we do to support leisure activities in the Bay?"

- Make it more possible for small independent cafes and restaurants to set up in Cardiff Bay. The chains are boring and of fairly low standard. So it would be great to see more around Mount Stuart Square
- Great idea to develop the area around the Graving Docks - Take inspiration from the many stories around the transformational power of major high quality Contemporary Art Galleries e.g. Guggenheim in Bilbao, Tate Liverpool, Jerwood Gallery Hastings, Turner Contemporary Margate and create such a space in Cardiff and link in a Cardiff Contemporary that matches the best that we know - Edinburgh Festival, Venice Biennale....
- Continue with your excellent Marathons - they bring fresh dynamic energy to the area
- Pedestrianise the bottom of Bute St from the Cardiff Bay train station to Mermaid Quay, add some trees and out door seating .
- Make the walk from the city centre to the Bay more attractive. Once upon a time Lloyd George Avenue was going to be the new Ramblas. Couldn't this long straight walk way have markets?
- Make Cardiff Bay a place that you want to explore - it has so much history and culture already"

"Successful European Capital Cities have a strongly developed, modern cultural infrastructure. Despite some having two national cultural venues (St Fagans and the Millenium Centre) of truly international standard, and one other (National Museum Cardiff) with outstanding internationally significant collections but otherwise poor facilities, Cardiff as a whole does not have a cultural infrastructure that is up to European standards."

"I agree that the institution should have a contemporary focus however I would suggest it could take the form of a museum that covers both contemporary art and design from 20th century onwards. Why add design? It's all around us - in everything we do, own and experience. By including design and design education in Wales' agenda we open up key opportunities for engaging visitors, and crucially local communities with design education that supports long term business opportunities and economic growth."

"A landmark contemporary art gallery is about so much more than the visual arts. It displays a bold confidence from a city which, in part, says that the city is stepping up in to a national and international dialogue around arts and culture that extends way beyond city or country borders."

"I would suggest that, despite challenging financial circumstances, a long-term objective should be for Cardiff to have a more distinctive 21st century space or spaces of scale which would generate real excitement amongst artists and audiences, and enable Cardiff's contemporary arts offer to be more visible within the national and international landscape."

"Cardiff Bay offers a unique and inspiring waterside setting for businesses within our coastal capital, both supporting and flourishing alongside its impressive culture and leisure offering. Established commercial residents include international players such as ARUP, Atradius, Lloyds Bank and KPMG as well as an eclectic mix of creative, financial and professional services companies of all sizes. They have chosen it for its open space, inspiring views, easy access, safe and secure atmosphere and choice of excellent accommodation."

"A significant improvement to the cultural offer is imperative to increase visitors and keep them returning. Galleries are an excellent way to celebrate a culture and the other cultures of the world as well as posing challenging ideas and offering a platform for discussion. The gallery and museum offer in Cardiff is small in comparison to all other European and UK cities."

"[The Bay] lacks a heart and the opportunity to browse shops. Whilst appreciating the trend to on-line shopping, many consumers (particularly when they are visiting an area) like to shop for unique products that are not widely available from retail chains. This could be an opportunity for the development of Cardiff Bay."

"I support the development of the area near to the Coal Exchange and think encouraging young, vibrant, independent businesses is key to assisting the bay to achieve the 'cool' edge its drastically missing. I'd be keen to understand how the council will support small/local businesses through reduced business rates - not just in the initial year but over a decent period which would allow businesses to thrive and create long term economic development in the area."

"Bringing international professional artistic exhibitions to the city would also bring people to Wales. For example, the way in which the FA cup broadened the city's reach for Sport, a contemporary art gallery that could house shows from London, New York, Paris, would bring people from all over the UK and Europe to see the exhibitions bringing a massive investment into the city through local businesses. Contemporary art is a massive part of everyone's daily life and has to be an integral part of the development of a capital city. So please build a new contemporary art space and let the city be known for culture."

"Galleries are successful at attracting a broad range of visitors; they are particularly effective at attracting younger and older visitors as well as those from minority ethnic groups."

"What has been done to the Cardiff Bay railway station, nothing absolutely nothing a true disgrace. So I will object as usual, I know it is a waste of time but I do my duty as a concerned citizen standing up against the money men destroying our environment."

"There is already significant desirable office space - much of which has recently been sold to a large investor - and there are also the BBC studios / Gloworks creative hub which barely get a mention. A successful waterfront regen scheme needs more than just tourism to be sustainable, and if the Bay is to flourish suggest there needs to be a recognition of what is already in place and properly considered masterplanning for the future."

"The 'High Line Nine' galleria, a subset of this new gallery collection, was inspired by European gallerias but takes the concept to a new level. It is a collection of nine full service and highly amenitized boutique exhibition spaces, ranging from 650 sf to 1800 sf, located along a central throughway directly under the High Line. All of the spaces in the 'High Line Nine' have skylights over art walls ranging from 13' to 22' high and ability to add private offices and/or storage. Centralized restrooms are provided and there is even a wine bar/café and catering kitchen to service all of the many events."

What can we do to develop Cardiff West as a sporting destination?

Role of Sport - Cardiff's role in sport, particularly in terms of high-profile events, was not disputed. Attracting large-scale sporting events was recognised as important for Cardiff and its development as a sporting destination. It was suggested however that the city could give greater recognition to facilities elsewhere in the region that seek to promote community-based sporting activity in conjunction with professional organisations. The Centre for Sporting Excellence in Ystrad Mynach, was given as an example of a community-focused approach yet serves the needs of both local and professional clubs active within the region through its establishment of links with the FAW, WRU and the Dragons region. It was also felt by some that sport is already at saturation point as an economic asset for Cardiff and that greater emphasis should be given to arts and culture.

Spatial Strategy - there was some concern that the spatial strategy does not acknowledge the existence of important sporting clusters in the city centre such as the Principality Stadium, Arms Park Stadium and the former SWALEC stadium in Sophia Gardens. It was felt that this significant cluster of facilities should be mentioned in addition to sporting infrastructure in Cardiff West.

Infrastructure and Development - the existing transport infrastructure afforded by the Cardiff Bus depot and Ninian Park railway station was noted as a valuable asset for Cardiff West's sporting offer. There was agreement with the proposal to redevelop Sport Wales, investing in facilities fitting for a capital city setting. It was acknowledged from some that the potential for a new stadium for the Cardiff Blues should be explored but it was felt that this should not be a 'multi-purpose' venue that might compete with other venues including the proposed multi-purpose arena and lead to saturation in Cardiff.

Selected Responses

"Sport Wales needs major investment – the facilities are tired and not what you would expect of a capital city."

"The International Sports Village area currently lacks character and identity and the arena could help boost transport links to this part of the city which needs more development than the preferred site."

"Cardiff West, especially around Leckwith Road/Sloper Road is developing as a sporting destination already. With the Cardiff Bus depot and Ninian Park railway station located in the vicinity any future developments can use this easy transportation access to get supporters to and from their event."

What opportunities are there to support industry in Cardiff East?

Spatial Strategy - there was some concern around the exact extent of the industrial area proposed in the spatial strategy, and whether this would include streets to the south of the railway line. It was felt that key central roads in the area such as Splott Road and Clifton Street have huge potential for small businesses in existing units but are often perceived as areas where no investment takes place, with the exception of the new rail bridges. One response hoped that industrial development would maintain historical parts of the area and support the growth of small businesses.

Sector focus - it was felt by some that an industrial strategy should focus on a shift to sustainable industries of the future and transitioning away from fossil fuel-based industries.

Transport links - it was seen as vital that transport infrastructure is improved so that goods can be more easily moved from this area, largely eastward from Cardiff towards England. It was felt that congestion around Rover Way needs to be addressed and the Eastern Bay Link Road completed. There was widespread support for the proposed new rail infrastructure at St Mellons, strengthening the position of industry in Cardiff East, but desire for assurance that this would be sensibly placed so as not to disrupt key residential areas of Splott. It was acknowledged that the location of the Port of Cardiff and Euro Freight Railway Terminal make East Cardiff an advantageous site for manufacturing and logistics firms, and that this development would build on existing uses and occupiers.

Trade - The Free Trade Zone (FTZ) idea that was suggested as part of engagement with Europe post-Brexit could have benefits for industry, encouraging businesses to remain in the Cardiff or event attracting new investment from foreign companies that could expand by using Cardiff as a UK base for their operations.

Selected Responses

"It is essential that the transport infrastructure is improved so that goods can be moved more easily from this area mainly towards the east of Cardiff (towards England). In this sense congestion around Rover Way has to be addressed and the need for the Eastern Bay Link Road to be completed is high, particularly as new investment in facilities in this area will add to the congestion. Sufficient land in close proximity is needed to support the organic growth of existing industrial companies. In order to provide the right competitive conditions for the types of businesses desired, give an incentive by way of reduced business rates for recycling companies."

"ABP recognises and supports that the East of Cardiff area is proposed to be the key industrial and logistics employment area of the City (associated with the Port and the Rail Freight Terminal). The proximity of the port to the East of Cardiff area, providing multimodal facilities (rail, road and sea) to the UK, ensures a significant opportunity for the City and Capital Region to locate value added manufacturing near to the port as a key logistics hub."

It is important however that the Green Paper recognises that in support of the employment proposals in the East of Cardiff, that appropriate key transport infrastructure is delivered linking such areas with the Port."

"Any industrial strategy should focus entirely on a shift to sustainable industries of the future and transitioning away from dirty, fossil-fuelled industries."

"You need to concentrate on the people of Splott the long term residents give them grants to do up their properties and maintain them"

What opportunities are there to support innovation in North Cardiff?

Spatial Strategy - the proposed Innovation Campus was welcomed as a good idea and a high priority for the city. Cardiff's dominance within the region in terms of knowledge-based industries was recognised and it was agreed that the city needs to operate as strongly as it can in these areas in order to maximise benefits not only for the city but also the region as a whole. New development of this type in the north of the city was supported as it will consolidate Cardiff's role within the regional context.

Approach to Innovation - The development of co-working campus environments was encouraged, as it was felt the commercial model is increasingly based on flexible, attractive workplaces that cluster companies around common goals and sectors. It was suggested that an open and innovative approach to investment models would be required and there could be income stream opportunities from both public and private sector occupiers for more flexible lease packages and easy access to common areas.

Selected Responses

"Our Innovation Campus, reputation for world leading research and impact, and our ability to attract and recruit the best talent (Wales, UK and internationally) to the city are just three examples of where we can work more strategic with the Council to leverage greater, and mutual, added-value to the City and regional economy."

How should we use events to support the city's economy?

More 'Local' Events - responses included recognition of the success and impact of major international events but also highlighted the potential for more home-grown, local events that can deliver for the people of Cardiff and build on the success of City of the Unexpected. One response emphasised that major sporting events should not prevent local traders from earning their living.

Hotel Space - in addition to transport concerns, some respondents felt that hotel stock in Cardiff is insufficient for major events, leading to large price increases at times of key demand. In particular, the lack of high quality 5* hotel provision in the city was noted.

Culture - it was felt by some that there is a tendency to focus on sports events and that the wider cultural offer should also be developed, in order to enhance Cardiff's reputation and enable the city to compete on the international cultural stage.

Transport - there were concerns around transport provision for major events, suggesting that a more coordinated approach may be needed between relevant partners to ensure an adequate transport offer for residents and visitors.

Music Strategy - Cardiff's Music Strategy was supported and described as a good example of the Council listening to its community. Securing the future of live music in Womanby Street was recognised as significant and the opportunity to feed into the music strategy to reflect the music community as a whole. There was enthusiasm for Cardiff to bid for UNESCO City of Music status as an outcome of the strategy.

Selected Responses

"While we believe it is important to attract major cultural events into the city, we welcome the focus on developing home grown events and festivals to deliver for the people of Cardiff and the desire to build on the success of City of the Unexpected. Securing the future of live music in Womanby Street is crucial and Creative Cardiff has appreciated the opportunity to feed into the music strategy which will reflect all of the music community. We are also keen that Cardiff bid for UNESCO City of Music status as an outcome of the strategy."

"One of the key areas where Cardiff needs to develop is with its accommodation, which has lagged behind the increase number of major events. To get a hotel room during events is often difficult and certainly expensive. This sector needs to be enhanced with additional hotel rooms enabling more visitors (both during and outside of events) to Cardiff."

"Major events are vital to the city's economy and tourism. Greater collaboration with local businesses is needed to ensure the likelihood of major events having a positive impact is increased. Open consultation with local residents and academics / Universities is also needed to evaluate the success of events and calculate their economic impact e.g. UEFA 2017 Final."

"Major sporting events shouldn't prevent local traders from earning their living. The Sunday Riverside market has had to be cancelled multiple times, including at short notice, due to major sporting events. This shutting out of small trader means that it's predominantly the massive companies that benefit from these events."

"The lack of support for local farmers' markets is disgraceful, in my opinion. Despite the noise made about increasing sustainability, it feels like the Council are not actually interested in supporting those traders who work far harder and contribute far more to the local economy - as more of local producer's profits return locally, as opposed to large chains whose profits are squirrelled away elsewhere."

"The wider cultural offer must be developed, as there is a tendency to focus on Sports events. Without a strong cultural sector, Cardiff will struggle to compete on the international cultural stage."

Creative and Cultural Cardiff

In addition to the issues identified above there were a lot of responses that suggested that Cardiff should promote and develop its cultural and creative sectors. A selection of relevant comments have been provided below:

Selected Responses

"Extensive research (for example in London) has demonstrated that a city's creative economy depends upon two other crucial requirements:

- (i) A creative society
- (ii) A strong cultural sector"

"We would broadly agree with the strengths, weaknesses, opportunities and threats outlined. Cardiff's cultural assets are a huge strength; from the National Companies to Artes Mundi, the UK's biggest contemporary arts prize based in the historic National Museum which houses one of the largest impressionist collections in the world.

We believe there is real scope for growth in the city's creative sector. In the period since the formation of Creative Cardiff in 2015 we've seen an uplift in the number of creative economy jobs listed on our website and have noted the creation of many small creative industries businesses, as well as the phenomenon of coworking spaces where freelancers and micro businesses can thrive. Our planned research for 2018 includes mapping creative hubs for British Council Wales and with a team of Cardiff University researchers, re-mapping Cardiff's creative economy to note growth since our 2015 findings of 2,788 creative companies, organisations and freelancers in the Cardiff area."

"How can the city host or facilitate growth for the creative sector and financial and professional services? Is there another city which has been an active rather than a passive partner in this process? Many other cities that I have looked into almost appear to have achieved this by accident, and those that have tried to play an active role have lacked authenticity and engagement from the community they seek to support."

"The creative sector is ambitious and international, with vision beyond its borders. The art school is producing some talented young artists and excellent research from the staff. However, there are currently not enough spaces in the city to support the growth of the creative community"

"The sector where Cardiff has the strongest employment specialisation is Music, performing and visual arts, with 1.2x as much activity as the UK average although this is felt to be made up of performing arts, where Cardiff performs strongly. The visual arts need further support and investment to compete and contribute on a larger scale."

"A centre for contemporary art in Wales should invest in its creative community and act as a learning resource/educational outreach space with schools, colleges and universities, but also the professional art community. It should act as a hub, with multiple spaces for artists of varying career levels - including a collection of works, test bed spaces for emerging ideas and accomplished exhibitions of more resolved ideas."

"For the purpose of this consultation we propose to place art into a larger context of "creative placemaking," a term that holds pivotal meaning for durational social, economic and regeneration projects. Through exploring how the creative placemaking construct is playing out in the larger field of arts and culture we can see how this can intersect the benefits of arts and culture with the economic development of Cardiff.

We believe that the arts can not only engage in the City's development but if positioned as a strategic partner can help shape the social, physical and cultural identity and its people by supporting economic development and the future well-being of communities. We believe that rather than standing outside plans and developments looking in, arts and cultural organisations

(existing and new) can step inside it and be a strategic partner for Cardiff Council from the onset working with agents in transport, regeneration, housing, environment, health and well-being and additional systems necessary for a stronger, more equitable City."

"We urge that, as a result of the Consultation, Cardiff will expand its economic strategy to include a Cultural Strategy. Otherwise Cardiff will continue to be deprived of one of the most significant drivers of economic growth and jobs, and will lag behind every other successful Capital City in its development."

General Comments

International Branding - increased communication with the outside world based on a strong social media offering was suggested, to encourage both businesses and potential visitors to consider Cardiff. A number of responses suggested the need for Cardiff to improve its international promotion

Third Sector - it was felt that the third sector needed to be better consulted and integrated into plans for Cardiff's economic development.

Community Engagement – local projects should ensure they are developed in consultation with their neighbouring communities.

Tourism - some responses focused particularly on tourism in Cardiff and it was proposed that the city could act more as gateway for tourism to the rest of Wales. There was some concern that the length of visitors' stays in Cardiff is decreasing, which in turn has an impact on other elements of the economy including retail and food and drink.

Well-being – there was also a wider recognition of the need for the economic agenda to be more closely aligned with areas such as health and well-being.

Sustainable development – sustainable development was seen as both a necessary requirement of interventions, as well as an area of opportunity. In particular the movement towards a zero carbon agenda was seen as an area that Cardiff could develop a competitive advantage in.

Governance – it was also recognised that local authorities currently have very little flexibility in resourcing economic development objectives, and that new ways of supporting development should be explored.

Industrial Strategy – Cardiff needs to provide a coherent and deliverable response to the UK's Industrial Strategy

Waterways – Cardiff should not forget that it is a waterfront city and should explore how it can connect more with its waterfronts.

Selected Responses

"We need to ramp up the communication to the outside world. Both businesses around the initiatives in the report and to potential visitors via a strong social media offering. I live here and I'm active across all of SM. I've yet to see a sponsored (PPC) link for any event in Cardiff or surrounding areas."

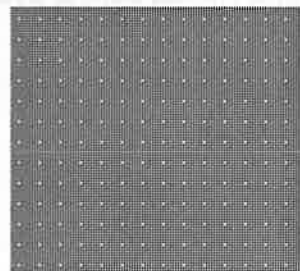
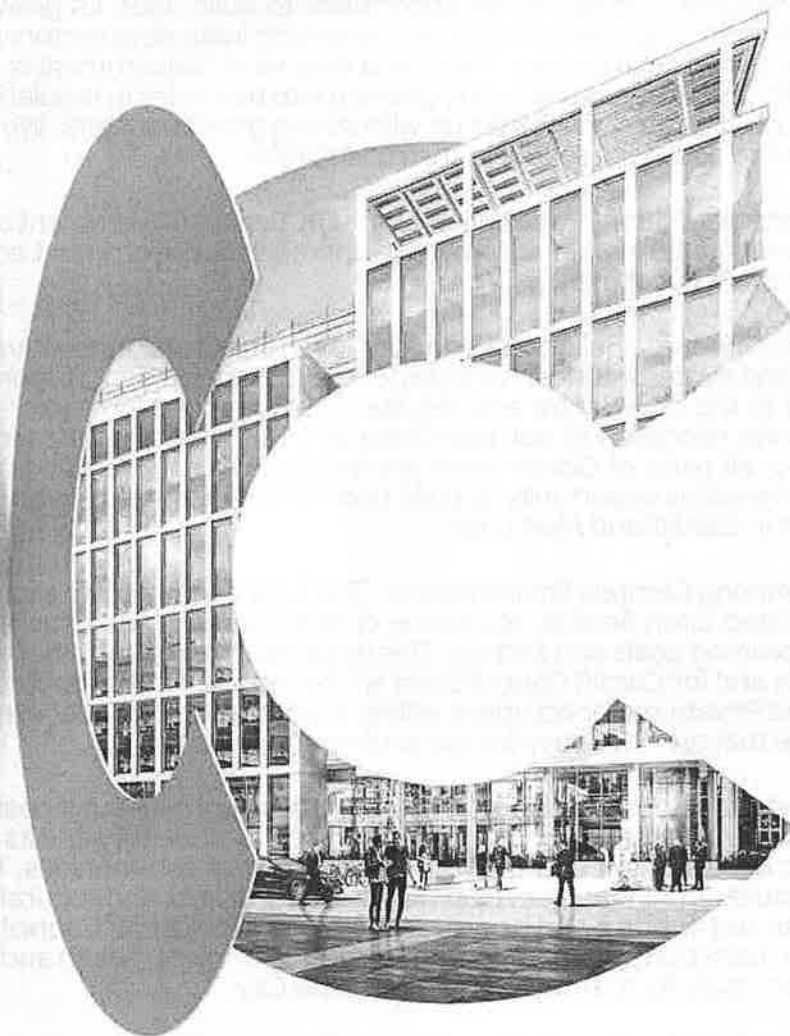
"Centre for Research on Socio-Cultural Change researchers have argued that the provision of foundational goods and services has been overlooked by industrial and economic policy in the UK and Wales, whose focus tends to be on high-tech processes and sectors."

"We view Cardiff's Economic strategy as an opportunity to build upon its growing reputation as a City that can deliver for both Government and emerging innovative sectors in the creative digital, cyber security and fin tech sectors. This is at a time when Government is beginning to once again invest in its property requirements, growing into new roles in regulation and looking to have a proactive industrial strategy that links up with strong growth clusters. We have 3 principal recommendations to the questions set out in the consultation

1. Maintain a strategic and senior relationship with UK Central Government at a pivotal time in Brexit planning. Cardiff to build upon its proactive approach to Government around relevant national policy areas as set out above.
2. Building Blocks Offerings; Build an offering to Government and Innovative Industry sectors from existing assets and success stories. For instance the National School of Journalism and Media, the BBC R&D facility in the City Centre and the burgeoning production sector present building blocks towards securing relocation of not just Channel 4 but wider Departmental requirements from DCMS. Similarly, all parts of Government are investing in data analytics and cyber security and Cardiff has a tremendous opportunity to build upon its success stories with HMRC's new data analytics department in Cardiff and Alert Logic.
3. Develop Co-Working Campus Environments; The future commercial occupancy model is increasingly predicated upon flexible, attractive, centrally located workplaces that clusters companies around common goals and sectors. This requires an open and innovative approach to investment models and for Cardiff Council there will be income stream opportunities from both Government and Private sector occupiers willing to pay a premium rent in return for a more flexible lease package that provides easy access to common areas."

We believe that the arts can not only engage in the City's development but if positioned as a strategic partner can help shape the social, physical and cultural identity and its people by supporting economic development and the future well-being of communities. We believe that rather than standing outside plans and developments looking in, arts and cultural organisations (existing and new) can step inside it and be a strategic partner for Cardiff Council from the onset working with agents in transport, regeneration, housing, environment, health and well-being and additional systems necessary for a stronger, more equitable City."

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Building More & Better Jobs

Consultation Green Paper



CARDIFF
CAERDYDU

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cover image courtesy of Les 15

Building more and better jobs

Cardiff is no ordinary British city:

Key facts:

We are growing faster than any other UK city



Faster growth in projected population than any of the UK Core Cities

We are creating more and more jobs



Faster jobs growth than any of the UK Core Cities - 15,000 new private sector jobs in past 2 years

We are attracting a bigger increase in international visitors than any other city.



Fastest increase in international visitors of any UK Core City

We have one of the UK's most skilled workforces



45% of the working age population have a qualification at NVQ4 or above

We are second to none in terms of quality of life



UK's number one city for quality of life

We have a growing reputation for world class research



Cardiff University ranked 6th in the recent Research Excellence Framework

We have strengths in creative industries, finance, tech and advanced manufacturing



Hub of Wales' creative sector, and over 60,000 employed in finance, business and communications

We are the heart of the Welsh economy



90,000 daily commuters, and more than half of the visitors to the city region

We are a city that has delivered. However, we know there is more to do.

Thousands of people in the city are still looking for work



Almost 10,000 people looking for work, with a 7% unemployment rate for 20-24 year olds

Income inequality persists



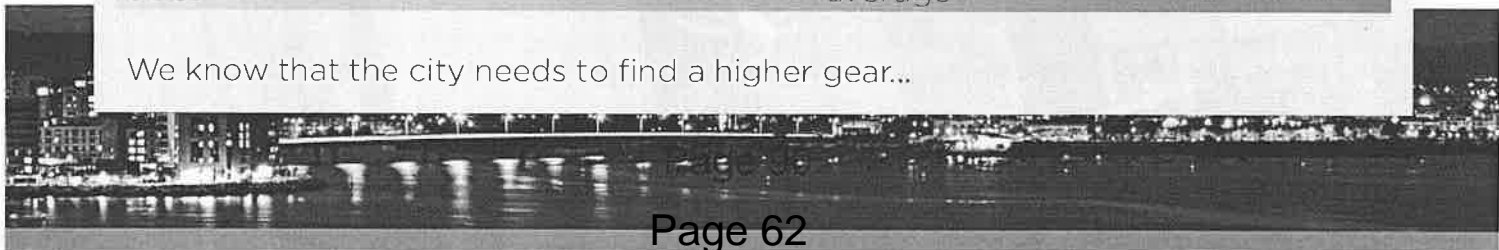
The top 10% of earners bring home 3 times as much as the bottom 10%

Productivity lags behind other cities



Productivity lags Core City average

We know that the city needs to find a higher gear...



Cardiff's regeneration story has been a remarkable one. It has transformed itself from a city weighed down by deindustrialisation in the 1970s to one of the most competitive in the UK. It is a young and talented city with a growing business base, a bustling start-up culture and a thriving visitor economy.

If we are to continue to deliver for the people of Cardiff and Wales however we cannot stand still. We must continue to drive forward investment in our city, and we must put in place the building blocks to fulfil our city's potential. We know that this potential is vast.

We will have a relentless focus on delivering more, and better, jobs for the people of Cardiff.

We also know however that in Cardiff the gap between rich and poor continues to persist and that some of Cardiff's communities are amongst Wales' poorest. It is imperative that we can translate our good economic performance into better outcomes for everyone in our city. In an economic climate dominated by austerity, which has hit the most vulnerable areas hardest, we have a responsibility to continue our city's story, delivering more and better jobs for people in Cardiff and driving forward the Welsh economy.

Cardiff's role at the heart of the city-region and Welsh economy is also critical. As the global economy becomes increasingly competitive, our city offers the best prospect for Wales to promote itself as a prime location for business. However, we also know that cities in Wales are underperforming in comparison with our neighbours in England. Historically policy, skewed by EU funding priorities, has shifted resources away from Cardiff. This has meant that people and businesses in Cardiff have had less access to public funding to invest in skills and enterprise than in other parts of Wales. It has meant that whilst Cardiff has been growing at a rate far exceeding anywhere else in Wales, associated funding for infrastructure has gone elsewhere. It is therefore essential that a new city-region approach for Wales recognises the role of its cities, and especially its capital city.

We also know that Cardiff is an important UK city. Part of the national productivity problem relates to the fact that its cities outside of London

are underperforming, and that the future of the national economy is dependent on raising economic performance in its urban areas outside the UK's capital. The UK Industrial Strategy identifies the strategy to tackle this, and identifies ideas, people, infrastructure, business environment and places as the foundations that will drive productivity gains. It is essential that Cardiff is part of this agenda.

We are well placed to respond to the challenge. We know that across the world cities are the beating heart of national economies. Cities are at the centre of the modern knowledge economy where it is people, rather than capital, that business is reliant on.

To do this we will build a more Connected Capital, securing investment in the physical and digital infrastructure that unleashes the potential of our city's people. We need to upgrade our city infrastructure to support the development of more home grown business and attract more inward investment. Moving beyond City Deal, our role as the driver of the city-region economy must be promoted and exploited. Cardiff must also continue to be an outward looking, international city, acting as the connecting point between Wales and the world.

We will build on our success as a Business Capital, with a relentless focus on creating new jobs and opportunities for people in Cardiff and across the city-region, raising productivity for the city and for the nation. We know that whilst Cardiff has been successful in developing and attracting jobs we need to continue to climb the value chain. We also know that if we are to raise income levels we will need to become more productive.

We will develop a more Inclusive Capital by providing a range and choice of jobs across the city so that everyone can access an opportunity to reach their full potential. We must ensure big city projects translate into economic prosperity, and the benefits need to be felt in all of the city's communities.

We will build a Smarter Capital, working with partners to leverage the investment potential of key high-value sectors: the creative and digital industries, and financial and professional services - sectors in which Cardiff already has companies with international significance. Our universities need to become central to our ambitions in the way that they haven't been in the past. The Council also needs to engage more with business and embrace the full potential of public private partnerships which has served the city so well in the past.



The Cardiff Economy

Examples of the strengths, weaknesses, opportunities and threats for the city's economy are provided below - but we want to know your views on where Cardiff performs well, where it doesn't, and where there is potential for the city to improve.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Capital City Status - driver of the Welsh economy • Fast growing and dynamic economy - proven ability to create jobs in competitive sectors • Well qualified workforce - 2/5ths qualified to degree or equivalent • Number 1 in the UK for quality of life • World class university research - Cardiff University ranked 6th in the UK • Greater city-region alignment and established governance • Sporting and cultural assets - including Europe's biggest covered arena • Advanced digital infrastructure 	<ul style="list-style-type: none"> • Relatively low levels of productivity - which in turn affects earnings • Low numbers of HQ operations - impacting on innovation and competitiveness • Pressure on the city's transport infrastructure - which is only due to grow • Lags some UK competitors in visitor numbers - capacity to improve • Large wage disparities - need to support productivity improvement for everyone • Poor international connectivity - physical and digital • Lack of urban policy agenda in Wales - reduces impact of 'agglomeration'
Opportunities	Threats
<ul style="list-style-type: none"> • Scope for growth in key sectors including financial and business services and the creative sector • Improving business infrastructure such as the world class BBC Drama Studios in Cardiff Bay • Growing economy brings opportunities for wider markets • Investment in Metro will unite the city-region and provide more opportunities • Growing visitor economy - growing faster than any other UK city • Potential to exploit benefits from Brexit such as removal of Structural Funds boundaries 	<ul style="list-style-type: none"> • Competition from other UK cities for mobile investment • Competition from other UK cities for mobile workforce - businesses are reliant on maintain a skilled workforce • Pressures of population growth will impact on infrastructure • Need to maintain and promote the 'Cardiff' brand in an increasingly competitive marketplace • Impact of Brexit on ability to attract and retain skilled workers • Need to keep pace with technological advances

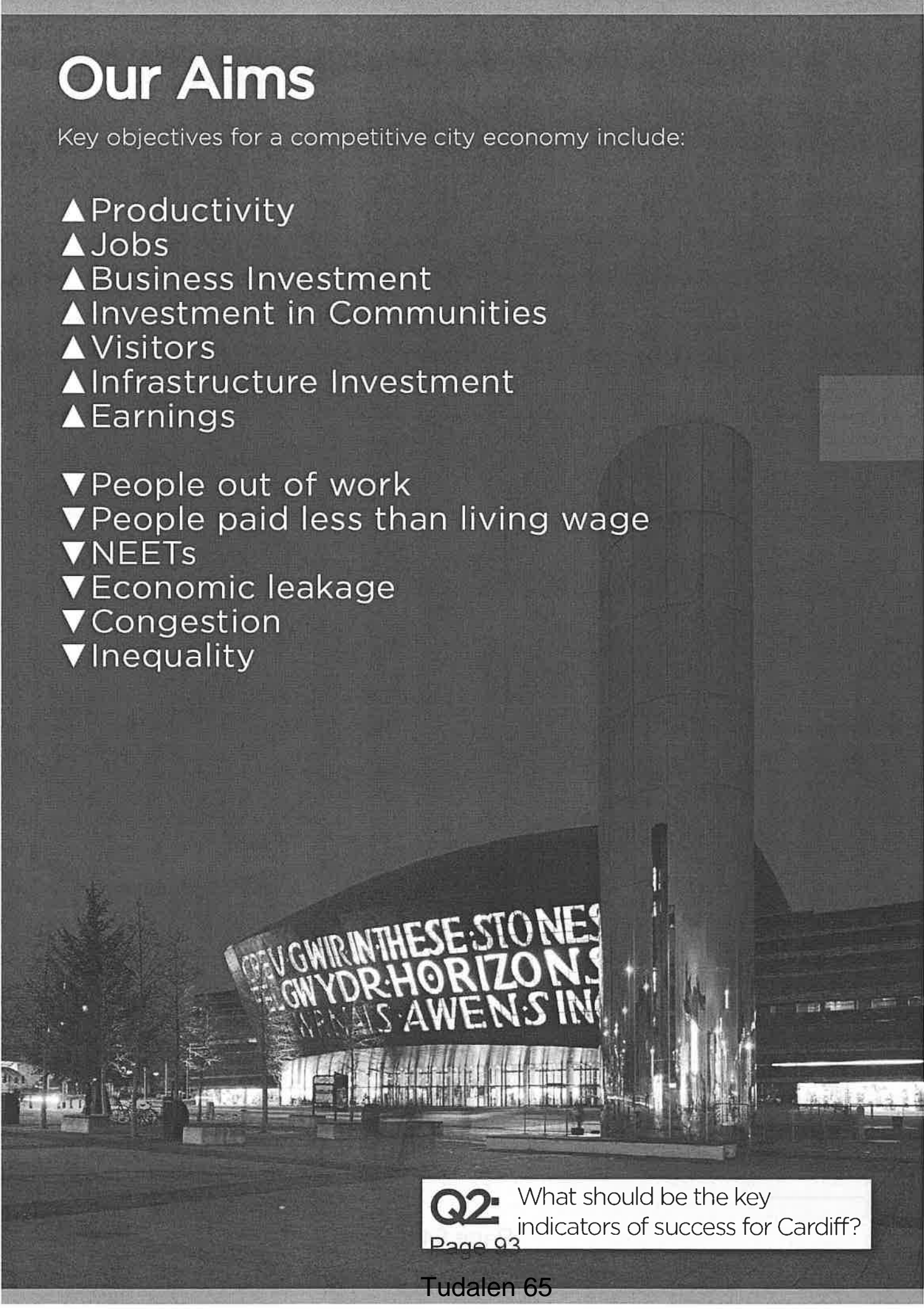
Q1: What are the key issues for the Cardiff economy?

Our Aims

Key objectives for a competitive city economy include:

- ▲ Productivity
- ▲ Jobs
- ▲ Business Investment
- ▲ Investment in Communities
- ▲ Visitors
- ▲ Infrastructure Investment
- ▲ Earnings

- ▼ People out of work
- ▼ People paid less than living wage
- ▼ NEETs
- ▼ Economic leakage
- ▼ Congestion
- ▼ Inequality



CPYD GWIR IN THESE STONES
TEL GWYDR HORIZONS
WELSH AWENS IN

Q2:

What should be the key indicators of success for Cardiff?

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Our Role in the City-Region

Cardiff accounts for a third of the total economic output of the Cardiff Capital Region and around a third of all employment. It is also the focus for employment in high value added service sectors. However, one of the criticisms of Cardiff is that it fails to deliver the 'agglomeration' productivity benefits that it could for Wales due to a lack of density and scale. Subsequently, Welsh cities make the lowest proportional contribution to regional output in comparison with all other UK regions.

The need for competitive cities is backed up by a significant weight of international work. The OECD cites that "The larger the urban agglomeration within a region, the faster the growth the region experienced." It is important, therefore, that Wales can exploit this potential.

"we found no examples of successful regions which had unsuccessful cities at their core"¹

Cities are important for their surrounding regions. They provide a critical mass to drive productivity growth and innovation. They are the focal point of the city-region, connecting within the region but also between cities. They provide a concentration of culture, leisure and sport, and they are the international brand that drives profile. Put simply, people think of cities and not regions as the foundries of the modern economy.

It is essential that city-region spatial planning arrangements recognise the role that the city at its core plays in driving forward the regional and national economy. Any city-region approach must reflect the unique potential and characteristics within its area and not simply seek to spread activity across the region. For too long a 'regional' approach in Wales has done little more than displace activity within the city-region at the expense of the public purse. Whilst a city-region approach is critical to the future of the Cardiff Capital Region, it can only do so if it acknowledges and supports the specific role that Cardiff plays.

Conversely, however, it is important to recognise the role of the wider city-region, which provides space for a greater range and choice for employment and residential purposes. It provides a bigger labour market and a wider skills base. And it provides distinctive urban centres with niche retail/leisure/cultural experiences.

Despite the fact that Cardiff has benefitted from significant private sector investment in recent years, public investment has typically lagged behind. Indeed, whilst there have been many benefits of EU membership, the reality is that funding has been skewed away from the city, with around ten times the amount of support invested in 'convergence' as opposed to 'competitiveness' areas in South East Wales.

In simple terms, Wales needs to develop a greater appreciation of the role of its cities, and put policies in place to exploit them.

Q3: What should Cardiff's role be in the city-region?

¹ Source: *OECD Urban Review*, 2012, 'What do the world's cities do for you?' (Urban Abstract Summary No. 12)

City Comparators

CONNECTED CITIES

Across the globe connectivity is more important than ever. As knowledge has become the main source of productivity growth, the movement of people rather than goods has underpinned competitive cities. This story isn't just about the world's megacities. Smaller cities like Copenhagen, Bilbao and Stuttgart have successfully managed to grow their economy and increase their standing on the world stage.

Transport in Cardiff however is currently dominated by private car journeys. The 2011 census showed that more people travelled to work by car or van than in any other Core City. A relatively small percentage of commuters use buses or trains to get to work. We also know that travel within the city is one of the most topical issues for our citizens. Over 60% of Cardiff citizens feel that travel and transport problems in Cardiff are serious or very serious.

Exemplar cities such as Copenhagen have shown how a step change away from a car dominated city can be achieved based on a shared vision and willingness to change. This is a city not unlike Cardiff. We have a similar size and scale, and we play a similar role in our national economy. Bilbao's story of transformation is equally well-known. However, their story wasn't just about the Guggenheim - it was as much a new metro system that stimulated the regeneration of the city. The Sir Norman Foster led development that opened in 1995 has been part of the city's successful transition from industrial decline to a modern regional capital.

Q5: What can we do to improve connectivity?

BUSINESS CITIES

The UK lags many developed nations in terms of productivity. Whilst London can compete internationally, the UK's other cities and regions drag down the national average. Furthermore, two-thirds of the UK's workforce is employed in businesses with productivity that falls below their industry average, and this has knock-on effects for wages. If we are to make a step change nationally, it is the cities of the UK that need to move up a gear, and in the context of Wales this is even more prevalent.

Cities like Dublin and Helsinki, medium-sized cities comparable to Cardiff have transformed their city and national economies from amongst Europe's poorest, to its most competitive. This has been achieved through strong and decisive leadership, as well as establishing an environment conducive to investment, friendly to business, and underpinned by a skilled workforce.

Dublin led the rapid growth experienced during Ireland's Celtic Tiger boom. The Irish economy grew by almost 10% per year between 1995 and 2000, and then by over 6% per year until the global economic downturn. As well as a competitive offer for businesses, education was an important part of the Dublin story, where a generation of well-educated workers, aligned with international growth sectors, delivered a dramatic shift in city and national economic performance.

The Helsinki story is equally compelling, leading Finland's transition from an agricultural economy to a world-leader in technology. With a focus on R&D, the Finnish capital's reputation at the forefront of the knowledge economy revolution was again led by strong leadership and a focus on skills and education.

Q6: How can we create more and better jobs?

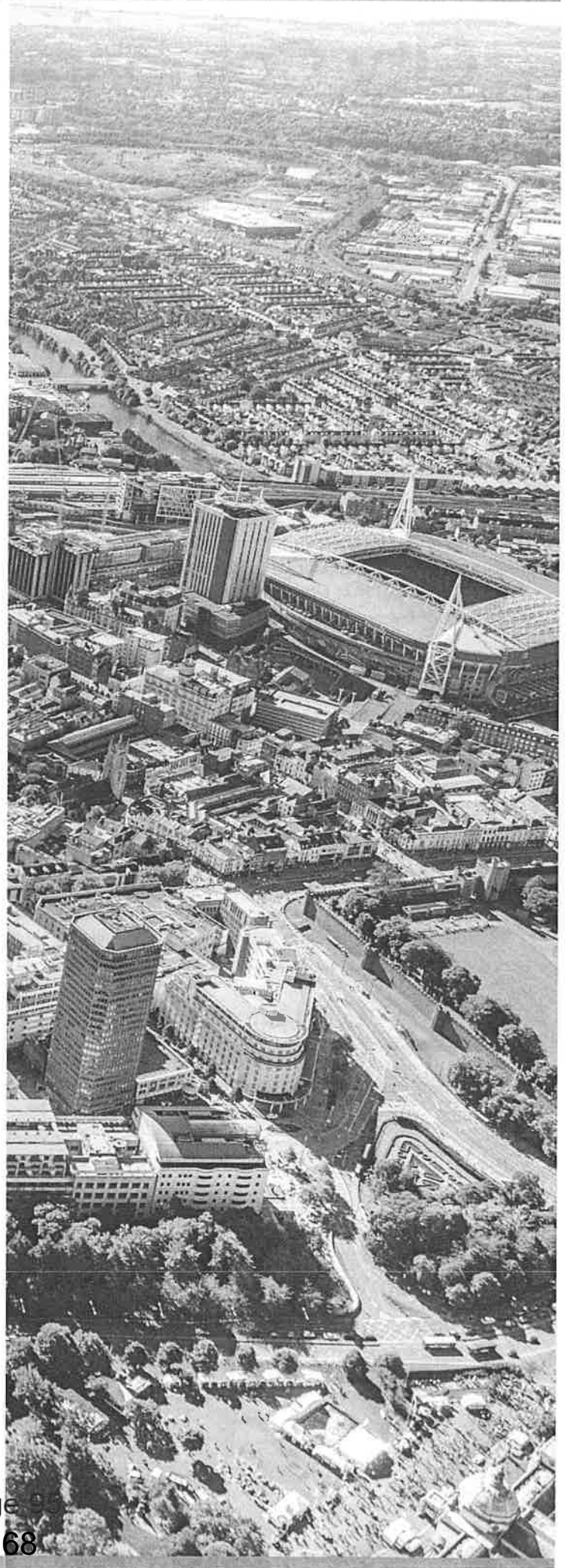
A EUROPEAN CAPITAL

The UK's Core Cities have outlined the important role that cities play in the future success of the UK in a post-Brexit world. But for this to be the case we need to consider our response to Brexit, making sure we capture the opportunities that can accrue - and mitigate for the negative impacts.

We believe we will need to ensure that our businesses remain resilient, that they are not disadvantaged by a lack of access to markets, or that they find themselves in difficulty in recruiting skilled international workers.

We believe we need to make sure that Cardiff does not isolate itself from the world, and continues to show that although we will longer be part of the EU we can still be a proud European Capital. We also need to make sure that we get our fair share of the supposed financial benefits from the repatriation of the UK's contribution to Europe. And we must make sure that Cardiff remains an open and tolerant city.

Q4: How can we continue to engage with Europe in a post-Brexit era?



INCLUSIVE CITIES

Since the 1980s inequality has not improved and is forecast to rise even higher in the coming years. Cities, in particular, have borne the consequences of inequality and there is growing concern at the wider impact of social and economic exclusion. Cardiff performs well in comparison with Core Cities and other parts of Wales across a range of factors which can affect a resident's wellbeing. However, as with other cities in the UK, significant and entrenched inequalities persist. Despite being the nation's commercial engine, over 60,000 people in Cardiff live in the 10% most deprived communities in Wales. Only two other local authorities in Wales - Merthyr Tydfil and Blaenau Gwent - have a higher percentage of their population living in the poorest communities. Almost a third of Cardiff households live in poverty, with a high percentage of children living in workless and low income households.

Lille-Roubaix have adopted an area-based policy to deal with infrastructure investment, making sure that it links economic inclusion activities in areas such as housing, education and training. The effectiveness of this approach is supported by including residents in the design and implementation of investment projects. It has also co-ordinated local initiatives to make sure there is a wider impact on local communities.

Pittsburgh successfully transitioned, like Cardiff, from an industrial to a service economy but its economic recovery was not felt by everyone. One area that suffered in particular was the Hill District, whose decline can be traced back to the 1960s when residents were displaced by big construction projects. Located between major employment zones in the city centre, residents were disconnected from the employment opportunities these zones delivered. The Pittsburgh Central Keystone Innovation Zone (PCKIZ) initiative sought to address this by linking local residents with the local high tech growth, providing direct support to link businesses in the area with the city's high tech clusters.

Q7: How can everyone benefit from growth?

SMART CITIES

Smart cities use technology and/or data to improve how we use our cities, and how we deliver public services. Done well, a city with the right smart city infrastructure will become both a more competitive place to do business and a better place to live. Being a smart city doesn't just mean a digital response to every problem, it means an informed, intelligent response to problems.

Barcelona is an active smart city, with over 100 live projects, including smart traffic lights, telecare services and electric cars. Its leading role in the use of Internet of Things means that the supply and demand for services can be more closely aligned, so that limited resources can be used where they have the biggest impact, and that excess resources can be diverted to more productive areas. This approach includes streetlamps that only operate when someone is nearby, a telecare system that proactively monitors over 70,000 elderly and disabled people in the city, rain monitors that determine when to water the city's parks, and municipal bins are only emptied when sensors note they are full.

Rotterdam meanwhile is producing a model to simulate scenarios for city planning and management. The model will help to improve investment decisions for the city government, whether in terms of the impact on transport, or the environmental impact of capital investment.

Q8: How can we become a smarter city?

Spatial Strategy

We want your views on developing a spatial strategy for the city...

Cardiff is undergoing a period of rapid growth. The effective management of that growth will be essential to provide clarity to the market and to ensure the city continues to function effectively.

Whilst development is becoming increasingly mixed use in nature, our intention is to concentrate investment, building on the city's recent successes, to achieve critical mass and to realise agglomeration effects.

Proposed areas for the spatial strategy could include:

The **CITY CENTRE** is already the most important business cluster in the region. It is increasingly a place to live as well as work. Our intention is to encourage the continued expansion of the city centre southwards beyond the railway lines through office-led mixed use development.

CARDIFF BAY has already experienced a comprehensive transformation. It now needs a second push. We want the Bay to become a leading short break destination which will require further investment in leisure-led infrastructure.

NORTH CARDIFF is home to the city's knowledge institutions and some of the most R&D intensive businesses in the city. Both Cardiff University and Cardiff Met are investing in new facilities that will expand their footprint in the city. The Heath Hospital site and the knowledge cluster around Coryton offer opportunities for further growth.

EAST CARDIFF, south of the railway line, is an existing industrial centre primed for expansion. Benefitting from a range of high quality infrastructure, including the Port of Cardiff and the Euro Freight Railway Terminal, the area has significant potential to deliver more manufacturing, distribution and trade related jobs.

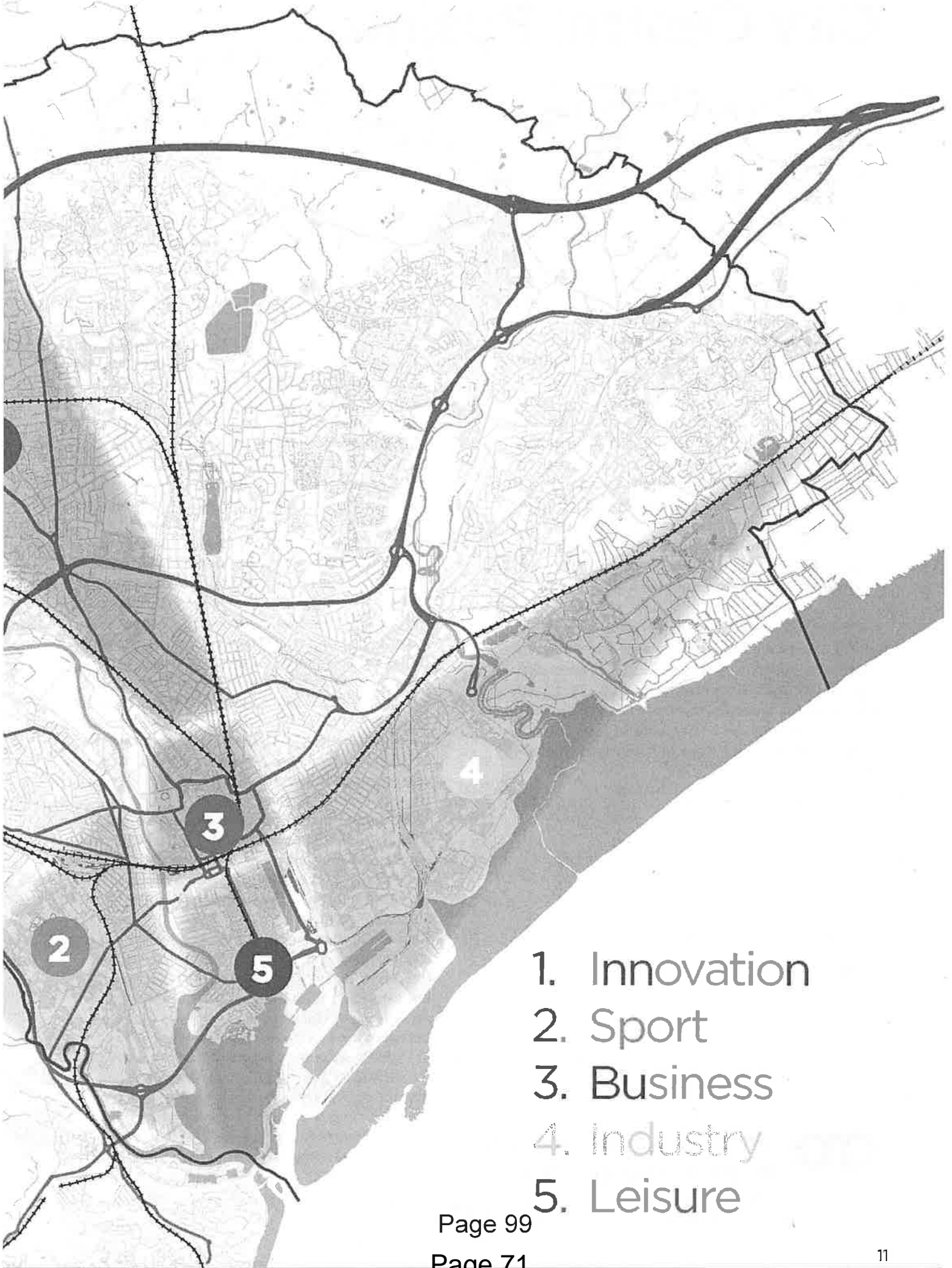
WEST CARDIFF already accommodates some of the city's premier sporting and recreational facilities. There is potential to build on the success of the new Cardiff City Stadium and House of Sport development to provide a cluster of sporting infrastructure for the benefit of elite sport and for local community use.



Q9:

What should Cardiff's spatial strategy be?

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- 1. Innovation
- 2. Sport
- 3. Business
- 4. Industry
- 5. Leisure

City Centre: Business

The city-centre plays a key role in any city, providing a focal point for employment and entertainment, as well as a connecting point to the city-region and wider world. Over the last two decades Cardiff's city-centre has been transformed. Unlike in competitor cities, where large developments have taken place on out-of-town green-field sites, in Cardiff major city projects such as the Millennium Stadium and the St David's shopping centre have been developed as part of, not separated from, the city-centre. These have built on assets such as Cardiff Castle, existing and new university developments and a programme of pedestrianisation to create a vibrant and successful city-centre.

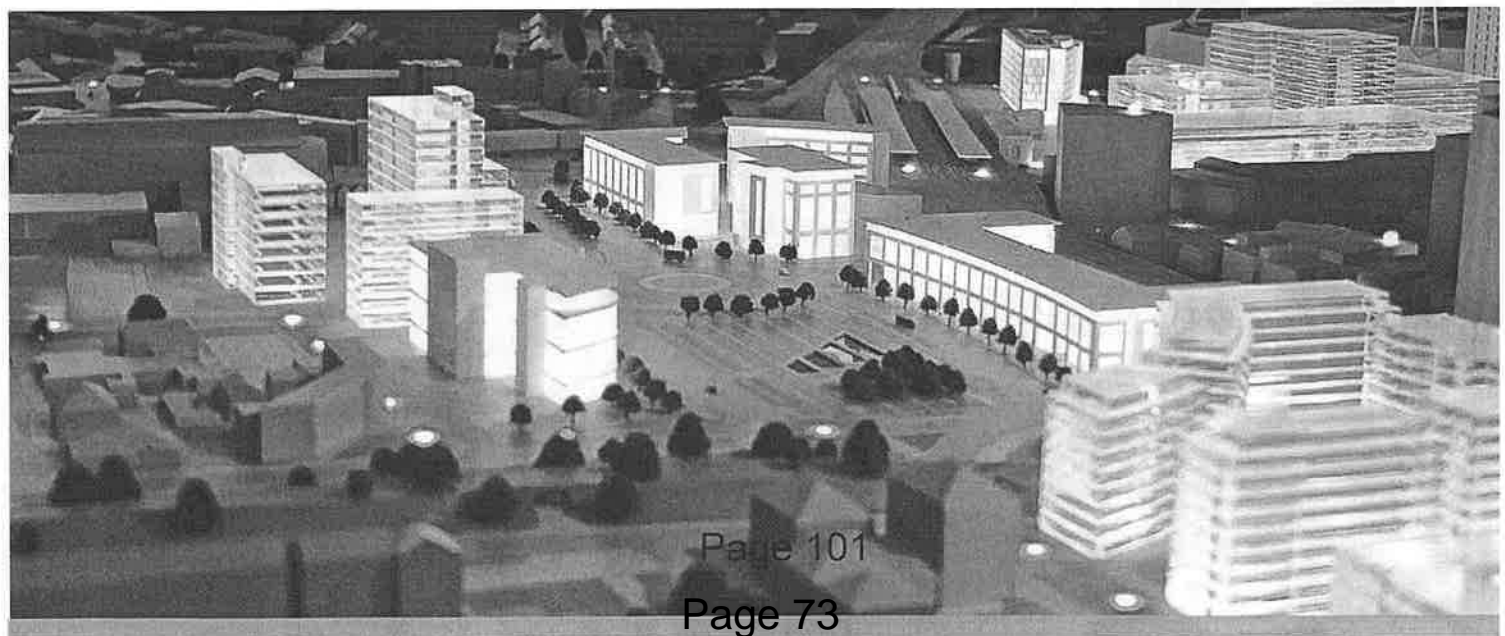
The next phase of the city centre's development has begun, with the Central Square development creating a place for business that can compete with the best in the UK. No other location has the ability to create as many jobs and opportunities as the areas surrounding Central Station, and no other location has the opportunity to be better connected with the city, the city's communities, the city-region and the rest of Wales and the UK.

We must also build on the strengths of our city centre as a place to visit. However the threat to retail from technology is real, and it is essential we ensure that the city centre remains a place people want to visit. Investment in our city centre will also help provide a range and choice of jobs, jobs for people with different skills, different abilities and different interests.

Give us your views on our suggested priorities for the City Centre:

- The modernisation of Central Station sits at the heart of the Council's plans for the expansion of Cardiff city centre. Working with UK Government, Welsh Government and the private sector, we intend to bring forward proposals to increase the capacity of Central Station for trains and passengers and to transform Cardiff Central into a modern gateway befitting of a capital city.
- We are committed to continuing the regeneration of the area immediately surrounding the station to deliver the city's primary office destination.
- Central Square is well underway and when complete will deliver over 1 million square feet of Grade A* office accommodation. A new bus station will be delivered, and proposals are starting to be progressed that will spread the benefit into surrounding areas such as Westgate Street and St Mary Street.
- New plans are emerging for the regeneration of the riverfront land south of Cardiff Central. Agreements are now in place between land owners to relocate Brains Brewery to make way for a major mixed use office-led development including significant new transport facilities linked to the improvement of Central Station.
- Making the most of the city's river frontage is a key part of the Council's vision and an important factor in the Council working to secure land at Dumballs Road. At 40 acres the site offers the opportunity to deliver a new residential-led mixed use urban centre within walking distance of all of the city centre facilities.
- The completion of Callaghan Square, extending the office district towards Capital Quarter, is a key priority. This will involve the intensification of development, with high quality design and new public spaces and could include a new public sector office quarter.
- Capital Quarter is one of the city's recent success stories. Linking directly into Callaghan Square, the development is progressing at pace and will extend the city's new office quarter whilst providing new facilities that improve the link between the city centre and the Bay.
- St David's Square - following the relocation of the Indoor Arena, a new office-led mixed use quarter could be created adjacent to the Admiral HQ, providing the opportunity for significant new city centre public spaces and leading to the improvement of adjacent city centre streets including Charles Street, Barrack Lane, Churchill Way and Station Terrace.

Q10: What can we do to support business development in the city centre?



Cardiff Bay: Leisure

The last 30 years has seen a transformation of Cardiff Bay, regenerating over 1,000 hectares of derelict land and creating over 30,000 jobs. Projects such as the Wales Millennium Centre, Mermaid Quay and Roath Basin have created a new place to visit and do business. Walking, running and cycling have seen the barrage become a venue in itself and Roald Dahl Plas has become the go-to place for city celebrations.

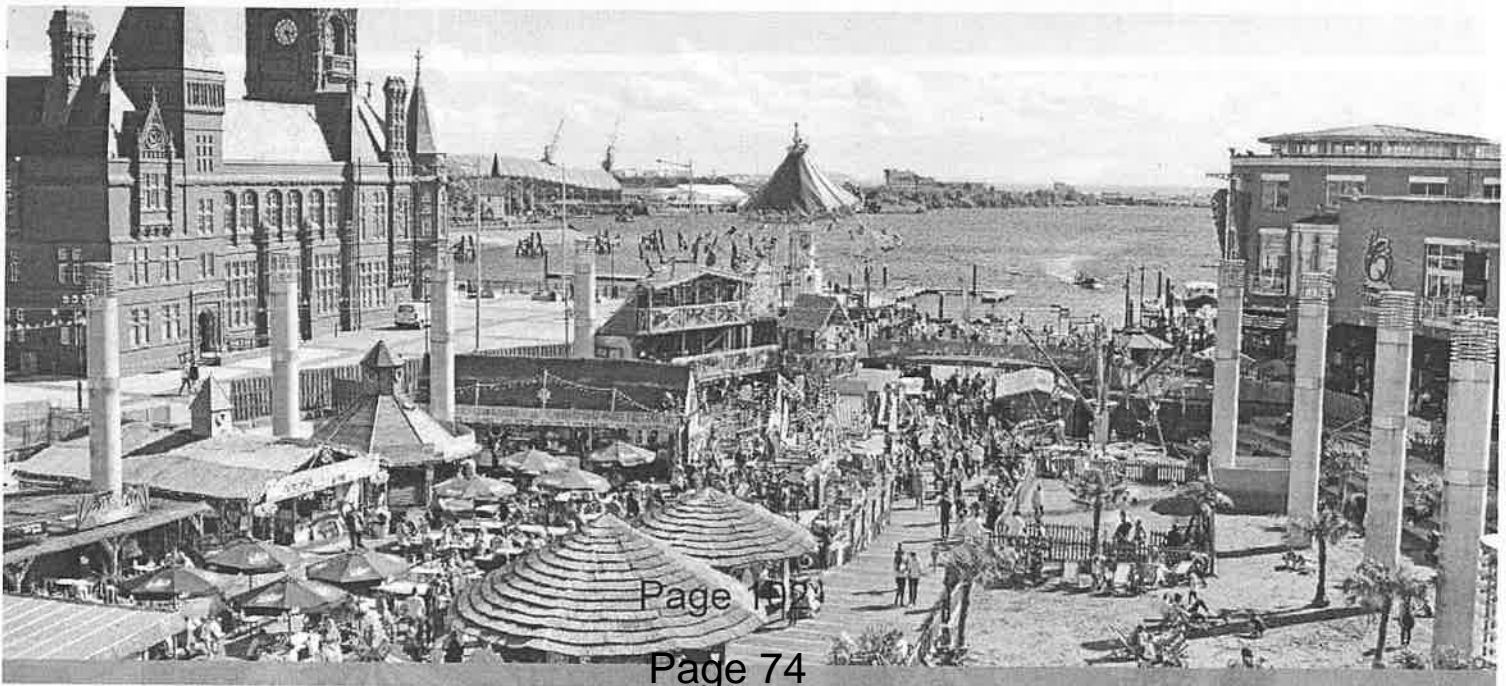
However, as the city centre has thrived in recent years, buoyed by investment, the Bay has lost some of its momentum. It is now ready for the next phase of its development.

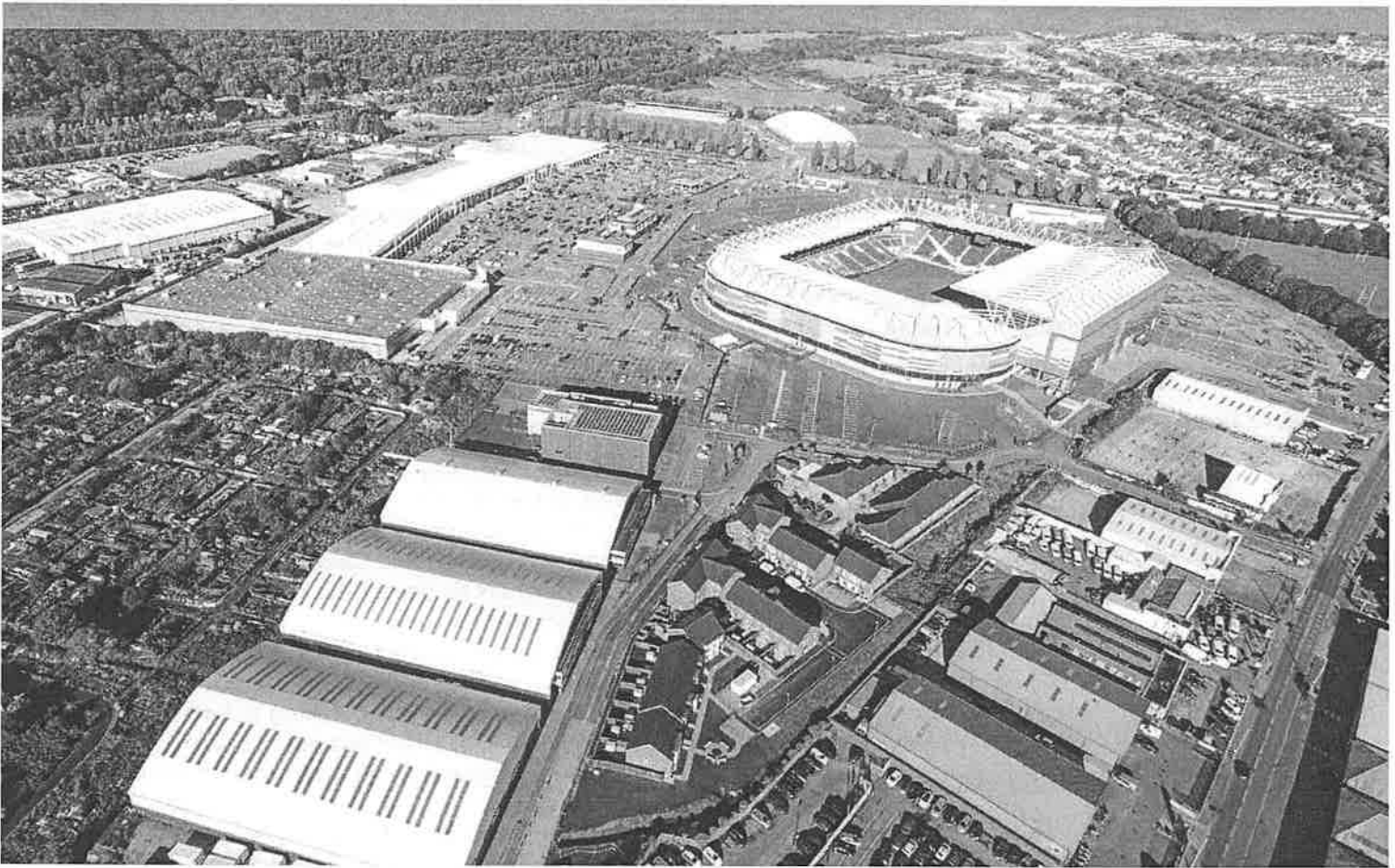
Cardiff Bay is already one of Wales' most visited locations. It now needs to become a primary UK weekend city break destination. This will require significant investment in leisure infrastructure. It will also require major improvements to the connectivity between the city-centre and the Bay across all modes of transport.

Q1: What can we do to support leisure activities in the Bay?

Give us your views on our suggested priorities for Cardiff Bay:

- A new Multi-Purpose Arena will attract business and academic events and stimulate high spending business tourism, raising the profile of the city as a business location. Building on the success of the Wales Millennium Centre it will enable a broader range of events, significantly higher footfall and a spread of events that will support business to thrive in Cardiff Bay.
- The redevelopment of the Coal Exchange will reinvigorate Mount Stuart Square. Building on this investment we will bring forward a scheme to support its development as a vibrant district for small business.
- We will explore the delivery of a new family attraction to draw visitors to the Bay throughout the year.
- We will work with partners to explore options for a new attraction at the Graving Docks, including the potential for a contemporary art gallery, a science experience venue, and a new venue for the Cardiff Story.
- Whilst it's less than a mile in distance, relatively low numbers of people consider walking as a way of getting between the city centre and the Bay. A 'High Line' development will create a more attractive route into the Bay, as well as being a destination in itself.
- A new leisure transit system linking the city-centre to the Bay must remain an important priority and ambition for Cardiff, supported by improved walking and cycling routes as part of the development of a 'Bay Loop'.





Cardiff West: Sport

Cardiff has developed a deserved reputation as a sporting and cultural Capital City. From the Champions League to local park-runs, sport has an impact on all aspects of city life. Investment in sporting infrastructure has focussed on the west of the city, and opportunities remain to build on this to cement the city's position not only as a place where major sporting events take place, but also one with world class facilities for use by elite athletes through to those in the local community.

We will continue to invest in the city's sporting infrastructure, focusing on the west of the city, around the new Cardiff City Stadium, the House of Sport developments and the International Sports Village.

Q12

What can we do to develop Cardiff West as a sporting destination?

Give us your views on our suggested priorities for Cardiff West:

- We will work with Glamorgan Cricket Club to enhance their facilities, separating the sporting and conference infrastructure so that cricketing and commercial activity can take place all year round.
- We will explore the potential for a new stadium for the Cardiff Blues.
- We will take forward the next stage of development for the International Sports Village, securing new investment. In doing so we will create Wales' foremost location for sport, leisure and recreation in the heart of a city.
- The completion of the House of Sport development will ensure Cardiff has some of the best community sports facilities in the UK.
- This will link with further development of the Athletic Stadium sports cluster, providing more space for community sports development.
- We will take forward plans for a redeveloped home for Sport Wales to cement its position as the home of sport in Wales, improving facilities and site access.

Cardiff East: Industry

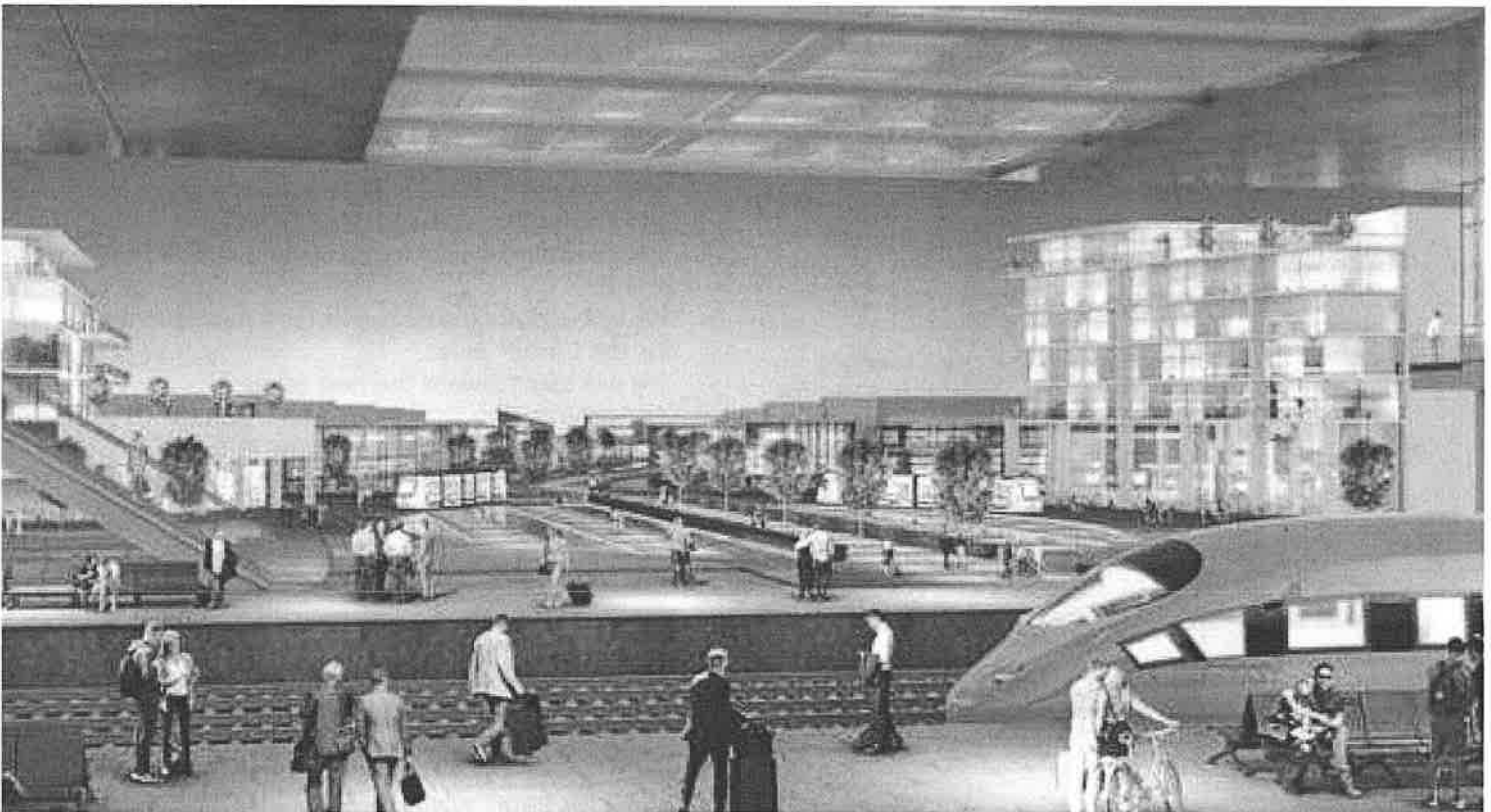
Supporting the development of a new industrial zone in the east of the city will open new opportunities for those that live there, and improve access to other opportunities across the city and beyond. For too long the east of the city and its communities have not benefitted from the city's transformation.

An Eastern Industrial Zone will also provide a greater range and choice of employment land for Cardiff. We also know that we can't just rely on city centre opportunities for residents of Cardiff. The different options and choices that can be established by providing lower density employment opportunities will help those whose skills or experience may not match those found in a service focussed city-centre.

Q13: What opportunities are there to support industry in Cardiff East?

Give us your views on our suggested priorities for Cardiff East:

- Industrial Strategy for East Cardiff : We will develop a new industrial strategy to deliver new jobs and provide a range of opportunities for people in the east of the city and beyond.
- A Cardiff Parkway: A new railway station in the east of the city will open up new opportunities for residents and business.
- The Eastern Bay Link: Cardiff Council will work with partners to deliver the full completion of the Eastern Bay Link.
- A new Business Park for the East: Cardiff Parkway offers a unique opportunity for prospective companies looking to invest in the UK. A new 100,000m² business park will add an extra dimension to the Cardiff offer in terms of office supply.
- Eastern Distribution Centre: Investment in the road infrastructure, linking with the M4, will open up new opportunities for distribution. Market demand for facilities is on the rise across the UK, and it is important that Cardiff can capture any investment taking place to make sure that the people of our city benefit.



Cardiff North: Innovation

Cardiff's greatest opportunity lies in the talent, attitude and industry of its people. The city's universities, in particular, have been fundamental to making Cardiff one of the most highly-skilled cities in the UK, providing a conveyor belt of talent in to the city economy. They are also a source of invention and creativity in the sciences, the arts and in business, and so need to become central to the city's ambitions in the way that they haven't been in the past.

In developing a Northern Knowledge Quarter we will provide a focal point for innovation in the city, building on the success of our universities.

Give us your views on our suggested priorities for the Cardiff North:

- **A New Innovation Campus:** We share Cardiff University's ambition to establish itself as one of the top 100 global universities and will work in partnership with the University to deliver the new Science and Innovation Campus. We will work with partners to develop a new Innovation Park covering Maindy Park and the Heath Hospital with Cardiff University and Cardiff and Vale University Health Board.
- **M4 Science Park:** We will work to develop a new science park at Coryton to support new advanced technology businesses, located near the junction of the M4 and A470 - creating potentially Wales' most accessible site.
- **Cardiff's Circle Line:** To complement the Science Park development we will also explore ways of completing the loop of the 'City Line' - creating a new Circle Line for Cardiff to provide regular and fast links between city communities.
- **North West Link:** We will improve access through the North West of the city to reduce the pressures on the transport system and to improve links with the rest of Cardiff.

Q14: What opportunities are there to support innovation in North Cardiff?



Major Events

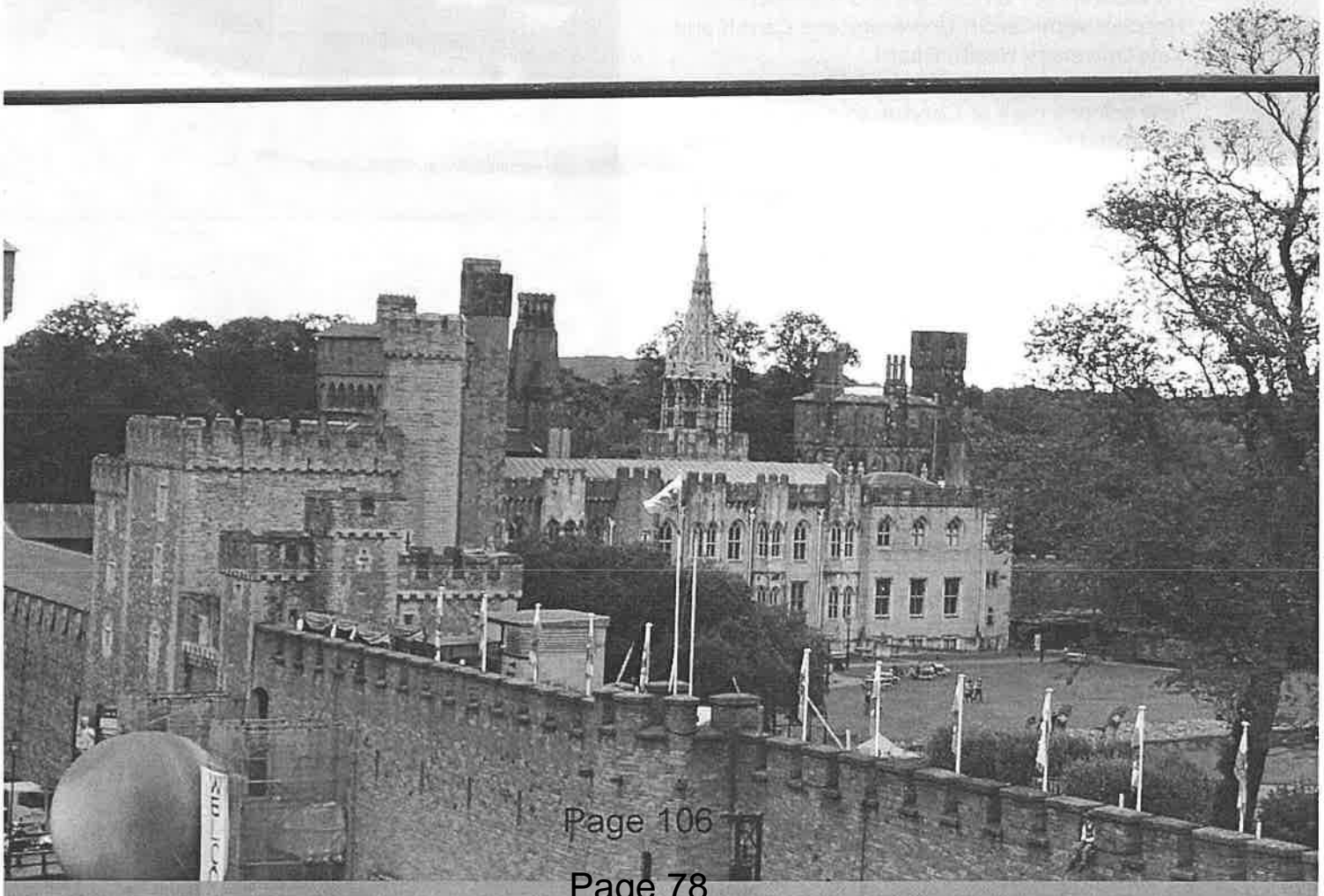
One of the major factors behind Cardiff's ability to attract and retain talent is the city's leisure and cultural offer. As a capital city Cardiff is home to major international sporting and cultural events, made possible by some of Europe's best cultural and sporting infrastructure. This will be further enhanced through the development of a new Multi-purpose Arena in the city-centre.

We are committed to continuing to deliver a programme of major international sporting and cultural events. Events aren't just about attracting new people to the city however, they are also about bringing new ideas and experiences to the people who already live here. Local festivals like Sŵn, Diffusion and Cardiff Contemporary and events such as the Roald Dahl 'City of the Unexpected' have given something new to the city, and we need to build on their success.

Give us your views on our suggested priorities for the Major Events:

- Major Events: We will work with Welsh Government the Business Improvement District and other partners to develop a new programme of major events, building on the success of the Champions League.
- Wales' cultural heart: We will work with partners to develop a programme of home grown events and festivals to create a year long series of events that not only drives tourism, but delivers for the people of Cardiff.
- Womanby Street: We will secure the future of live music in Womanby Street by working with the city's business and arts communities, investing in the street itself and delivering a music strategy for Cardiff.

Q15: How should we use events to support the city's economy?



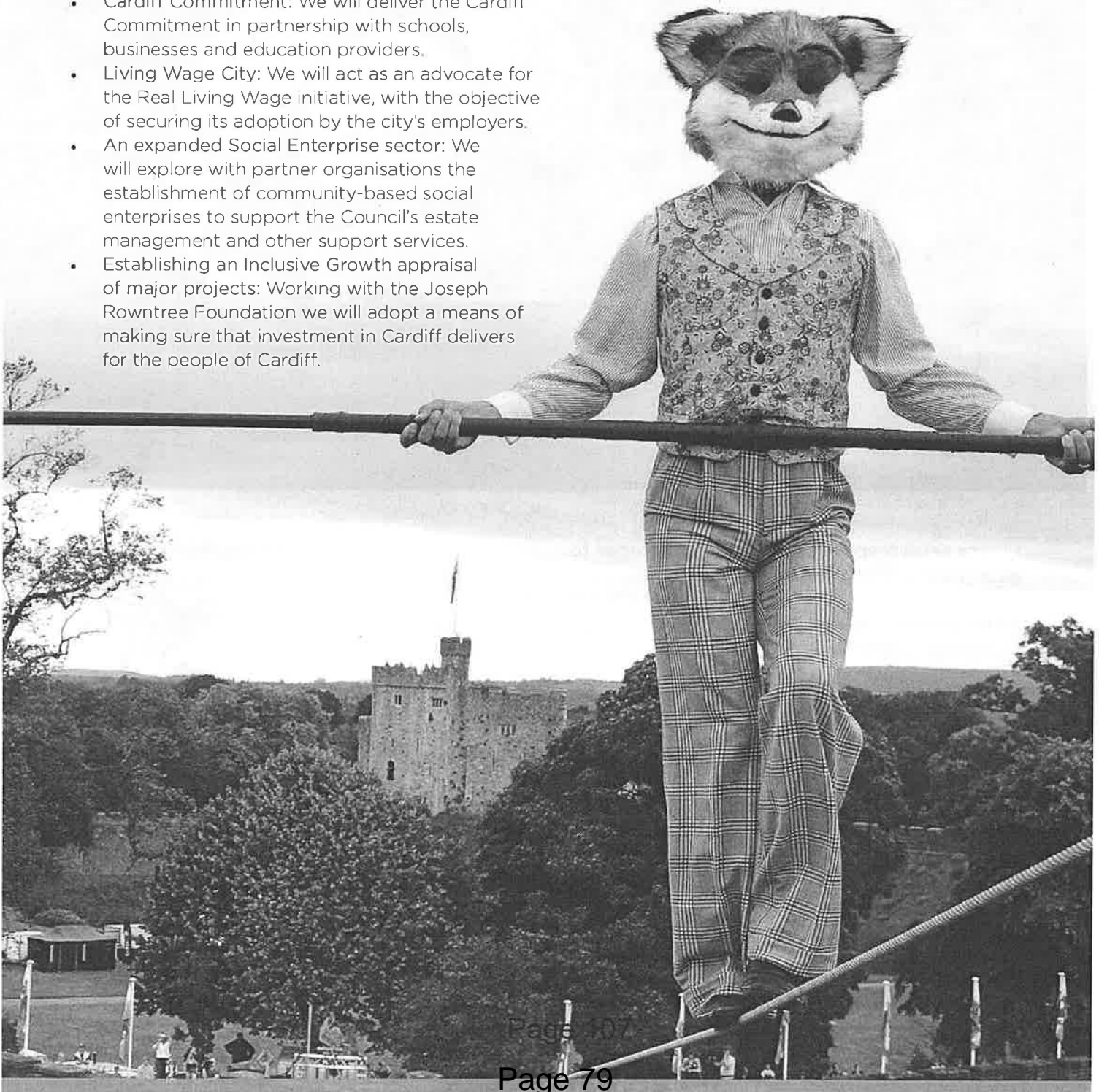
Inclusive Capital

Whilst jobs growth in itself is a positive, we want to move one step beyond this and make sure that the proceeds of growth are enjoyed by the many, not the few, in Cardiff. In responding to this we will adopt new means of assessing projects to understand how they will deliver opportunities for everyone.

Q16: How can we make sure everyone benefits from growth in Cardiff?

Give us your views on our suggested priorities for Cardiff to become a more Inclusive Capital:

- Cardiff Commitment: We will deliver the Cardiff Commitment in partnership with schools, businesses and education providers.
- Living Wage City: We will act as an advocate for the Real Living Wage initiative, with the objective of securing its adoption by the city's employers.
- An expanded Social Enterprise sector: We will explore with partner organisations the establishment of community-based social enterprises to support the Council's estate management and other support services.
- Establishing an Inclusive Growth appraisal of major projects: Working with the Joseph Rowntree Foundation we will adopt a means of making sure that investment in Cardiff delivers for the people of Cardiff.





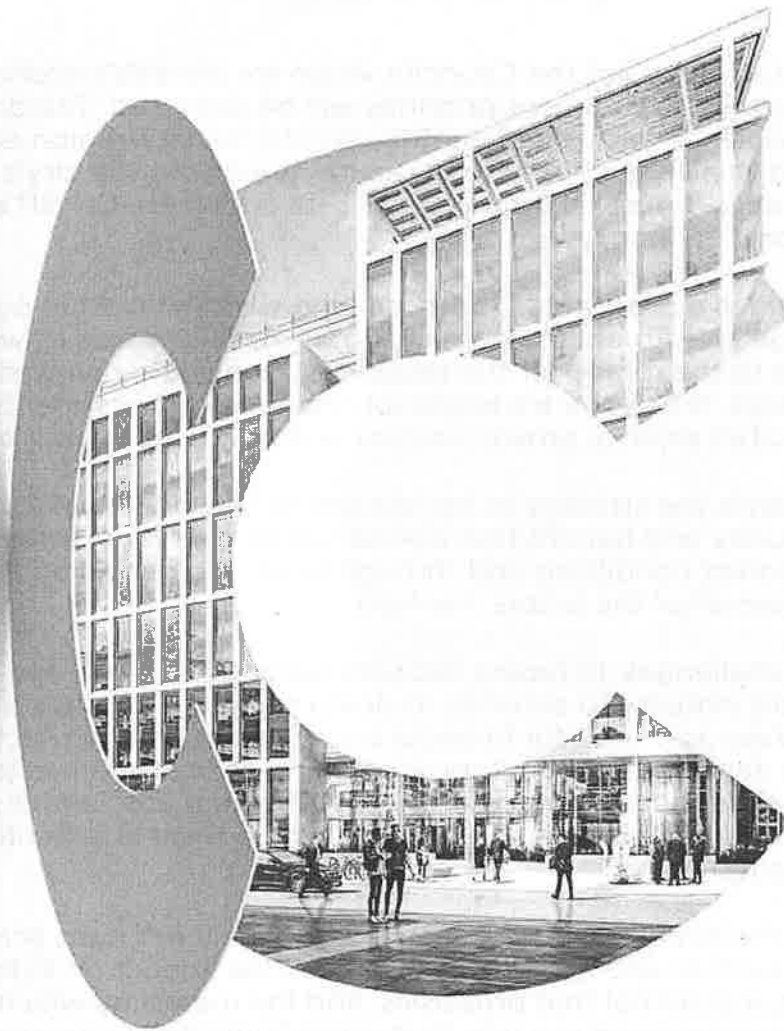
Please send responses to this Green Paper to:
econgreenpaper@cardiff.gov.uk

Alternatively you can write to:
Economic Green Paper
Economic Development Team
Cardiff Council
County Hall
CF10 4UW



Appendix 3

Building More and Better Jobs



Draft

Economic Strategy

Foreword

Cllr Russell Goodway



This Economic Strategy sets out the Council's vision for the city's economy and establishes how the key development priorities will be delivered. The document considers Cardiff's position within and contribution to the city-region economy, the Welsh economy and the UK economy. In particular, it sets out the city's initial response to the UK Government's Industrial Strategy and sets out where Cardiff sees itself in the context of the national economy.

The document provides a prospectus for those who wish to invest in our city. Critically, it seeks to encourage investment from small and micro businesses as well as major investors. It outlines to the retailer or the restaurant owner where investment is expected to take place. It tells the tradesperson the type of investments anticipated. And it outlines the city's priority growth sectors and how support will be coalesced.

The Council also wishes the strategy to be relevant to the individual. Our intention is to deliver opportunity and benefit that can be felt by everyone, through better understanding of market conditions and through improved partnership and collaboration between all of the actors involved.

Cardiff faces many challenges. In recent decades successful cities have transformed their economies from industry to services. In doing so, many of these cities have established themselves as a base for financial services and creative sectors. The challenge now is to develop these sectors, identifying specialist areas to deliver more productive growth and ultimately wage increases. This requires Cardiff to understand where there is potential for job growth - but also where there is potential to develop what we are really good at in Cardiff.

It is important that the benefits of growth are more widely felt right across our communities. Data such as unemployment can mask the impact on individuals and communities, and it is essential that proposals, and the means by which we deal with our investments, are considered in a way that doesn't just drive city-level indicators, but feeds through to the people of Cardiff. Doing this is not always easy, and requires alignment of partners across the city.

Ultimately this document is a starting point. Issues such as Brexit have shown that the rules of the game can change suddenly for local economies. We need to make sure that we can be flexible in how we respond to these challenges, and take advantage of the subsequent opportunities.

In taking forward our strategy we will work with our partners, but also the people of Cardiff and the city-region to deliver more and better jobs for all.

Consultation

A consultation exercise was undertaken in early 2018 following the publication of a Green Paper. The survey was promoted through local media and social media and a number of engagement events took place in Cardiff and London. The consultation also targeted specific representative groups to ensure a broad coverage of Cardiff's businesses and communities, as well as across the city-region. Responses were received from representatives of business, education, the third sector, sport, arts and culture and local government.

On the whole the response to the Green Paper was very positive. Generally respondents supported the content, both strategically and the project proposals. However, a number of issues arose that were identified as either omitted, or requiring additional consideration.

The issue of transport and connectivity was a theme through many of the responses, with transport improvements seen as a way of supporting the development of business, whilst also making jobs more accessible for all. The need to support the development of business outside of the city centre was also highlighted, reflecting a desire for thriving and sustainable district centres. In terms of growth opportunities, the need for Cardiff to progress beyond being a service centre was highlighted, with a focus on the need to develop competitive clusters that can deliver improvements in productivity. The creative sector and 'Fin-Tech' were two cited examples where the city is seen as having considerable potential.

The need for greater emphasis on inclusive growth was a re-occurring theme and consideration of how the economic strategy could benefit all groups in Cardiff. It was noted, for example, that employment rates for disabled people, transgender people, some BAME people, and Muslim women are lower than average. There was clear support for the idea that everyone in Cardiff needs to benefit from its development. The support for inclusive growth ties in with the importance of building a skilled workforce that can take advantage of new jobs, connecting people with businesses. Overall consideration of wellbeing was a further issue raised, noting that jobs and growth by themselves were not the sole determinant of city residents' quality of life.

This document seeks to reflect the consultation responses. Whilst transportation is a major consideration in the development of any economy, the city's strategy for transport will be considered by a separate Transport Strategy.

Our Strategy

Recent decades have seen Cardiff successfully reinvent itself as a centre for service sector business activity. The city economy now needs to step up to the next level, to become more productive, and to provide better jobs for the people of the city and the city-region.

Cardiff is a well skilled and well positioned city to take this step. It requires the city to understand and communicate what it is good at and co-ordinate activity between business and government to develop a more productive and innovative business base.

Cardiff also has a responsibility as the Capital, to deliver for Wales. Welsh cities contribute less to their nation's economy than anywhere else in the UK - despite being the natural poles for growth. It is clear that if the Welsh economy is to thrive it must look to its cities to lead the way. Whilst Cardiff has the building blocks for a competitive economy, productivity still lags behind many of the UK's leading cities.

And as the gateway to Wales' visitor economy we need to make sure that Cardiff's growth in tourism continues, and that it shares the benefits of this growth across the city-region.

Critically, over the next ten years we will commit to delivering for Wales. To do this we will:

- Generate 20,000 additional jobs for the city-region
- Create Wales' first significant commercial business cluster in Central Square, Central Quay and Callaghan Square
- Establish Cardiff Bay as a leading UK urban visitor destination in its own right
- Put Cardiff at the heart of the UK's Creative and Digital sector
- Position Cardiff as a national centre for 'Reg-Tech' as part of its fin-tech and cyber security cluster
- Strengthen the Cardiff city-region's place as the focal point for advanced manufacturing in Wales, focussing on compound semi-conductors and life sciences
- Support our city's communities and districts to take advantage of the city's growth
- Establish stronger city-region governance that delivers for Wales

Underpinning this is the need to ensure that we have the support in place to deliver our ambitions. This means the transport links, the digital infrastructure, and fundamentally it means equipping our workforce with the skills to drive innovation and productivity in Cardiff. To do this we will make sure that our economic strategy is considered not just from the economic development perspective, but also in terms of skills and how we get around the city.

Cardiff's economy doesn't exist in isolation. In a post Brexit world it will be essential to understand how the city can contribute to the global, national, regional and local economies. At the heart of this is understanding how Cardiff can contribute to the UK Industrial Strategy.

Our Strategy is set out in three parts - the key spatial priorities, key Industrial Strategy priorities, and the underpinning themes to support the strategy.

The **Spatial Strategy** aims to inform investors, both inward and local, of areas where concentrations of activity will take place in Cardiff. It will provide clarity about the city's vision for these areas that will help investors to understand where we will focus on different types of investment.

The **Industrial Strategy** will highlight the sectors that offer the opportunity for productivity growth in Cardiff, and will not only provide a focus for investment around these sectors but aims to influence how areas such as skills can support the city's growth agenda. It also highlights how Cardiff can contribute to the UK's Industrial Strategy.

Supporting these strategies will be the **Underpinning Themes**, which highlights how the city's development will support its residents, communities and businesses.

Cardiff Today

The city's economy has all the tools to become a UK leader...

...we have a skilled workforce, half of which is qualified to NVQ level 4 or higher – better than all but one of the UK's core cities....

...we are growing faster than any other UK city...

...we have some of the best universities in the UK and a massive student population...

...we have some of the UK's most innovative creative, digital and fin-tech businesses...

...we have world-class sporting and cultural venues...

...we regularly top the table in measures of quality of life...

However...

...we lag some UK cities in terms of productivity...

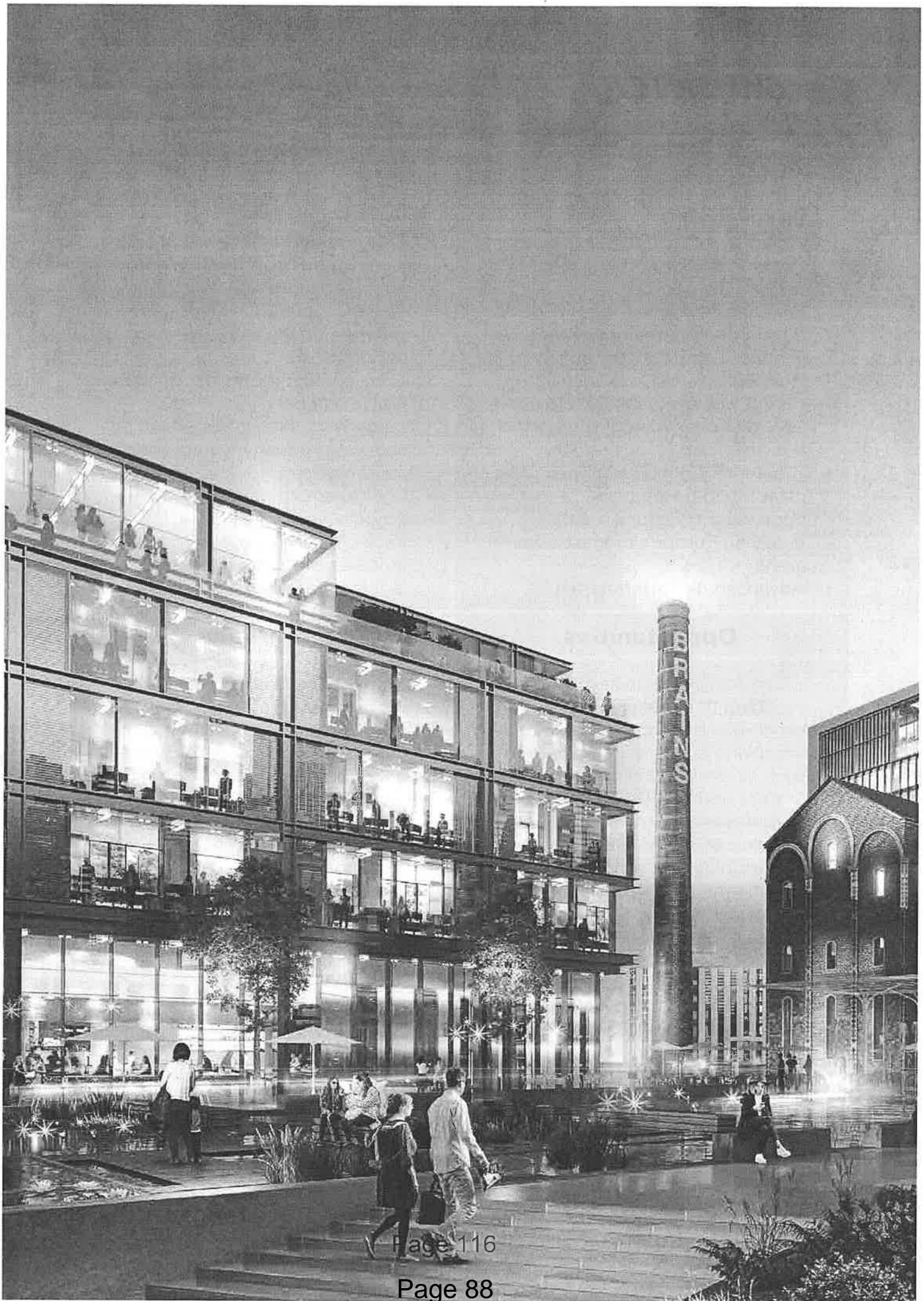
...as the biggest Welsh city, we have more people living in poverty than any other Welsh local authority area...

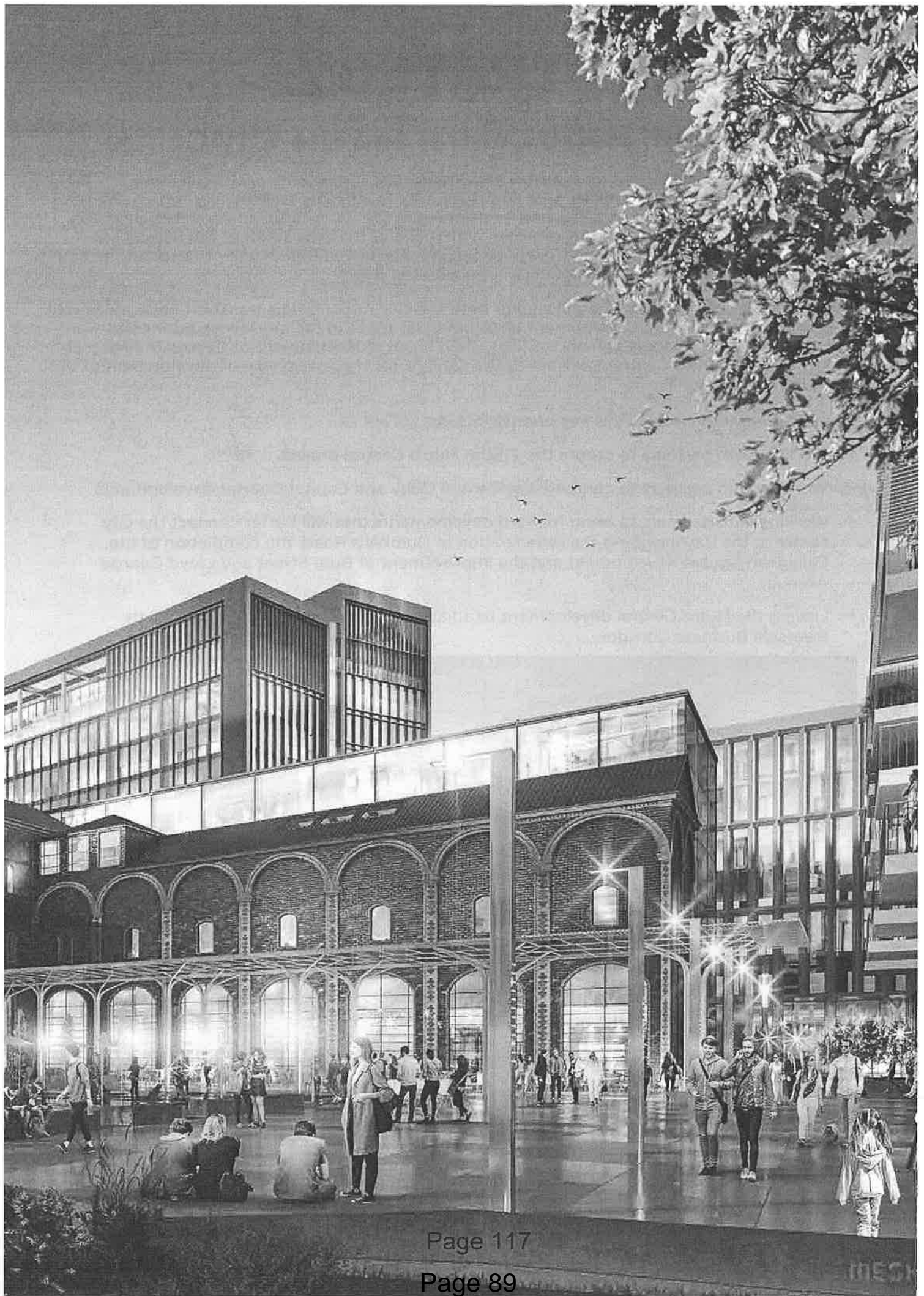
...income disparities persist within the city...

Cardiff needs to find another gear. The city has successfully transitioned to become a modern service focussed economy. It now needs to become a highly productive economy that shares its spoils more broadly across communities.

Cardiff SWOT

Strengths	Weaknesses
<ul style="list-style-type: none"> • Capital City status - driver of the Welsh economy • Fast growing and dynamic economy - proven ability to create jobs in competitive sectors • Well qualified workforce - 40% qualified to degree or equivalent • Number 1 in the UK for quality of life • World-class university research - Cardiff University ranked 6th in the UK - and over 70,000 students in the city • Greater city-region alignment and established governance • Sporting and cultural assets - including Europe's biggest covered arena • Advanced digital infrastructure 	<ul style="list-style-type: none"> • Relatively low levels of productivity - which in turn affects earnings • Low numbers of HQ operations - impacting on innovation and competitiveness • Like most other UK cities, growing pressure on the city's transport infrastructure • Capacity to improve the level of visitor numbers • Large wage disparities - need to support productivity improvement for everyone • Poor international connectivity - physical and digital • Lack of urban policy agenda in Wales - reduces impact of 'agglomeration'
Opportunities	Threats
<ul style="list-style-type: none"> • Scope for growth in key sectors including financial and business services and the creative sector • Improving business infrastructure such as the world-class BBC Drama Studios and Bad Wolf Studios in Cardiff Bay • Growing economy brings opportunities for wider markets • Investment in Metro will unite the city-region and provide improved access to a larger workforce • Visitor economy growing faster than any other UK city • Potential to exploit benefits from Brexit such as removal of Structural Funds boundaries 	<ul style="list-style-type: none"> • Competition from other UK cities for mobile investment • Competition from other UK cities for mobile workforce - businesses are reliant on maintaining a skilled workforce • Pressures of population growth will impact on infrastructure • Need to maintain and promote the 'Cardiff' brand in an increasingly competitive marketplace • Impact of Brexit on ability to attract and retain skilled workers • Need to keep pace with technological advances





SPATIAL STRATEGY

Key Priority 1: Metro Central and the City Centre

Businesses and workers have told us how important transport is to developing a more productive economy that provides jobs and prosperity for the city and the city-region. We have also been told that our city lags the best performing in the UK in terms of commercial office space - and that there is a need to improve. With much of the area south of the railway line remaining undeveloped, including Callaghan Square, there is an opportunity to expand the city centre's commercial offering and develop links with the Bay.

The Metro Central development will anchor both the city-region's new transport network as well as provide a focus for the development of commercial space in the city where businesses want to locate and where people can access jobs. The £160m redevelopment of Central Station - as part of the new Metro Central - will act as the catalyst for the next phase of development of the city centre.

Our ambitions in delivering this key priority include:

- Working with partners to secure the £160m Metro Central project
- Working with partners to compete the Central Quay and Capital Quarter developments
- Working with partners to bring forward developments that will better connect the city centre to the Bay including the regeneration of Dumballs Road, the completion of the Callaghan Square development and the improvement of Bute Street and Lloyd George Avenue
- Linking the Metro Central development to adjacent communities through the South Riverside Business Corridor





Key Priority 2: Kick-starting the Bay

There is a need for a new momentum to be put into the regeneration of Cardiff Bay. Whilst the first phase of its redevelopment has seen large scale investment in the area, it has yet to deliver its full potential. We will seek to re-ignite the Bay, with a focus on driving more visitors to the area, providing a bigger range and choice of attractions, and improving the means of getting in and out of the Bay. At the heart of this will be a revitalised Atlantic Wharf - the gateway to the Bay, where a new Indoor Arena will serve to attract a new and bigger audience.

Our ambitions in delivering this key priority include:

- Delivering a new 15,000 capacity Indoor Arena
- Developing proposals for a new public realm corridor across Bute Street and Lloyd George Avenue to improve the connection between the city centre and the Bay
- Working with partners to provide additional temporary and permanent commercial business space
- Pursuing an iconic home for contemporary arts and culture
- Working with partners to establish an anchor visitor attraction at Alexandra Head



Key Priority 3: A New Focus on Industry

Cardiff isn't just about office, retail and the visitor economy. The city has an industrial past – but we accept its industrial future will look radically different. Focusing on the East of the city we will develop a new approach to supporting the city's manufacturing and distribution sector, building on both the infrastructure already in place such as the city's docks, but also investing in new infrastructure, including completing the Eastern Bay Link road. Anchored by a new Parkway development in St. Mellons, the area will also serve to be the city's key location for its emerging energy cluster. The East will also be the focus for much needed grow-on space for the city's technology businesses, with links across the creative, fin-tech and compound semiconductor clusters.

Our ambitions in delivering this key priority include:

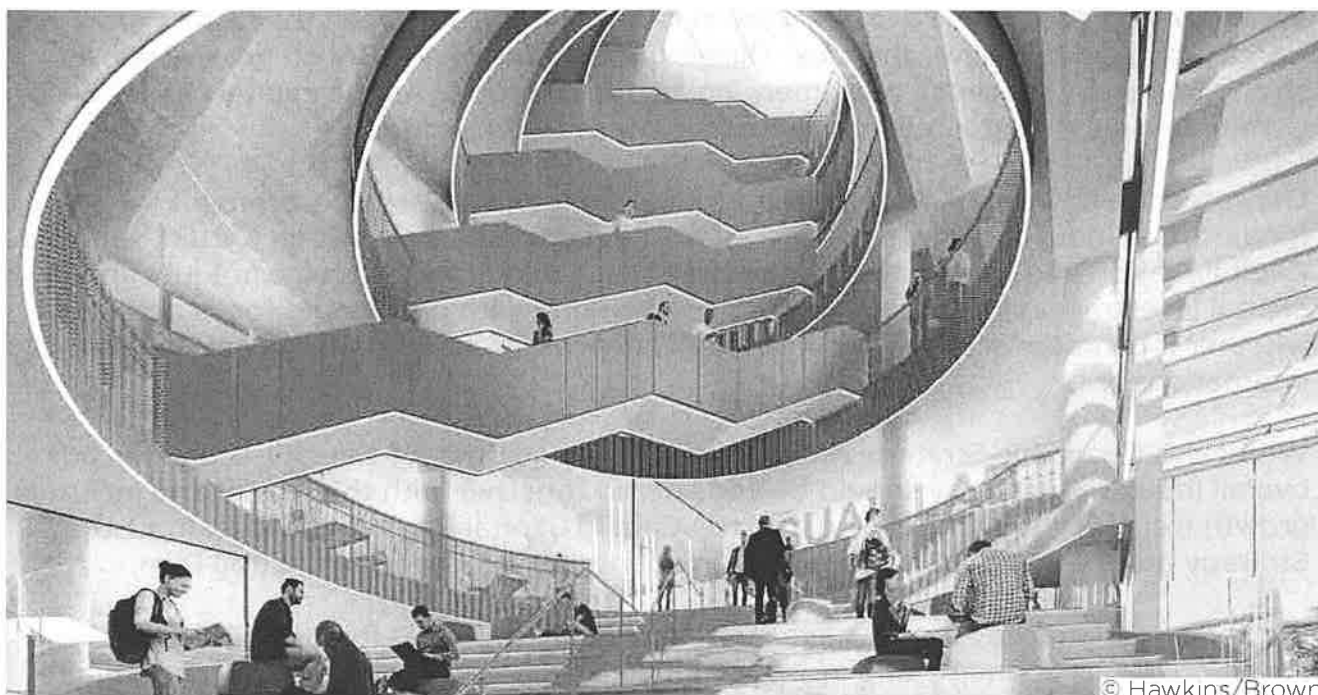
- Working with partners to deliver a new Cardiff Parkway Station at St Mellons
- Publishing an East Cardiff Development Strategy
- Better exploiting new and existing infrastructure to establish a cluster of logistics businesses
- Supporting the completion of the Eastern Bay Link Road
- Improving the connection to local communities through the Adamsdown and Roath Business Corridors

Key Priority 4: The Knowledge Corridor

Raising productivity through innovation is a critical part of the city's approach to delivering better jobs for Cardiff and the city-region. As the crucibles of the knowledge economy Cardiff is best placed to drive the nation's productivity growth. Aided by the city's universities we will support the development of a corridor of research and development focussed activity. Running from the city centre to the M4 corridor, the area will provide the foundation for business and higher education to collaborate. With over 70,000 students, and a university ranked 2nd in the UK in terms of the impact of its research, we already have many of the building blocks for success.

Our ambitions in delivering this key priority include:

- Working with partners to complete the new Innovation Campus at Maindy Park
- Supporting the development of a new life sciences park on Junction 32 of the M4



Key Priority 5: Continuing Our Sporting and Cultural Renaissance

Sport and Culture are an important part of Cardiff life. They help express our city's identity; they bring together our communities; and they showcase our city to the world. Cardiff, more than any other UK city, also understands the economic potential of sport. Raising participation is an important part of this story, and we will continue to invest in facilities to support this, with a focal point in the West of the city in terms of sport and recreation.

Critically, the completion of the International Sports Village and the Leckwith Sport Cluster will mean that Cardiff has the facilities to match its venues. Investment in our ability to showcase arts and culture will also mean that Cardiff and its communities can project our city's creative side across the globe.

Our ambitions in delivering this key priority include:

- Delivering the next phase of the International Sports Village development
- Supporting the development of a new home for Sport Wales
- Continuing to support investment in new sport facilities, from elite sport to community clubs and teams in the Leckwith area

INDUSTRIAL STRATEGY

The UK Industrial Strategy aims to increase productivity through investment in the 'five drivers of productivity': Ideas, People, Infrastructure, Business environment, Places. In response, local areas have been called upon to consider their contribution to the Industrial Strategy, to set out how their places can maximise their contribution to UK productivity, and consequently inform the allocation of the UK Shared Prosperity Fund - the successor to the EU Structural Funds.

To do this we need to identify the areas of potential in our economy - those industries we believe that Cardiff can lead the way for the UK and contribute to a rise in national productivity levels. It requires us to identify the strengths and opportunities that we have - and the interventions that would help unlock growth.

We know that Cardiff has a lot to offer. In recent years it has been the fastest growing UK city, buoyed by one of the most skilled populations of any British urban area, a strong university presence and emerging sector strengths. As the capital city of Wales Cardiff also plays a vital role in connecting Wales to the world.

Our response however is not just something that looks towards government for funding. Our industrial strategy is about aligning our resources within Cardiff, with the Capital Region and with both the Welsh and UK Government. It's also not just about capital investment, it's about engaging and working with partners to focus activities, whether it be in our schools, our Into Work services, or whether it is promoting our city internationally.

Whilst this Economic Strategy recognises four key sectors for the city-economy, our overall Industrial Strategy should be considered together with the spatial and inclusive growth elements. It will also feed into the Cardiff Capital Region City Deal Industrial Strategy and the Welsh Government's Prosperity for All Economic Action Plan.

Our Industrial Strategy is also a live strategy - it will evolve as it responds to an ever changing global economy and as opportunities arise. To that end, we will continue to develop our strategy with partners in industry and government to make sure it delivers for Cardiff, the Cardiff Capital Region, Wales and the UK.

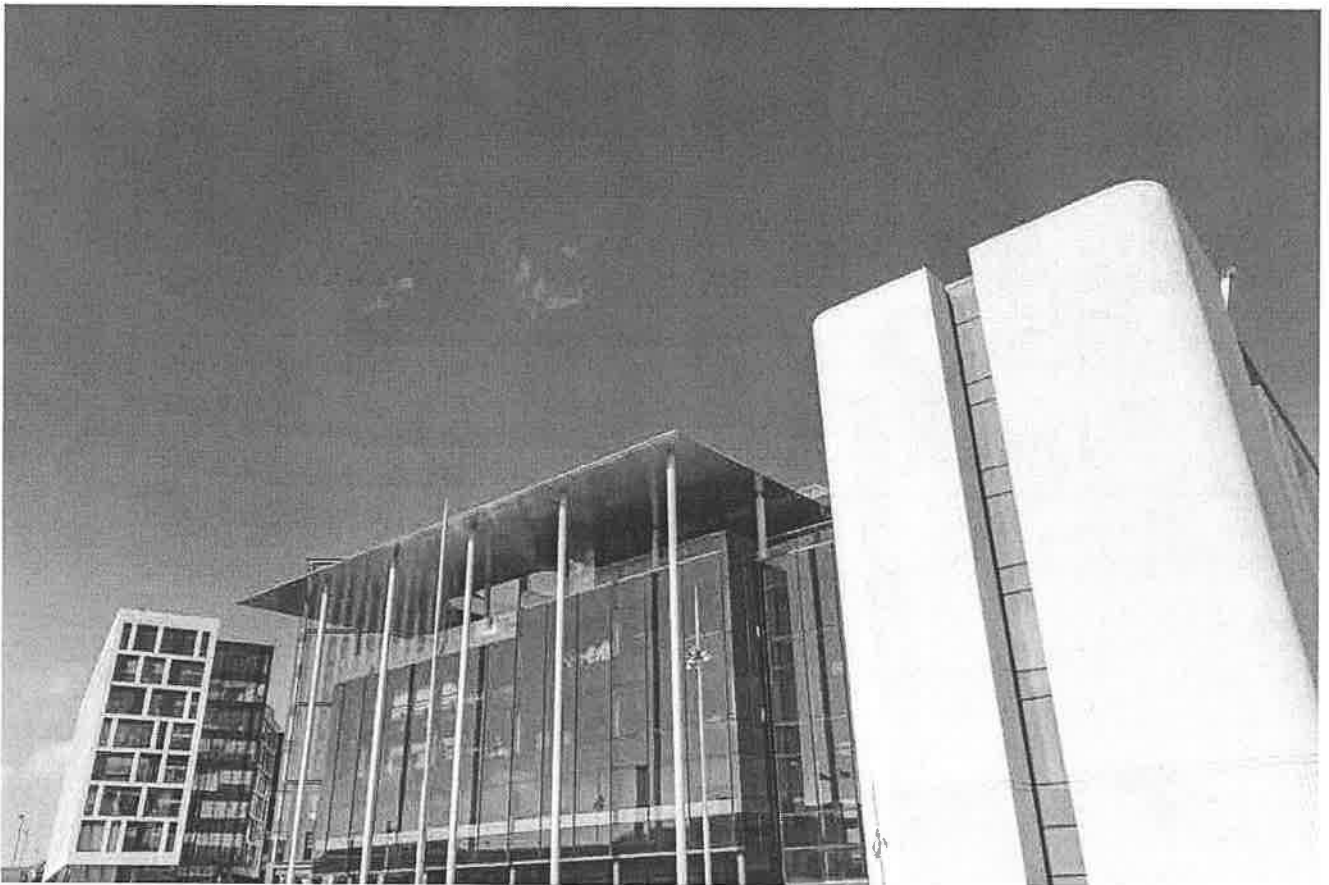
Key Priority 1: The City as a Creative and Digital Accelerator

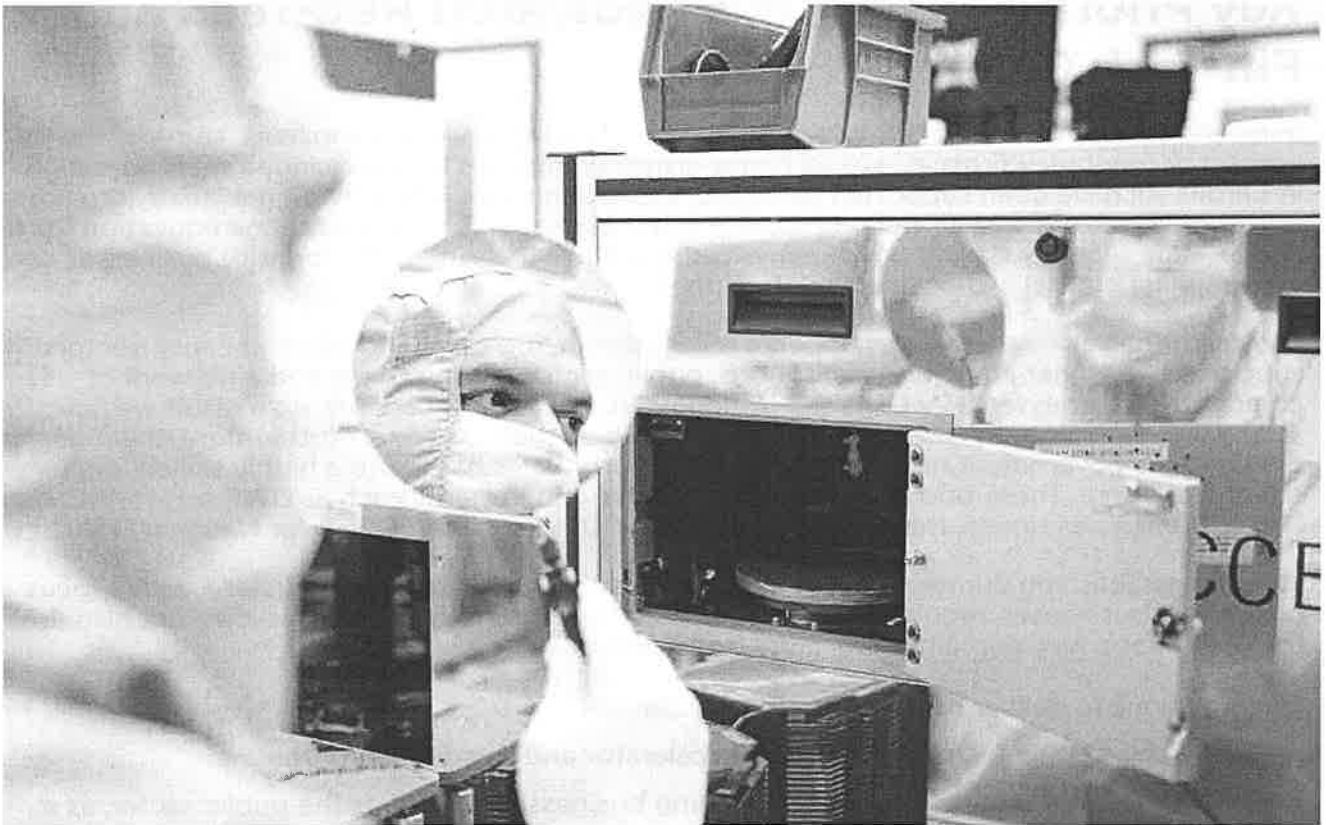
Cardiff's creative and digital sector has grown from strength to strength in recent years. The city is now home to some of the UK's biggest and best TV drama productions. Our digital start-up sector is also amongst the most exciting in the UK. The existing skills base in the city, the network of support businesses and the comparatively competitive property offer provides the platform for new companies to start and thrive.

The city's ambition is to become one of the most innovative local economies in the UK. Central to this is placing collaboration at the heart of sector development, driving productivity through sharing ideas and expertise to make sure the UK continues to lead the way as a global hot-bed for creative industries.

Our ambitions to deliver this key priority include:

- Establishing an internationally significant creative and digital showcase programme
- Putting in place a 'Creative and Digital Accelerator' programme to establish Cardiff as a UK centre for innovation in the creative industries, including both incubation, enterprise and skills programmes
- Delivering a Music Strategy for Cardiff





Key Priority 2: The World's Leading Compound Semi-Conductor Cluster

If you have a mobile phone in your pocket the likelihood is that some of its most advanced material comes from the Cardiff city-region. The city-region has led the UK's development of compound semi-conductors, and now has the opportunity to cement itself as the global leader in the sector that is expected to see exponential growth in forthcoming years. In simple terms, we are a world-leader in one of the fastest growing sectors and we must take this opportunity to exploit our position.

There are already around 700 business in the compound semi-conductor cluster, supported by expertise in Cardiff University and the Compound Semi-Conductors Applications Catapult. The Cardiff region has made a £40m investment in the cluster, and the intention is to build on this to create a sector that employs more than 2,000 highly skilled workers directly, but just as crucially drives innovation and growth in the wider digital sectors.

Our ambitions to deliver this key priority include:

- Supporting the development of CS Connected - the world's first semi-conductor cluster
- Providing space for the expansion of the sector through our Spatial Strategy

Key Priority 3: The UK's dedicated Reg-Tech and Fin-Tech Cluster

In recent years, a number of globally recognised financial services companies, some of the UK's biggest accountancy firms as well as home-grown companies have expanded their operation in Cardiff. All have been supported by higher education in the city providing a steady stream of skilled graduates as well as working closely with business to design and shape education for the sector. More recently Cardiff has experienced growth in its fin-tech sector, with businesses such as Wealthify and Delio choosing Cardiff as their base.

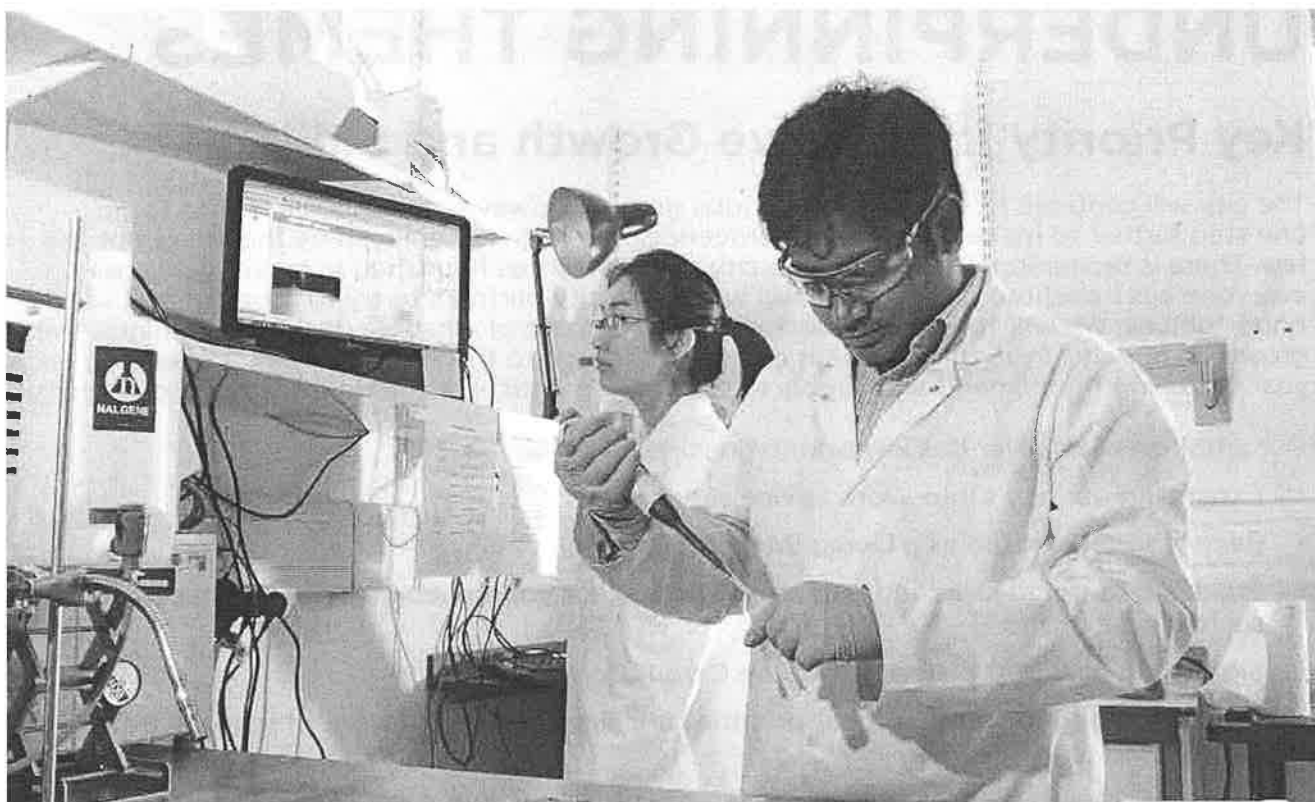
The sector has also recently developed a reputation in 'reg-tech' and cyber security, sectors supported by higher education institutions, public sector organisations and a network of competitive businesses, as well as the National Cybersecurity Academy. As a result we have seen companies such as Alert Logic choose Cardiff as their UK base. Furthermore, the presence of numerous government regulatory bodies in South Wales has led to a highly skilled, digitally-adept workforce. These bodies include government departments such as DWP and HMRC, the DVLA, Companies House, the Intellectual Property Office and the Office for National Statistics.

Through establishing our expertise in this sector, we will seek to grow a cluster - with a focus on fin-tech businesses, regulation and cyber security - that not only creates jobs, but also drives the growth of a new and emerging industry for the UK.

Our ambitions to deliver this key priority include:

- Establishing a Fin-Tech and Reg-Tech Accelerator and Academy programme
- Promoting the sector to new and expanding businesses, as well as the public sector, as a competitive business location
- Providing space for the expansion of the sector through our Spatial Strategy





Key Priority 4: A new approach to Life Sciences

The Life Sciences sector in the Cardiff city-region is diverse, research-driven and categorised by global enterprises including Norgine, Biomet, GE Healthcare, Convatec and Johnson & Johnson Innovation, as well as one of the world's top five diagnostic companies in Ortho Clinical Diagnostics and ReNeuron - the first company to carry out clinical trials of stem cells in stroke patients. The sector is also well supported by the region's universities which are home to world-leading research expertise with a strong commercial outlook, exemplified by the £4 million Welsh Wound Innovation Centre. Overall the sector and related industries currently employ over 15,000 people in the city-region and has huge potential for growth. A key priority is to support the development of a life sciences park to drive forward growth, as well as to develop a more integrated and collaborative sector.

Our ambitions to deliver this key priority include:

- Working with partners to explore options for a new Life Sciences Park for Wales on the junction between the M4 and A470
- Establishing a healthcare focussed Collaborative Centre for Learning, Technology and Innovation
- Providing space for the expansion of the sector through our Spatial Strategy

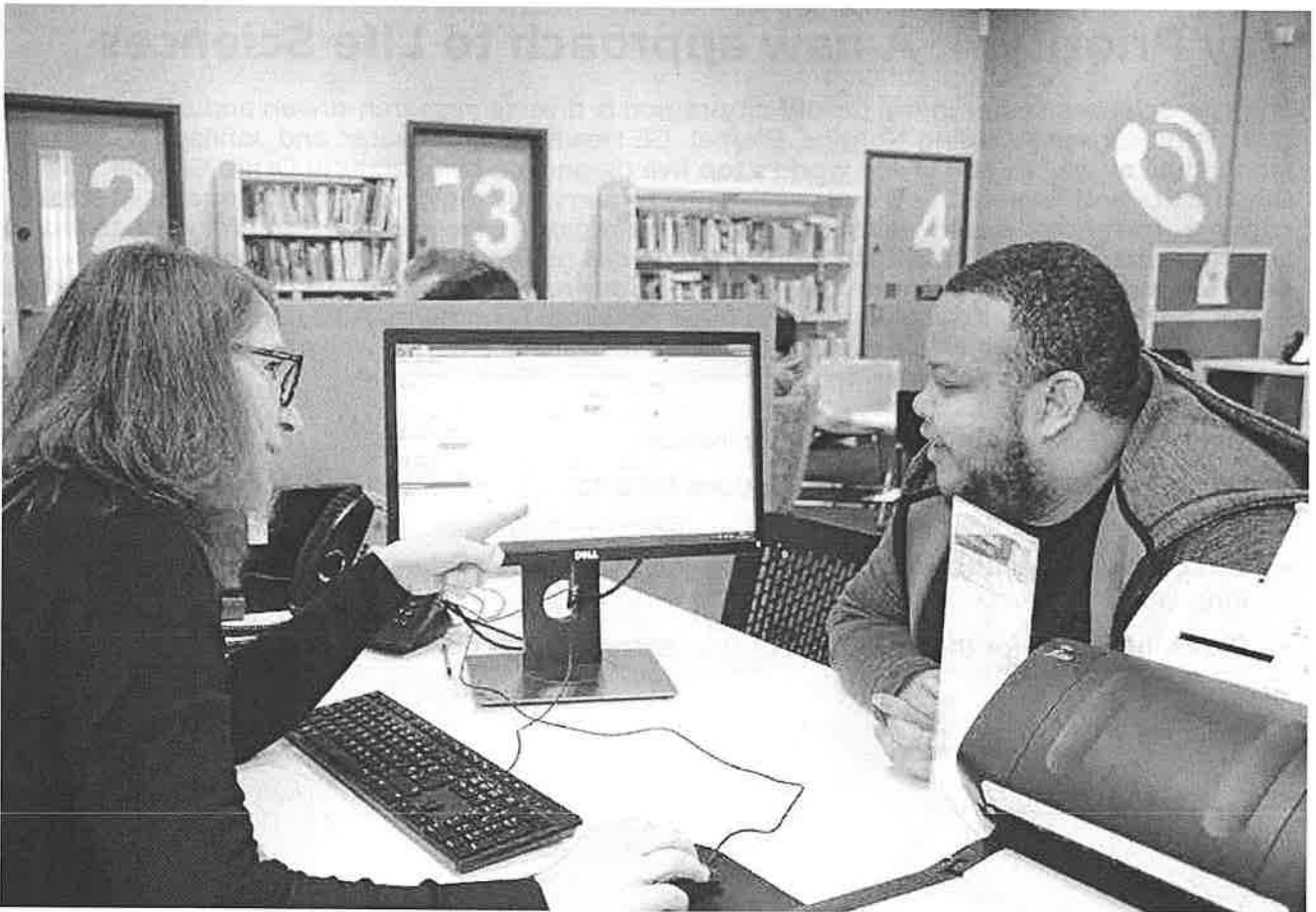
UNDERPINNING THEMES

Key Priority 1: Inclusive Growth and Skills

The city will continue to strive to deliver jobs growth. However, the Council wishes to go one step further to make sure that the proceeds of growth are enjoyed by the many, not the few. There is recognition that whilst the city's economy has flourished in recent years not everyone has benefited. The Council will work with city partners to try to broaden access to opportunities. We will consider in more depth the impact of what we do in terms of inclusive growth in our city, from development decisions through to the £390m of direct spending each year. Matching the demand and supply of skills is also critical to the future success of the city.

Our ambitions to deliver this key priority include:

- Expanding our city's Into Work advice services
- Becoming recognised as a Living Wage City
- Providing targeted skills and enterprise support for young people across all our priority sectors
- Signing up over 500 businesses to the Cardiff Commitment
- Ensuring economic development priorities are aligned with the work of schools, training and skills providers





Key Priority 2: Developing Business throughout the City

Like other cities, recent employment growth has been concentrated in the city-centre. However, there is still a need to ensure Cardiff has vibrant district centres. These centres deliver both valuable services for local residents, whilst also helping to shape our city in terms of quality of life. The Council wants to encourage investment in our district centres to make sure they can continue to provide local jobs for residents, as well as maintaining their thriving and vibrant communities.

Our ambitions to deliver this key priority include:

- Considering the development of Business Improvement Districts across the city
- Where possible, supporting the development of new business space and workshops across the city's district centres, using planning gain contributions
- Establishing a Trade and Investment programme for the city
- Promoting the Council's Socially Responsible Procurement Policy

Key Priority 3: A Working City-Region

Cardiff accounts for a third of the total economic output of the Cardiff Capital Region and around a third of all employment. It is the focus for employment in high value added service sectors, and also acts as the gateway to the valleys and wider-city-region. Each day 88,700 people commute into the city to work – more than the number that works in any other single local authority in South East Wales. Quite simply, the city is reliant on the workforce of the surrounding areas to enable it to provide the scale to compete with other UK cities in attracting mobile investment.

It is clear that for the city economy to thrive it needs the wider city-region, and for the wider city-region to thrive it needs a competitive city at its core. Given the prevailing trends for agglomeration driving innovation, productivity growth and the knowledge economy, it is also clear that a vision for a more productive and innovative city-region requires a higher density of urban activity at its heart.

Whilst the City Deal has provided the catalyst for regional working, it is clear that it is just a step in the journey rather than the destination. The City Deal established working governance to deal with the £495m investment fund, the next stage however is to establish a more robust means of working together across a wider range of economic development related activities. This means getting city region conversations outside of the realms of collaboration and into the world of strong, democratically accountable structures with the ability to deliver.

It is also important, however, that any regional working does not erode the democratic representation of the people of Cardiff. As regional working develops in Wales across a range of services the link between population, funding and decision-making must be embedded as a core principle in any new governance arrangements. Whilst regional working will see more decisions made regionally, it cannot dilute the say of Cardiff residents in comparison with other partners.

Past decades have also seen Cardiff successfully leverage private sector investment that has led to the city boasting the fastest growing economy of the UK's Core Cities. To that end, it is essential that any new regional approach recognises and respects the ability of Cardiff to attract investment and promote the city as a global location for enterprise.

The UK Government has also signalled that there will be no more City Deals, and to that end, it is essential that we work closer with the private sector who will lead much of the future investment in our city-region.

Our ambitions to deliver this key priority include:

- Working with the Cardiff Capital Region City Deal to deliver both our Economic Strategy and the Cardiff Capital Region Industrial Strategy
- Moving beyond City Deal by working with regional and private sector partners to establish robust and democratically accountable governance, weighted by population, to deal with a wider array of economic development related activities. It is essential that the say of each and every Cardiff resident is given the same weighting as all city-region residents
- Collectively promoting Cardiff and the Cardiff Capital Region internationally through events such as MIPIM, whilst recognising the unique role that the city plays in attracting investment

Key Priority 4: Enabling Infrastructure

For business to thrive it needs the right infrastructure in place. Be it transport, digital infrastructure, or simply the right space to work from. We need to work with business and government to make sure that our infrastructure can compete with the best in the UK. Working with our partners we will seek to lever investment to put in place the necessary building blocks for a competitive capital city.

Our ambitions to deliver this key priority include:

- Supporting the development of Metro Central and Parkway
- Supporting the development of the city's Transport Strategy
- Establishing a new digital infrastructure plan for the creative and fin-tech / reg-tech sectors
- Exploring the use of Tax Increment Finance to enable us to deliver world class infrastructure

Objectives

Cardiff's Well-being Plan sets the city's priorities for action between the city's public and community services, and with the citizens of Cardiff. The Plan contains Well-being Objectives, high-level priorities that the Cardiff Public Service Board has identified as being most important. Given the partnership approach that will take forward the Economic Strategy it is considered appropriate that the city-wide partnership objectives should be adopted.

Well-being Plan Objective 1 - A Capital City that Works for Wales

- Unemployment rate of the economically active population aged 16+ (model-based)
- GVA per head
- Gross Disposable Household Income per head (National Indicator 10)
- Employee jobs with hourly pay below the living wage
- Percentage of population aged 16-64 qualified NVQ4+ (degree level or equivalent)

Well-being Plan Objective 5 - Supporting People out of poverty

- Percentage of households in poverty (i.e. below 60% of median income) by MSOA (after housing costs)
- Long-term (i.e. over 12 months) JSA Claimants

In addition the Council's Corporate Plan identifies further objectives around the visitor economy and investment. Added to the original Green Paper objectives, the following Key Performance Indicators will be considered.

Key Performance Indicators

	Cardiff	Wales	UK	Core City Rank
GVA per head	£27,480	£19,140	£26,621	5th
Jobs Growth	6.0%	0.7%	1.2%	5th
Unemployment rate	6.1%	4.8%	4.4%	4th
Visitor Spend	£1.3bn	n/a	n/a	n/a
Gross Disposable Household Income per head	£16,769	£15,835	£19,432	3rd
The amount of 'Grade A' office space committed to in Cardiff (sq. ft.)	366,000	n/a	n/a	n/a
Employee jobs with hourly pay below the living wage	20.7%	24.7%	22.0%	5th
Percentage of population aged 16-64 qualified NVQ4+	48.0%	35.1%	38.4%	2nd
Earnings	£538.5	£505.9	£550.4	2nd
Employment Rate (Female as % of all)	67.4%	69.0%	70.3%	5th
Employment Rate (BAME as % of all)	59.0%	60.5%	64.8%	2nd
Employment Rate (EA core disabled as % of all)	43.7%	45.2%	50.8%	6th
Percentage of households in poverty	16%	15%	n/a	n/a
Long-term JSA Claimants	56%	42%	42%	3rd

PROPOSED PROJECTS

SPATIAL STRATEGY

Key Priority 1: Metro Central and the City Centre

Our ambitions in delivering this key priority include:

- Working with partners to secure the £160m Metro Central project
- Working with partners to complete the Central Quay and Capital Quarter developments
- Working with partners to bring forward developments that will better connect the city centre to the Bay including the regeneration of Dumballs Road, the completion of the Callaghan Square development and the improvement of Bute Street and Lloyd George Avenue
- Linking the Metro Central development to adjacent communities through the South Riverside Business Corridor

Key Project: Metro Central

The Metro Central project will deliver a new Central Transport Interchange at the heart of Cardiff city centre's core employment zone. The project encompasses a new Central bus station, the modernisation of Cardiff Central train station, and delivery of a range of other transport infrastructure such as a new coach station, a cycle hub and public realm improvements. The aim is to improve the capacity of the Central Interchange to accommodate increased frequency of services delivered through the South Wales Metro investment and to provide an infrastructure platform for jobs growth through accelerating investment in Cardiff's Core Employment Zone. The improvements required to the station include:

- Improved platform 1 & 2 access
- Platform 0 expansion
- Improved north/south links
- Improved north/south concourses
- General platform improvements
- Improved weather protection
- Tram integration

In addition to the improved transport facilities, investment in Metro Central will also contribute significantly towards leveraging circa 5 million ft² of commercial development with the potential to accommodate more than 30,000 jobs over the next 10 - 15 years.

Key Project: Central Quay

The Central Quay masterplan has been developed to establish a new area to live, work and visit south of Central Station, which will re-unite this area of the city with its riverfront. It will build on the area's heritage, with the brewery tower proudly taking its place at the centre of the development.

The area will provide a mixed-use development that will not just provide commercial and residential development, but also a new area for the people and businesses of Cardiff to use.

Key Project: Dumballs Road

The proposed Dumballs Road development will connect the city centre to the Bay, as well as opening up the city's riverfront. The development will also complement the Central Quay proposals, providing a mixed-use footprint that will provide homes, jobs and new open spaces for Cardiff residents. Currently the site is dominated by low density activities that don't reflect the area's city centre location and potential for commercial and residential development. A comprehensive masterplan will see the regeneration of the area that aims to deliver:

- Significant city centre development on brownfield land
- A focus on residential towards the riverside, commercial/office use towards the interior and active retail along riverside and key open spaces
- Improvements in accessibility for all modes
- Priority routes for pedestrians
- Dedicated cycle routes

Key Project: South Riverside Business Corridor

The South Riverside Business Corridor, which focusses on Tudor Street, Lower Cathedral Road and Cowbridge Road East, and interconnecting areas, is proposed as an initial target area for support under the Targeted Regeneration Investment programme. It includes a major district centre serving a wide catchment area from Ely to Riverside and also provides a link into our city's communities from the Central Square development. Fundamentally the project aims to ensure that the proceeds of growth that are accrued by Central Square are shared with the nearby communities.

A package of regeneration interventions that will be considered includes:

- Commercial property enhancement schemes to uplift retail frontages and facilitate business development
- Gateway improvements leading to key city centre destinations including the Central Square redevelopment
- Improvements to the commercial environment, including public realm and community safety improvements
- Bringing vacant and under-used floor-space into beneficial use including opportunities for low-cost, flexible business start-up units
- Active travel measures to link with major new infrastructure proposals including measures (walking, cycling and public transport) which encourage access to, and through the corridor
- Identification of new residential/mixed use and wider investment opportunities

Key Priority 2: Kick-starting the Bay

Our ambitions in delivering this key priority include:

- Delivering a new 15,000 capacity Indoor Arena
- Developing proposals for a new public realm corridor across Bute Street and Lloyd George Avenue to improve the connection between the city centre and the Bay
- Working with partners to provide additional temporary and permanent commercial business space
- Pursuing an iconic home for contemporary arts and culture
- Working with partners to establish an anchor visitor attraction at Alexandra Head

Key Project: Indoor Arena

The development of a 15,000 seat indoor arena has been a long-standing aspiration of the city. A new multi-use venue will be built linking with investment in the South Wales Metro and providing a new anchor attraction for Cardiff Bay. With a target date of 2022 for completion, the Arena aims to trigger the next phase of development for Cardiff Bay. It will also see the Atlantic Wharf area, as well as the associated leisure complex, point towards rather than away from the Bay area of the city.

Key Project: Highline

The Highline aims to link the city centre to the Bay. Beginning at Callaghan Square and ending at the Wales Millennium Centre, this City-Bay Park will be both an improved route between the Bay and the city centre, as well as a destination in its own right. Following the development of urban park schemes such as the 'Gardens of the Turia' in Valencia, it will also be part of the city's active travel infrastructure, as well as complementing the Metro.

Key Project: Alexandra Head

When the Volvo Ocean Race visited Cardiff in the spring of 2018 it is fair to say that it exceeded all expectations. Against a target of 130,000 visitors Cardiff ended up delivering a total of 175,000. Central to this success was the location of the Volvo Ocean Race Village at the Alexandra Head site. We will explore the potential for an anchor visitor attraction to be developed at the site, capitalising on its waterfront location and its place on the 'urban park' of the Cardiff Bay Barrage.

Key Project: Providing the Platform for Business

The development of Cardiff Bay is predicated on increasing footfall and demand for local businesses. In turn this will require increased provision within the Bay to make sure that when visitors come to use the new arena they dwell in the area before and after events. The Eisteddfod in 2018 was an excellent showcase of how the Bay can be used as a canvas for small businesses. We aim to build on this success and work with partners to identify and package areas for pop-up and retail/food and drink use across Cardiff Bay. We will also work with existing businesses to make sure the approach does not displace current activity, rather it supports increased footfall and spend generally. As part of this proposal we will seek to protect the city's waterfront as the key commercial space within Cardiff Bay.

Key Project: Centre of Contemporary Arts and Innovation

Cardiff has a long history of innovation, most notably Marconi's first wireless transmission across sea in 1897. Building on our history of innovation, we will explore options for the development of a new concept for contemporary art and science collaboration space in Cardiff Bay. The Centre would provide a focal point for activity in the sector - both in terms of gallery and exhibition space, but also as a place for artists, business and visitors. It will also provide a unique visitor destination to complement the city's current range of cultural attractions, providing flexible gallery spaces, as well as providing a working lab where artists and scientists collaborate.

Key Priority 3: A New Focus on Industry

Our ambitions in delivering this key priority include:

- Working with partners to deliver a new Cardiff Parkway Station at St Mellons
- Publishing an East Cardiff Development Strategy
- Better exploiting new and existing infrastructure to establish a cluster of logistics businesses
- Supporting the completion of the Eastern Bay Link Road
- Improving the connection to local communities through the Adamsdown and Roath Business Corridors

Key Project: Cardiff Parkway

We will work with partners to progress the proposed Cardiff Parkway project, which comprises a new railway station on the eastern side of Cardiff that will open business development with the potential to employ 15,000 people. The development however is far more than a station. It will also comprise 1 million ft² of commercial business and technology park development, providing a lower density location for businesses that complements the higher density city centre offer. This will provide a unique location for business not just within the city-region, but within the UK, with new high spec business premises located directly at a mainline railway station. The Parkway station itself will also be a major addition to the South Wales Metro, serving both commuting traffic into Cardiff from the north east of the city, as well as supporting the city's transport infrastructure on major event days.

Key Project: Eastern Bay Link Road

The long-standing ambition to complete the Eastern Bay link road remains - not just to provide access to the city centre and Bay from the east, but also to unlock the economic potential of the East of the city - in terms of business and labour market. We will work with partners to explore options for completing this link, and ensure that it fits in with the wider East Cardiff Development Strategy.

Key Project: Eastern Distribution Centre

Investment in the road infrastructure, linking with the M4, will open up new opportunities for distribution. Market demand for facilities is on the rise across the UK, and it is important that Cardiff can capture any investment taking place to make sure that the people of our city benefit. The development of an Eastern Distribution Centre will exploit this potential.

Key Project: East Cardiff Development Strategy

We will bring forward a new East Cardiff Development Strategy that will comprise the coastal areas to the East of the city. Under the themes of transport, technology and sustainability the plan will outline the infrastructure requirements for the area, whilst also bringing

Key Project: Adamsdown/ Roath Business Corridor

The Adamsdown/Roath Business Corridor – which includes City Road, Crwys Road, Clifton Street and interconnecting areas – has also been identified as an area for support from the Targeted Regeneration Investment programme. The area is home to a diverse range of commercial and business activities and also acts as the gateway to the east of the city from Cardiff city centre. It is proposed that a feasibility assessment for this target area is undertaken in 2019/20, with the aim of commencing project delivery in 2020/21. Proposed investment themes will include:

- Improvements to the eastern gateway to the city centre
- Active travel measures to link with major new infrastructure proposals and promote safe cycling and walking routes to, and within the Corridor
- Improvements to commercial frontages and the public realm, building on previous District Centre investments
- Measures to bring longer-term vacant properties into beneficial use and opportunities for business start-up accommodation
- Enhancements to the setting of Cardiff Royal Infirmary, which is being converted into a locality health and well-being centre

Key Priority 4: The Knowledge Corridor

Our ambitions in delivering this key priority include:

- Work with partners to complete the new Innovation Campus at Maindy Park
- Support the development of a new life sciences park on Junction 32 of the M4

Key Project: Cardiff Innovation System

Cardiff University's Innovation Campus on Maindy Road will build partnerships across private, public and third sectors to exploit the city's knowledge base and commercialise its research. The development of the Innovation Campus will bridge this gap, increasing and improving productivity in Cardiff and the city-region - as well as for the UK.

The development will be home to two world leading scientific research establishments - the Institute for Compound Semiconductors and Cardiff Catalysis Institute. The site will also host SPARK, the world's first social science research park. A new Innovation Centre - a creative space for start-ups, spinouts and partnerships - will also expand the city's innovation and incubation space and provide unique facilities for knowledge-based businesses.

In addition to supporting this development we will also establish, with the city's higher education institutions a new approach to supporting innovation in Cardiff. This approach will work with city-region partners to deliver against the Grand Challenges identified in the UK Government's Industrial Strategy.

Key Project: Life Sciences Park

We will explore options to develop a new Life Sciences park at Coryton to support new advanced technology businesses, located near the junction of the M4 and A470 - creating potentially Wales' most accessible site. The life sciences sector in the Cardiff Capital Region is developing an international reputation. The city-region has a research-driven sector characterised by global enterprises including Norgine, Biomet, GE Healthcare and Convatec. The Cardiff Capital Region is also home to one of the world's top five world diagnostic companies Ortho Clinical Diagnostics, the £4 million Welsh Wound Innovation Centre, ReNeuron, the first company to carry out clinical trials of stem cells in stroke patients and leading European specialist pharmaceutical company Norgine.

However, there is a lack of expansion space for start-up and growing businesses within the sector. This is inhibiting the ability for the city region to exploit its strength and expertise in the life sciences sector, especially through exploiting its higher education base.

Key Priority 5: Continuing Our Sporting and Cultural Renaissance

Our ambitions in delivering this key priority include:

- Delivering the next phase of the International Sports Village development
- Supporting the development of a new home for Sport Wales
- Continuing to support investment in new sport facilities, from elite sport to community clubs and teams in the Leckwith area

Key Project: International Sports Village Masterplan

It has been clear that the development of the International Sports Village has stalled in recent years. However, it remains very much an area of significant potential for Cardiff with a unique waterfront location for its residential development, as well as an emerging cluster of activities that include the new Ice Arena, the Whitewater Rafting Centre and the International Pool. We will seek to expand on these developments and deliver the foremost location in Wales in terms of concentrations of sporting and leisure activities. This will also include providing a much improved commercial offer to make the ISV a destination in its own right.

Key Project: A new home for Sport Wales

We will explore plans for a redeveloped Sport Wales National Centre to cement its position as the home of sport in Wales, improving facilities and site access for all users and delivering a base that befits our nation's and city's status as a conveyor belt of international sporting talent. The development will help to secure the long-term future of Sport Wales in the Capital City.

Key Project: Improve sport facilities, from elite sport to community clubs and teams

We will work with sports clubs and organisations across the city to explore how we can improve facilities. A partnership approach will be adopted where improvements are supported through a mix of Council resources, partner organisation investment, private support and through the work of clubs themselves.

PROPOSED PROJECTS

INDUSTRIAL STRATEGY

Key Priority 1: The City as a Creative and Digital Accelerator

Our ambitions to deliver this key priority include:

- Establishing an internationally significant creative and digital showcase programme
- Putting in place a 'Creative and Digital Accelerator' programme to establish Cardiff as a UK centre for innovation in the creative industries, including both incubation, enterprise and skills programmes
- Delivering a Music Strategy for Cardiff

Key Project: Creative and Digital Accelerator and Academy

There is a clear opportunity to develop the sector to deliver more and better jobs. Our aim, however should not be to be the biggest - but to be the most innovative and productive. To be the place where businesses know they can start and flourish and become the next unicorn creative and tech businesses. There is, however, a need to co-ordinate and support the sector. In response Cardiff Council proposes to establish a Creative and Digital Accelerator and Academy programme, overseen by an industry led board.

The Creative and Digital Strategic Board will co-ordinate skills and training provision and business support for the sector in Cardiff.

This will supplement established national provision in Wales and the UK to ensure seamless links between the supply and demand for skills and business support. The Board will also provide a strategic lead for inward investment for the sector in the city. To support this we will also seek to establish more space for start-up businesses within the sector, as well as providing places for people to experiment and learn new skills.

Key Project: Establish an internationally significant creative and digital showcase programme

A proposed Creative and Digital Showcase aims to put Cardiff on the map as the UK city for creative and digital technologies.

Drawing upon and bringing together elements of the cultural and tech worlds, the showcase will also provide networking opportunities for businesses and individuals across the sector to collaborate.

As well as promoting the sector, it will also seek to attract an audience in its own right. Events such as South by South West and the Edinburgh Festival, originally a showcase for local artists, but now an internationally recognised attraction that draws hundreds of thousands of visitors, provide examples for the Cardiff Showcase event.

Key Project: Deliver a Music Strategy for Cardiff

Cardiff Council has undertaken a major assessment and analysis of the music industry and ecology in the city, working with the global leaders of the Music Cities Movement - Sound Diplomacy. The aim is to deliver a music strategy and progressive policy to help us achieve our aspiration to become the first music city in the UK that means the first local authority to consider music as an essential part the city's infrastructure and future development.

Cardiff already has a flourishing music ecosystem, from a sophisticated classical music ecology, to a thriving grassroots scene, we have a range of venues that showcase music with five venues equipped for concerts over 7,500 capacity, including three stadia. The missing piece of this jigsaw is the proposed multi-purpose arena.

Cardiff Council will continue to work with partners to further explore the value of music to the city, delivering best practice governance and leadership on music friendly: Licensing, Planning, Transport, Education, Professional Development, Employment, Music Tourism, Audience development, Place-Making and Music City brand building, promoting Cardiff as a music destination and further establishing Cardiff as a robust city of culture, whilst setting out how to maximise its role as a music city.

We will actively work with partners to attract concerts, events, music conventions and conferences, working to develop world-class signature music events and showcasing platforms, whilst continuing to support the existing city music ecology and infrastructure.

Key Priority 2: The World's Leading Compound Semi-Conductor Cluster

Our ambitions to deliver this key priority include:

- Supporting the development of CS Connected - the world's first semiconductor cluster
- Providing space for the expansion of the sector through our Spatial Strategy

Key Project: Cardiff Parkway

The proposed Cardiff Parkway development (see above) lies at the heart of the UK's Compound Semi-Conductor Cluster. For the cluster to thrive however, it needs space to expand, and it needs the space for businesses to congregate to deliver the agglomeration effects that will drive productivity and innovation.

Key Priority 3: The UK's dedicated Reg-Tech and Fin-Tech Cluster

Our ambitions to deliver this key priority include:

- Establishing a Fin-Tech and Reg-Tech Accelerator and Academy programme
- Promoting the sector to new and expanding businesses, as well as the public sector, as a competitive business location
- Providing space for the expansion of the sector through our Spatial Strategy

Key Project: Fin-Tech and Reg-Tech Accelerator and Academy programme

Working with business we propose to establish a programme of support to drive innovation and productivity within the Fin-Tech and Reg-Tech sectors, an essential part of which is the city's emerging fin-tech start up community as well as its cyber security expertise. The city-region's expertise in data and regulation – established through organisations such as Companies House and the Office for National Statistics in Newport – is supported by a world-class cyber security eco-system and emerging fin-tech companies such as Wealthify. In addition, FTSE 100 companies like Admiral, headquartered in the city, have shown how some of the UK's youngest and fastest growing financial services companies can thrive in the city.

The initial steps of the programme will involve bringing together the sector to establish a programme of interventions, aimed at the UK's Industrial Strategy, to establish Cardiff as the foremost UK location for 'reg-tech' start-ups, and to support the city in growing existing businesses within the wider sector. Key elements of the programme will include building on the already established graduate schemes, such as the Welsh Financial Services Graduate Programme. It will also include understanding and responding to the infrastructure requirements of the sector.

Key Project: Establishing Cardiff as the UK Hub for Reg-Tech

Cardiff has already successfully secured investment from the UK Government in Central Square. It is important, however that we don't see this as the culmination of its relocation strategy. Establishing Cardiff as a location for government services within the 'reg-tech' sector, building on both its expertise, but also its aspirations to support the cluster, will become a focal point for attracting skilled government jobs to Cardiff. This approach will be predicated on showing that we have the skills and expertise within Cardiff and the city-region, and not simply offering our city as a low cost location.

Key Priority 4: A new approach to Life Sciences

Our ambitions to deliver this key priority include:

- Working with partners to explore options for a new Life Sciences Park for Wales on the junction between the M4 and A470
- Establishing a healthcare focussed Collaborative Centre for Learning, Technology and Innovation
- Providing space for the expansion of the sector through our Spatial Strategy

Key Project: Life Sciences Park

As noted above, we will explore options to develop a new Life Sciences park at Coryton to support new advanced technology businesses, located near the junction of the M4 and A470 - creating potentially Wales' most accessible site.

PROPOSED PROJECTS UNDERPINNING THEMES

Key Priority 1: Inclusive Growth and Skills

The emphasis is on providing a range of opportunities for people to gain skills and experience, and to participate in the economy. This includes supporting people to start their own businesses, and to create jobs for others.

Supporting people to start their own businesses is a key priority. This includes providing access to finance, and to the support and advice that people need to start their own businesses.

Supporting people to create jobs for others is also a key priority. This includes providing access to training and skills, and to the support and advice that people need to create jobs for others.

Key Priority 2: Living Wage

City

The emphasis is on ensuring that all workers receive a living wage. This includes supporting employers to pay a living wage, and to provide their employees with the support and advice that they need to do so. The living wage is defined as the minimum amount of money that a worker needs to live on, and is set by the Living Wage Foundation. The living wage is currently £10.15 per hour for most workers, and £11.95 per hour for those working in the public sector.

Supporting employers to pay a living wage is a key priority. This includes providing access to finance, and to the support and advice that employers need to pay a living wage.

Supporting workers to receive a living wage is also a key priority. This includes providing access to training and skills, and to the support and advice that workers need to receive a living wage.

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PROPOSED PROJECTS

UNDERPINNING THEMES

Key Priority 1: Inclusive Growth and Skills

Our ambitions to deliver this key priority include:

- Expanding our city's Into Work advice services
- Becoming recognised as a Living Wage City
- Providing targeted skills and enterprise support for young people across all our priority sectors
- Signing up over 500 businesses to the Cardiff Commitment
- Ensuring economic development priorities are aligned with the work of schools, training and skills providers

Key Project: Living Wage City

When employers commit to pay their staff a real Living Wage, it not only benefits low paid workers, but can also help increase local productivity and drive inclusive growth. Recent analysis on the impact of the real Living Wage across city-regions in the UK outlined that if a quarter of the workers in the Cardiff Capital Region currently paid below the Living Wage were brought up to real living wage levels this could contribute a net additional £24m to the city-region economy annually. As the longest accredited Living Wage Council in Wales, the Council's ambition is for Cardiff to be recognised as a Living Wage City. To achieve this we will:

- Encourage our suppliers to become accredited employers with the Living Wage Foundation
- Establish a wider city partnership to support more of the city's 'anchor' employers to become accredited Living Wage employers
- Work with potential investors to ensure they recognise the benefits of paying the real Living Wage, in particular that the potential benefits to their business will offset any additional costs to their wage bill.

Key Project: Into Work Advice Services

We will continue the development of our Into Work Services, delivering support services directly into all of our communities. Cardiff launched its new approach to employability support in April 2018. The new service provides an individualised approach by bringing together various funding streams and the Council's own resources to create one service working seamlessly together and directly into communities across Cardiff. The new Into Work Advice Service includes the following elements:

- A single Gateway into all employability services
- Light touch support in our job clubs
- Digital Inclusion and Universal Credit help
- In-depth Mentoring and Support
- Specialist youth team
- Employer Engagement alongside the Cardiff Commitment team
- Major and regular local jobs fairs
- Self-Employment advice and support
- In Work Poverty Support
- Into Work Training
- Adult Community Learning

The Into Work Services have already proved successful, with over 25,000 people registered on the database with footfall of over 43,000 in 2017/ 2018. We will seek to expand and develop the service, working in partnerships with WG, DWP and training providers. The team are also hoping to open the new CSCS test centre in the East of the city in 2019.

Key Priority 2: Developing Business throughout the City

Our ambitions to deliver this key priority include:

- Considering the development of Business Improvement Districts across the city
- Where possible, supporting the development of new business space and workshops across the city's district centres, using planning gain contributions
- Establishing a Trade and Investment programme for the city
- Promoting the Council's Socially Responsible Procurement Policy

Key Project: BID Development

Consortiums of retail representatives in the city's district centres will be supported to establish proposals for developing a Business Improvement District. Officer support would also be available for interested parties to undertake initial modelling of potential BID area.

Key Project: Workshop Development

Whilst the private sector has supported the development of quality workspace in the city there is still a need for easy access and affordable premises for start-up businesses. These low cost and flexible spaces can help support the development of the city's businesses of the future, yet the return for private developers in bringing together such spaces can hold back their development. We propose to establish a programme of expanding our existing workshop provision across the city to make sure we can exploit the potential of Cardiff's entrepreneurial base.

A programme of investment will be developed to identify areas of investment for workshops, focussing on district centres and those areas currently underserved by provision where there is clear demand from the business community. Where appropriate we will also seek to use planning gain contributions to support the development in workshop provision.

Key Project: Trade and Investment Board

In responding to the challenges of Brexit, and in responding to the UK's Industrial Strategy we will establish an industry led Trade and Investment Board. The board, comprising representatives from key sectors in the city, including those related to the Creative and Digital and Fintech sectors, will help to establish a new trade and investment strategy to shape and develop the city's brand to promote Cardiff as a location for investment, as well as supporting city businesses to access wider markets both internationally as well as across the UK.

Key Priority 3: A Working City-Region

Our ambitions to deliver this key priority include:

- Working with the Cardiff Capital Region City Deal to deliver both our Economic Strategy and the Cardiff Capital Region Industrial Strategy
- Moving beyond City Deal by working with regional and private sector partners to establish robust and democratically accountable governance, weighted by population, to deal with a wider array of economic development related activities. It is essential that the say of each and every Cardiff resident is given the same weighting as all city-region residents
- Collectively promoting Cardiff and the Cardiff Capital Region internationally through events such as MIPIM, whilst recognising the unique role that the city plays in attracting investment

Key Project: Our Vision for a Competitive City-Region

Cardiff Council will work with the local authorities of the Cardiff Capital Region to deliver a long-term and sustainable partnership arrangement that drives the development of the city-region for mutual benefit, with more robust and stronger governance arrangements than those currently in place for the Cardiff Capital Region City Deal to take forward a city-region that delivers for Cardiff and the people of South East Wales.

Key Priority 4: Enabling Infrastructure

Our ambitions to deliver this key priority include:

- Supporting the development of Metro Central and Parkway
- Supporting the development of the city's Transport Strategy
- Establishing a new digital infrastructure plan for the creative and fin-tech / reg-tech sectors
- Exploring the use of Tax Increment Finance to enable us to deliver world-class infrastructure

Key Project: Creative and Financial Services Digital Network

We will explore the development of a dedicated network within the city, linking nationally and to the city-region, to support the growth of digitally reliant small and medium sized businesses. It will aim to support those businesses for whom the market has not always provided easy to access, fast, and affordable services.

Key Project: SMART Cities Strategy

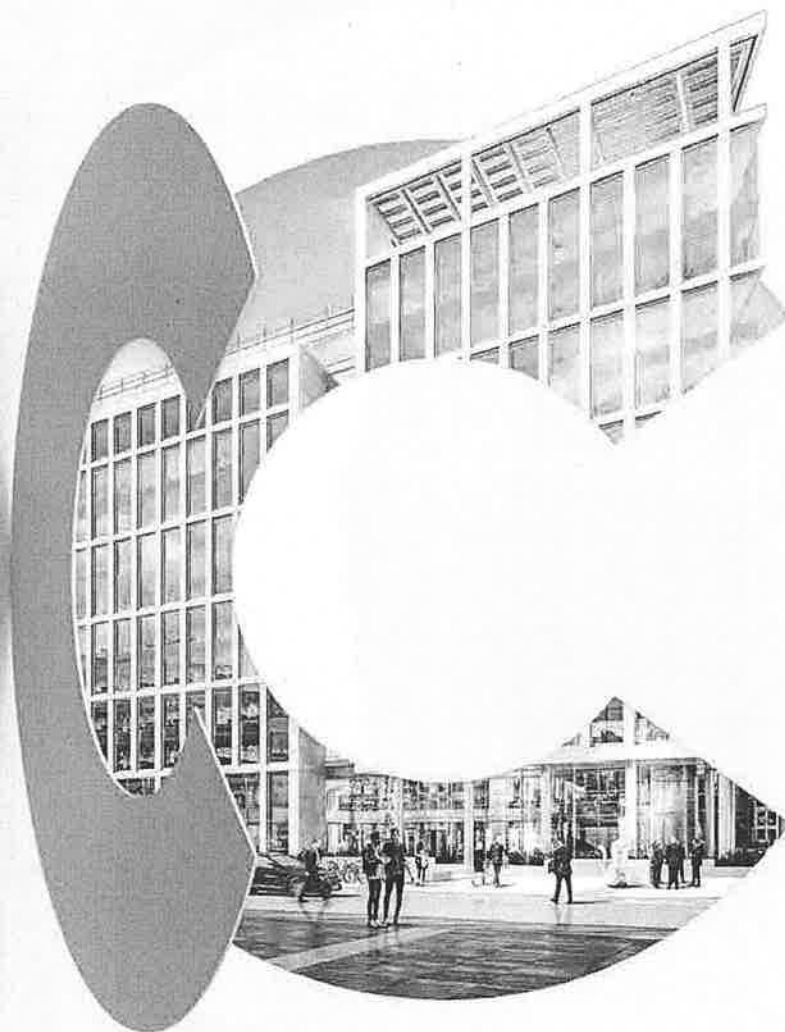
Cardiff Council has appointed a Chief Digital Officer and has established a 'digital first' strategy. The Smart City Strategy will take this to the next level, working with partners across all sectors to develop a data rich environment to support a more productive city that better aligns citizen needs with the services that are provided and the investment that is made. The strategy will also consider how we can improve planning for both service delivery and investments that improve not only quality of life today, but also for future generations.

Key Project: Tax Increment Financing

We will explore the development of a Tax Increment Finance pilot. Tax Increment Financing is a means of unlocking development value through investing in infrastructure, which is funded through future business rates. The scheme enables projects to be taken forward that would otherwise face barriers in terms of infrastructure costs. We will work with the Welsh Government to establish a pilot programme that will deliver economic benefits and infrastructure investment at zero lifetime cost to the public purse.



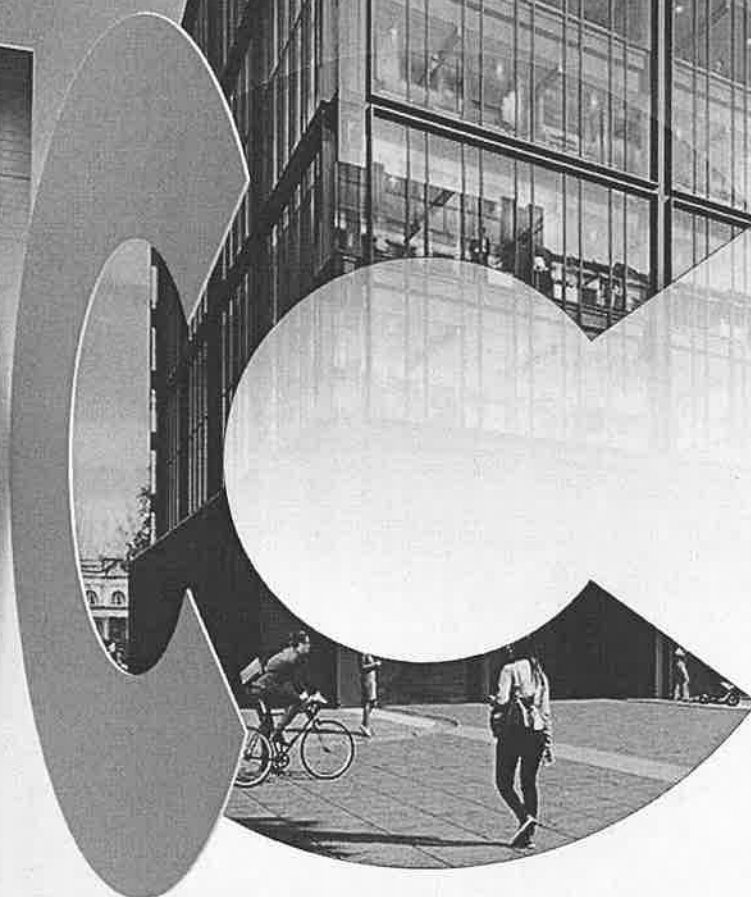
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Appendix 4



Cardiff Economic White Paper Building More and Better Jobs

Draft

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The Cardiff Economy

The city's economy continues to perform well. Jobs are being created, and the city's GVA is rising faster than any other UK Capital. We have seen new sectors emerge in the city, from fin-tech to creative and cultural enterprises that are truly competitive on a global level. Our universities continue to provide a pipeline of talent, whilst school and further education performance has improved considerably. Furthermore, the city's NEET population - those not in employment, education or training - has fallen dramatically.

We know, however, that challenges remain. Despite job growth we have seen unemployment creep up in recent years. We continue to see stark differences in the economic outcomes of our different communities, and the city's southern arc stubbornly remains an area in need of support.

Brexit also remains a threat, not just in terms of trade and the job market, but also in terms of support for the city-region for regeneration.

Our opportunities, however, are considerable and real, and we should not underestimate what Cardiff can contribute to the Wales and UK economy. Our city is home to household names in the financial services sector, homegrown and Cardiff developed enterprises. Online TV providers are commissioning Cardiff companies to produce their latest boxset shows. The workings of most of the world's mobile phones will include technology developed and made in Cardiff.

As a place to live, work and visit Cardiff continues to punch above its weight. We have well over 20 million people a year now visiting our city, spending more than £1.3bn. We continue to rank highly in quality of life tables, and the likes of the Champions League has meant that the city continues to attract more and more world-class events.

Employment

A variety of different data sources can be used to highlight the city's employment growth. The most recent, based on the Annual Population Survey suggests that well over 230,000 people are working in the city.

Workplace Employment

Apr 2014-Mar 2015	206,900
Apr 2015-Mar 2016	222,000
Apr 2016-Mar 2017	231,500
Apr 2017-Mar 2018	236,800

Source: annual population survey - workplace analysis

Almost half (47.9%) of those in employment in the city are in one of Welsh Government's priority sectors. Financial and Professional Services (19.0% of total employment) is by far the largest of these in Cardiff with it accounting for almost a third of the sector's total employment in Wales. Creative Industries (7.1%) are also more prevalent in the city, with Cardiff again responsible for around a third of Wales's total employment in the sector.

Employment by Welsh Government Priority Sector, 2016

Priority Sector	Employment (thousands)			
	CARDIFF		Wales	
	No.	%	No.	%
Advanced materials / manufacturing	5.6	2.5	83.9	6.2
Construction	13.9	6.1	110.5	8.2
Creative industries	16.1	7.1	48.6	3.6
Energy & environment	25.3	11.2	155.8	11.6
Food & Farming	1.6	0.7	50.6	3.8
Financial & professional services	43.1	19.0	136.8	10.2
ICT	5.6	2.5	26.6	2.0
Life sciences	3.4	1.5	17.2	1.3
Tourism	21.3	9.4	131.2	9.8
<i>In A Priority Sector</i>	108.6	47.9	<i>604.1</i>	<i>45.0</i>
<i>Not In A Sector</i>	118.3	52.1	<i>738.6</i>	<i>55.0</i>
Total	226.9	100.0	1,342.6	100.0

Source: Welsh Government

NB: Local units are individual sites of an enterprise

The priority sector totals will not equal the sum of the individual priority sectors as there is overlap between several sectors.

Today over two-thirds (69.9%) of Cardiff's population aged 16-64 are in employment; the fifth highest rate amongst the core cities and Edinburgh. National comparisons tend to be difficult - simply because of the city's large student population. This also impacts on the city's economic activity rate.

Employment and Employment Rate (Aged 16 to 64), Jan - Dec 2017

Area	Employment Rate (%)	Economic Activity Rate (%)
Bristol, City of	78.2	81.8
Leeds	76.6	80.1
Edinburgh, City of	75.7	77.6
Sheffield	70.7	75.6
CARDIFF	69.9	74.9
Manchester	67.5	72.0
Liverpool	67.1	71.3
Newcastle upon Tyne	66.6	71.1
Glasgow City	66.0	70.0
Birmingham	63.6	69.4
Nottingham	57.4	62.4
Wales	72.4	76.0
United Kingdom	74.7	78.2

Source: Annual Population Survey, ONS

Cardiff's unemployment rate for those aged 16+ (6.1%) is one of the highest across the core city network. Although it experienced a sizeable decrease between 2012 and 2016, Cardiff has also consistently exceeded the figures of both the Wales and Great Britain since 2004, and saw its rate increase over the past year. Much of this rise has been driven by a substantial increase in the economically active population over recent years, where more people are entering the labour market and looking for work.

Unemployment rate - aged 16-64, Jan - Dec 2017

Area	Unemployment Rate (Aged 16+)
Nottingham	8.3
Birmingham	8.1
Newcastle upon Tyne	6.9
CARDIFF	6.1
Sheffield	6.0
Liverpool	5.9
Manchester	5.6
Glasgow City	5.6
Leeds	4.7
Bristol, City of	4.0
Edinburgh, City of	3.2
Wales	4.8
Great Britain	4.4

Source: Annual Population Survey, ONS

NB: Local authority rates are model-based

Economic Output

In 2016, Cardiff (£9,933m) accounted for 17% of the total gross value added (GVA) for Wales, with its GVA growing at a faster rate (5.7%) than both Wales and the UK over the year. In terms of GVA per head, Cardiff (£27,480) is only a mid-table performer across the major cities, with the figure for Edinburgh over 40% higher at £39,321, although its rate of growth over the year again compared favourably with the other areas

Gross Value Added (Balanced) (£million), 2016

Area	2016	Annual % Change
Birmingham	£25,720	4.3
Leeds	£21,951	2.2
Glasgow City	£20,371	3.5
City of Edinburgh	£19,942	4.6
Manchester	£18,172	5.4
Bristol, City of	£14,313	4.7
Sheffield	£11,433	1.4
Liverpool	£11,334	0.6
CARDIFF	£9,933	5.7
Nottingham	£8,911	4.4
Newcastle upon Tyne	£7,802	2.1
Wales	£59,585	4.0
United Kingdom	£1,747,647	3.7

Source: ONS (2016 figures are provisional)

Gross Value Added (Balanced) Per Head of Population (£), 2016

Area	2016	Annual % Change
City of Edinburgh	£39,321	2.9
Manchester	£33,573	3.2
Glasgow City	£33,120	2.0
Bristol, City of	£31,513	3.6
Leeds	£28,079	1.2
CARDIFF	£27,480	4.5
Nottingham	£27,393	2.3
Newcastle upon Tyne	£26,317	0.8
Liverpool	£23,389	-0.6
Birmingham	£22,871	3.0
Sheffield	£19,870	0.4
Wales	£19,140	3.5
United Kingdom	£26,621	2.9

Source: ONS (2016 figures are provisional)

In terms of trends, Cardiff's GVA per head has consistently exceeded the UK average since 1998. Although the gap gradually declined following a 2007-peak, in recent years it has again diverged away from the national figure.

In 2016, the GVA per hour worked was £28.8 for Cardiff and Vale of Glamorgan. This was only 88.5% of the UK figure and made it a mid-level performer across the major UK NUTS3 areas. GVA per filled job (£45,157) for 2016 compared even less favourably with it only exceeding the Nottingham, Sheffield, and Tyneside regions, and was just 85.8% of the UK figure.

Enterprise

In 2016, there were 1,780 new enterprises in Cardiff, equating to 49.3 births per 10,000 residents. Although this exceeded the rate for Wales (38.9 per 10,000), it was below the UK average (63.1 per 10,000) as well as many of the major cities, in particular Manchester (119.1 per 10,000). The number of new enterprises per 10,000 residents in Cardiff has consistently been below the UK rate and, in contrast to the national figure, has declined since 2014.

Births of New Enterprises, 2016

Area	Births of New Enterprises	Population (Mid-2016)	Births per 10,000 Population
Manchester	6,445	541,319	119.1
Birmingham	9,200	1,128,077	81.6
Bristol, City of	2,920	455,966	64.0
Leeds	4,820	781,087	61.7
Edinburgh, City of	2,915	507,170	57.5
Liverpool	2,670	487,605	54.8
Glasgow City	3,290	615,070	53.5
CARDIFF	1,780	361,168	49.3
Nottingham	1,480	324,779	45.6
Sheffield	2,525	574,050	44.0
Newcastle upon Tyne	1,265	293,713	43.1
Wales	12,115	3,113,150	38.9
United Kingdom	414,355	65,648,054	63.1

Source: Business Demography/Mid-Year Population Estimates, ONS

Visitor Economy

Data for 2017 showed that 22 million people visited Cardiff with an economic impact of £13.2bn. Between 2007 and 2017, both the number of visitors to Cardiff and their expenditure in the city has followed an upward trend, reflecting the increasing contribution the visitor economy is making towards the city's economic performance.

No. Visitors to Cardiff and Expenditure for Cardiff, 2007 - 2017

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total spend (£m)	757	817	889	1,038	1,094	1,129	1,133	1,172	1,252	1,240	1,325
Staying Visitor (m)	1.4	1.5	1.6	1.7	1.8	1.9	1.9	2.0	2.0	2.0	2.1
Visitors (£m)	12.1	13.0	14.7	18.3	18.4	18.9	19.0	19.5	20.5	20.4	22.0

Source: Steam Data

Whilst there has been an overall positive trend in terms of visitor numbers and spend, Cardiff still lags behind many UK cities and towns in terms of attracting international visitors.

International visits, nights and spending in the top 20 UK towns 2017 Ranked by Spend

	Visits (1000s)	Nights (1000s)	Spend (£mil)
London	19,828	114,016	13,546
Edinburgh	2,015	11,240	1,019
Manchester	1,319	8,230	668
Liverpool	839	3,658	358
Birmingham	1,117	5,300	349
Glasgow	787	4,006	319
Oxford	536	3,243	268
Brighton / Hove	491	3,407	214
Cambridge	519	3,098	212
Bristol	602	3,842	200
Bournemouth	164	1,752	132
Newcastle-upon-Tyne	297	2,286	125
Cardiff	372	1,736	120
Bath	361	1,914	118
Leeds	294	1,708	117
Aberdeen	276	1,814	112
Nottingham	267	2,535	106
Sheffield	155	2,431	101
York	289	1,087	97
Inverness	311	1,418	95

Source: Office for National Statistics

Commuting Data

Around 90,000 people commute into Cardiff each day with the city receiving a net daily inflow of 56,100 people, comprised of a daily inflow of 88,700 commuters and an outflow of 32,600.

In-commuting to Cardiff by Area, 2017

Vale of Glamorgan	21,600
Rhondda Cynon Taf	18,900
Caerphilly	11,600
Newport	7,200
Bridgend	7,100
Other outside Wales	5,100
Torfaen	3,500
Merthyr Tydfil	2,900
Monmouthshire	2,800
Swansea	2,500
Neath Port Talbot	2,500
Blaenau Gwent	1,100
Other	2,000

Source: Welsh Government

Qualifications

Almost half (48.0%) of Cardiff's population aged 16 to 64 are qualified to NVQ4+, significantly above the comparative figures for Wales (35.1%) and the UK (38.4%). In addition, only one-in-fifteen (6.6%) have no qualifications. These figures compare well with other major cities.

Qualifications (Aged 16 to 64), Jan - Dec 2017

Area	NVQ4+	NVQ3 only	Trade Apprenticeships	NVQ2 only	NVQ1 only	Other Qualifications (NVQ)	No Qualifications (NVQ)
Edinburghf	57.8	10.8	5.3	8.7	7.1	7.2	3.2
Bristol	54.2	15.0	2.1	10.7	8.2	4.6	5.1
CARDIFF	48.0	17.4	1.7	14.9	7.0	4.4	6.6
Glasgow City	46.3	11.8	2.5	12.4	7.4	7.1	12.4
Sheffield	41.7	15.5	3.1	15.6	10.6	5.0	8.5
Manchester	39.9	17.0	3.3	12.5	9.5	6.6	11.1
Newcastle	37.3	22.5	2.4	15.2	7.7	5.9	9.0
Leeds	36.4	17.2	3.1	15.3	10.9	6.0	11.2
Liverpool	35.0	15.9	2.5	18.3	10.4	4.7	13.1
Birmingham	31.4	18.4	1.2	14.4	11.2	10.8	12.6
Nottingham	30.1	21.4	2.8	14.2	9.6	8.9	12.9
Wales	35.1	17.8	3.4	17.9	11.2	6.0	8.7
United Kingdom	38.4	17.0	3.2	16.0	10.7	6.8	8.0

Source: Annual Population Survey, ONS

Since 2004, the qualification levels of the Cardiff population aged 16 to 64 have improved and compared favourably with those of Wales and the UK. The proportions qualified to NVQ4+ and NVQ2+ have increased over the period, while the percentage with no qualifications has declined.

Income and Earnings

In 2017, the median gross weekly earnings of Cardiff residents working full-time were £538.5, up 0.8% on the previous year. This exceeded the earnings of most other major cities although, as has been the case since 2012, it was below the UK average.

Median Gross Weekly Earnings of Full-Time Workers, 2017 (Resident Analysis)

Area	Earnings (£)	Annual Percentage Change (%)
Edinburgh, City of	583.8	4.3
Bristol, City of	539.9	3.0
CARDIFF	538.5	0.8
Leeds	536.6	1.6
Newcastle upon Tyne	532.5	4.6
Sheffield	524.0	3.9
Birmingham	523.0	5.7
Glasgow City	519.7	-0.5
Liverpool	509.2	2.5
Manchester	479.1	1.6
Nottingham	450.6	0.5
Wales	505.9	1.3
United Kingdom	550.4	2.2

Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

The gross weekly earnings of full-time workers working in Cardiff was £528.8 in 2017. In contrast to the resident analysis, this compared poorly with other major cities and was the only core city to see earnings fall since the previous year (see Table 4). In addition, it has predominantly been below the UK figure since 2011, with the gap between the two increasing over the year (see Figure 9).

Median Gross Weekly Earnings of Full-Time Workers, 2017 (Workplace Analysis)

Area	Earnings (£)	Annual Percentage Change (%)
Edinburgh, City of	598.5	5.1
Manchester	570.8	4.3
Glasgow City	560.8	2.6
Newcastle upon Tyne	554.2	6.8
Birmingham	549.4	1.0
Bristol, City of	545.3	1.6
Leeds	543.4	2.2
Liverpool	530.7	2.3
CARDIFF	528.8	-0.9
Sheffield	526.6	2.9
Nottingham	494.8	3.1
Wales	498.4	1.0
United Kingdom	550.4	2.2

Source: Annual Survey of Hours and Earnings, ONS (provisional data for 2017)

Gross Disposable Household Income per Head

In 2016, Cardiff's gross disposable household income per head (£16,769) compared fairly well with other major cities. Since 1997, it has followed an upward trend and has consistently been above that of Wales. However, it has remained below the UK figure with the gap increasing over time.

Gross Disposable Household Income (GDHI) Per Head, 2016

Area	GDHI Per Head (£)
Edinburgh, City of	21,837
Bristol, City of	17,633
Leeds	16,814
CARDIFF	16,769
Newcastle upon Tyne	16,180
Glasgow City	15,311
Sheffield	15,057
Liverpool	14,538
Birmingham	14,093
Manchester	13,184
Nottingham	12,232
Wales	15,835
United Kingdom	19,432

Source: ONS (2016 figures are provisional)

Employee jobs with hourly pay below the Real Living Wage

The Living Wage is based on the amount an individual needs to earn to cover the basic costs of living. However, in contrast to the national minimum wage, it is not a legally enforceable minimum level of pay. In 2017, the Living Wage Foundation's living wage was £9.75 for those working within London and £8.45 for those working elsewhere in the UK.

In 2017, just over a fifth (20.7%) of employee jobs in Cardiff had an hourly rate of pay below the Living Wage. This is amongst the lowest levels in Wales and is below the UK level, but is a mid-ranking position against Core Cities.

Employee jobs with hourly pay below the living wage

LA	2016 %	2017 %
Birmingham	21.9	20.8
Bristol, City of	15.6	14.4
CARDIFF	19.2	20.7
City of Edinburgh	15.6	14.0
Glasgow City	17.8	14.6
Leeds	20.0	19.4
Liverpool	23.6	22.3
Manchester	18.0	15.2
Newcastle upon Tyne	21.1	18.4
Nottingham	24.3	23.1
Sheffield	22.5	21.7
Wales	25.1	24.7
UK	23.2	22.0

Source: Office for National Statistics

Employee jobs with hourly pay below the living wage

LA	2016 %	2017 %
Blaenau Gwent	34.1	33.0
Bridgend	23.3	26.2
Caerphilly	22.4	20.2
CARDIFF	19.2	20.7
Carmarthenshire	27.5	23.0
Ceredigion	27.8	21.9
Conwy	33.4	30.5
Denbighshire	24.0	27.2
Flintshire	23.9	27.2
Gwynedd	31.1	32.2
Isle of Anglesey	25.2	31.3
Merthyr Tydfil	27.2	27.4
Monmouthshire	24.4	22.2
Neath Port Talbot	21.3	21.0
Newport	23.3	21.7
Pembrokeshire	31.6	32.7
Powys	32.2	26.2
Rhondda Cynon Taf	27.0	23.6
Swansea	27.8	24.2
Torfaen	18.4	21.8
Vale of Glamorgan	23.0	27.5
Wrexham	27.8	28.0
Wales	25.1	24.7
UK	23.2	22.0

Source: Office for National Statistics

Inclusive Growth

Consideration of the Cardiff economy as a whole does not tell the complete picture. Economic outcomes are different according to your gender, ethnic background, or the community you live in. Employment rates show that almost eight out of ten working age white males are in employment in Cardiff, whereas less than half of working age ethnic minority females are in employment.

Employment rate (%) - aged 16-64 (2017)

White	74.8
White males	77.9
Ethnic minority males	71.2
White females	71.6
Ethnic minority females	47.3
Ethnic minority	59.0

Source: Annual Population Survey

Disabilities also impact significantly on economic outcomes in Cardiff, with employment rates for those suffering from disabilities being under half of the working age population.

Employment rate (%) - aged 16-64 (Apr 2017-Mar 2018)

Equality Act (EA) core or work-limiting disabled	45.2
EA core disabled	43.7
Work-limiting disabled	34.0
Not EA core or work-limiting disabled	78.5
All aged 16-64	72.0

Source: Annual Population Survey

Where you live in Cardiff will also have an impact on economic outcomes. The worst performing ward in Cardiff in terms of unemployment claimants, Ely, has 18 times the proportion of working age residents claiming unemployment benefits than the best performing ward, Lisvane. Notably there is little relationship between unemployment and volume of jobs provided within the wards, with fewer employee jobs to be found in Lisvane than any other Cardiff ward bar one according to the Business Register and Employee Survey

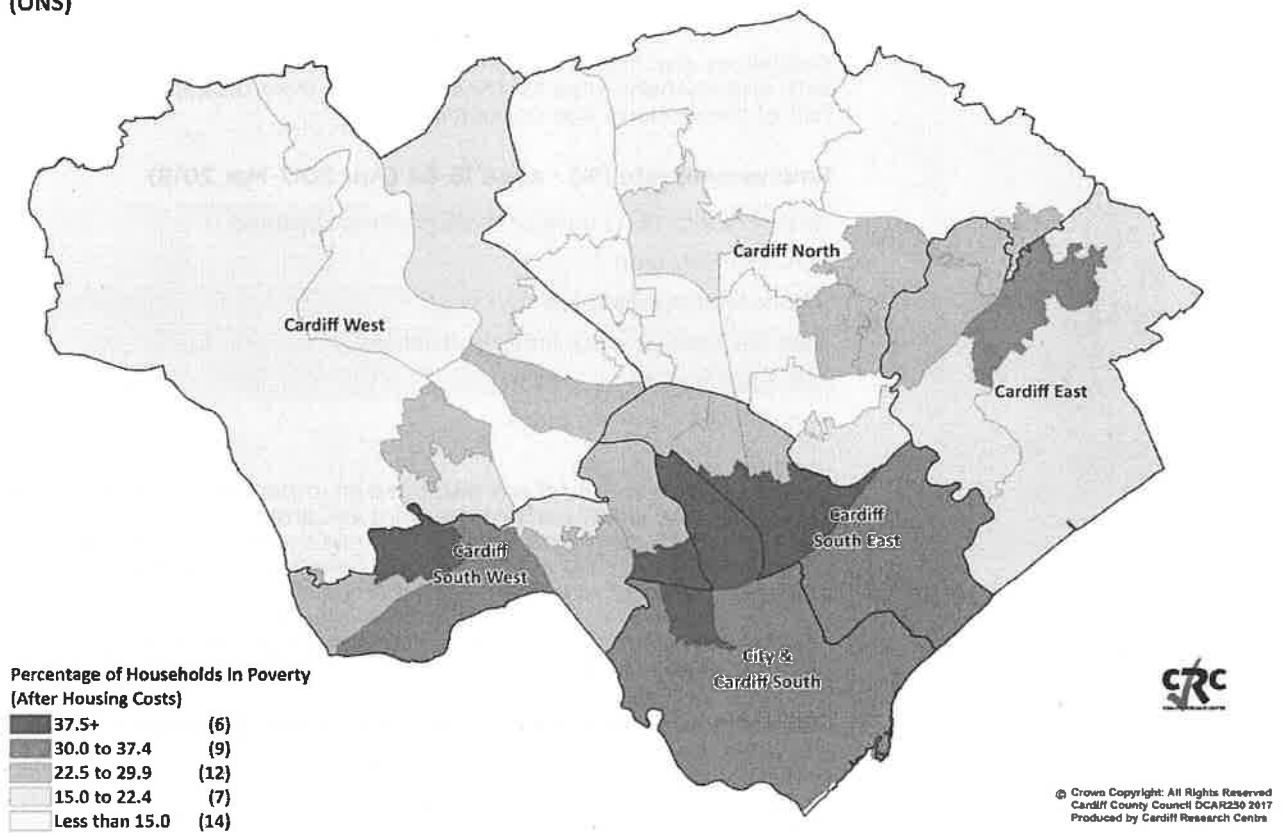
Claimants as a proportion of residents aged 16-64 (August 2018)

Ely	5.4	Llanishen	1.5
Adamsdown	4.8	Penylan	1.5
Splott	4.4	Whitchurch and Tongwynlais	1.5
Caerau	4.2	Pentyrch	1.3
Trowbridge	3.8	Gabalfa	1.1
Riverside	3.7	Llandaff	1.0
Fairwater	3.5	Pontprennau/Old St. Mellons	1.0
Llanrumney	3.5	Creigiau/St. Fagans	0.9
Pentwyn	3.1	Heath	0.9
Grangetown	3.2	Cathays	0.8
Plasnewydd	3.2	Rhiwbina	0.8
Llandaff North	3.1	Cyncoed	0.7
Butetown	2.9	Radyr	0.7
Rumney	2.7	Lisvane	0.3
Canton	2.4	All Cardiff	2.5

Source: Claimant Count

Around a quarter of the city's households have income of below 60% median income after housing costs. However this only tells part of the story. The concentration of poverty in Cardiff is heavily weighted towards the 'Southern Arc'.

Percentage of Households in Poverty (i.e. Below 60% of Median Income) After Housing Costs by MSOA, 2013/14 (ONS)



Percentage of people living in households in material deprivation
(National Indicator 19) (National Survey)

Household material deprivation, by local authority, 2016-17

	Household in material deprivation %
Blaenau Gwent	19
Bridgend	11
Caerphilly	15
CARDIFF	16
Carmarthenshire	15
Ceredigion	12
Conwy	13
Denbighshire	16
Flintshire	15
Gwynedd	14
Isle of Anglesey	16
Merthyr Tydfil	21
Monmouthshire	12
Neath Port Talbot	16
Newport	14
Pembrokeshire	12
Powys	12
Rhondda Cynon Taf	19
Swansea	18
Torfaen	15
Vale of Glamorgan	12
Wrexham	13
Wales	15

Source: Stats Wales

Cardiff's Industrial Strengths

In responding to the UK's Industrial Strategy it is important that Cardiff can outline its economic strengths and opportunities, as well as where we can support the economy to become more innovative and productive.

It is clear that Cardiff offers a lot to the national, regional and city-region economies. However it is also clear that it can deliver a lot more. Specifically the city has a skilled and resourceful labour market, with emerging clusters in creative and digital, reg-tech and fin-tech, life sciences and emerging technology such as compound semi-conductors.

Through exploiting this potential Cardiff has the potential to significantly improve levels of productivity, both contributing to the growth of the city, the city-region and national economies, whilst also increasing earnings for local workers and providing a greater range and choice of jobs for the residents of the Cardiff Capital Region.

We have the necessary tools...	...but we are not converting our potential
<ul style="list-style-type: none"> • Highly qualified workforce • Over 65,000 higher education students • HE reputation for commercialisation of research • Established city-region • Service sector with exporting perspective • Strong TV and broadcast sector • Concentration of 'reg-tech' and cyber security skills • Competitive fin-tech and digital start-up community • Emerging technology clusters, including compound semi-conductors • Internationally prominent life-sciences businesses • Strong quality of life offer 	<ul style="list-style-type: none"> • Low levels of productivity across all sectors • Knowledge base not being fully exploited • Prevalence of low value activity in business sectors • Lack of recognised brand • City centre dominated by retail • Need for infrastructure investment in both transport and digital connectivity

Higher Education

Cardiff is home to almost 70,000 students studying at three universities: Cardiff University, Cardiff Metropolitan University and the University of South Wales which between them offer three business schools and three law schools. The city's universities attract talent from around the world, with 1 in 4 students being international students.

Enrolled Students by Institution

	Enrolled Students 2016/17
Cardiff Metropolitan University	10,995
University of South Wales	23,465
Cardiff University	31,595

Source: StatsWales

Cardiff University is a member of the Russell Group of leading research universities and has a strong reputation for the quality of its teaching and research. 31,500 students, including more than 4,000 from over 100 countries outside the UK, help to create a vibrant, cosmopolitan community.

The university is ranked top 5 UK University for research quality and impact in the most recent Research Excellence Framework (REF 2014) with 87% of research assessed as world-leading or internationally excellent. The School of Engineering is ranked no.1 in the UK for research impact (REF 2014) and has developed strong links with industry.

Cardiff Metropolitan University is a growing university with business and management a key strength. Its career-orientated courses make graduates popular with employers.

Cardiff Metropolitan's specialisms are focused around its five schools, namely Cardiff School of Management, Cardiff School of Art & Design, Cardiff School of Education, Cardiff School of Health Sciences, and Cardiff School of Sport. In addition, the National Centre for Product Design and Development Research (PDR) provides expertise in design and innovation, offering support to manufacturing businesses.

In the recent Research Excellence Framework results, Cardiff Metropolitan University was ranked as the highest post-1992 'modern' university, with 80% of the University's overall quality profile rated as world leading or internationally excellent.

The **University of South Wales** is one of the largest universities in the UK with 17,000 undergraduates and is renowned for its partnership with major employers in the region.

The university has established a Centre for Financial and Professional Services in Cardiff, working with the Welsh Government to meet the city's demand for skills in the growing financial and professional services sector.

With specialisms in the cyber security, creative industries, sustainable energy, and mobile communications, many lecturers at the University of South Wales are producing research which is contributing to advances within their field of expertise. The latest Research Excellence Framework results rated half of the university's research as either world-leading or internationally excellent.

Innovation

As a result of its skilled workforce and higher education base, the city has a relatively innovation focussed economy, exemplified by proportionally high numbers of patent applications and a high proportion of skilled jobs focussed on exporting.

city	Patent Applications 2015 (per 100,000 of population)
Bristol	34.7
Nottingham	18.1
Cardiff	16.8
Newcastle	15.3
Sheffield	13.2
Manchester	13.2
Leeds	12.5
Liverpool	10.1
Glasgow	10.0
Birmingham	8.2

Source: Centre for Cities Analysis

City	High skilled share of export jobs
Bristol	51%
Cardiff	49%
Leeds	47%
Manchester	43%
Newcastle	40%
Nottingham	40%
Liverpool	38%
Birmingham	38%
Sheffield	37%

Source: Centre for Cities Analysis

Sector Strengths

Creative and Digital Sector

Cardiff has become the hub of Wales' creative industries sector, with particular strengths in broadcasting, TV and film production. A significant concentration of creative companies are attracted to Cardiff due to the presence of major broadcasters, such as the BBC, ITV, S4C, and the city's academic excellence.

Pinewood Studios Wales has founded a base in Cardiff, adding to established studios including the BBC Drama Village. Located in Cardiff Bay, the 170,000 sqft facility, including nine studios equivalent in length to three football pitches is now the purpose-built home of four flagship BBC dramas - Casualty, Doctor Who, Pobol y Cwm, and Sherlock.

BBC Wales has invested in a new Foster & Partners designed regional headquarters at Central Square. The statement building is the centre piece of a new destination for the creative sector in the heart of the city centre. Cardiff University's new School of Journalism has relocated immediately next to the new BBC HQ.

As well as being a prime location for major players in the creative sector, Cardiff is also home to a growing creative start-up community that has been increasing in size and confidence. The city benefits from a wide variety of incubation space for the creative industries, from the newly developed Gloworks in the heart of Cardiff Bay, Tramshed Tech and Indycube as well as space in the city's established Cardiff Business Technology Centre.

- Cardiff is one of the UK's fastest growing creative sectors outside of London
- Employs over 16,000 people
- Around a third of all Welsh creative industry jobs are based in Cardiff
- 3000 creative businesses in Cardiff
- Home to triple Emmy Award production Sherlock as well as leading BBC prime time production Dr Who and Casualty
- 98.43% penetration of superfast broadband boosted by an Internet Exchange in the heart of the city
- The creative industry sector is the fastest growing sector in Wales with employment increasing 58% between 2005 and 2018
- Renowned universities with 7,000 creative industries graduates each year in subjects including animation, visual effects, digital and mobile technology development, fashion and fine art
- Contributes over £1bn of GVA to the city's economy each year

There is already support in the sector. University of South Wales' Faculty of Creative Industries is one of the largest in the UK. The school runs 33 undergraduate courses with around 3,000 students. Cardiff University's School of Journalism, Media and Culture has a world leading reputation for its industry-facing research and training. The school houses the Centre for Community Journalism, the UK's leading network centre for 400 community and hyperlocal news outlets across the UK. Cardiff Metropolitan University's School of Art & Design is home to 1,200 students with subjects including Animation, Fashion Design, Fine Art, Graphics and Illustration. All of them undertake live projects with industry.

Another initiative of the school is Creative Cardiff a network of 1,750 creative companies and freelancers. Creative Cardiff brings industry and academics together on initiatives including research and sector mapping, co-working spaces and international networks.

Life Sciences

The fast-moving Life Sciences sector in the Cardiff Capital Region is diverse, research-driven and categorised by global enterprises including Norgine, Biomet, GE Healthcare, Convatec and Johnson & Johnson Innovation.

The sector is well supported by the region's universities which are home to world leading research expertise with a strong commercial outlook. As well as facilities such as the Cardiff Medicentre (a medical technology incubator on the site of University Hospital Wales), there has also been significant investment in Life Sciences Hub Wales, based in Cardiff Bay, which is a nerve centre for academic and healthcare organisations, business, expert advisers, clinical and funding organisations. The Hub seeks to stimulate interaction, innovation, networking and collaboration, making the link between ideas and commercialisation a reality and providing a commercially-driven resource for the sector.

In comparison with the UK's Core Cities, Cardiff has a broad range of businesses within life sciences. A greater proportion of people are employed in Cardiff in the manufacture of irradiation, electromedical and electrotherapeutic equipment, medical and dental instruments, supplies and pharmaceutical preparations than the UK average.

- The sector and related industries employ 17,000 people in the city (Business Register and Employment Survey 2016)
- The Cardiff Capital Region is home to one of the world's top five world diagnostic companies in Ortho Clinical Diagnostics, the £4 million Welsh Wound Innovation Centre, ReNeuron, the first company to carry out clinical trials of stem cells in stroke patients and leading European specialist pharmaceutical company Norgine
- Cardiff University is the base for Sir Martin Evans, Nobel Prize Winner for discovery of embryonic stem cells, and has an MRC Centre for Neuropsychiatric Genetics and Brain Imaging Research Centre (CUBRIC)

Compound Semi-Conductors

The compound semi-conductors sector is developing a cluster of international standing in South East Wales. Anchored by IQE, and supported by both City Deal investment and Cardiff University expertise, there is ambition to establish the cluster and the globe's premier location for the future development of a technology that will be fundamental to the growth of the digital sector.

To date almost 700 businesses have been identified as part of the cluster in South East Wales and South West England, benefitting from increasing levels of FDI, as well as the development of the city's home-grown businesses.

Overall, wider sector support is provided by:

- The Institute of Compound Semiconductors
- The Compound Semiconductors Centre
- The Compound Semiconductors Manufacturing Hub
- The Compound Semiconductors Applications Catapult.

Already the Cardiff Capital Region has made a £40m commitment to the development of a compound Semiconductor Industrial cluster in the region, with the aim to develop a cluster that will:

- Leverage £375m of private sector investment,
- Create up to 2,000 high skilled jobs,
- Return the investment for use on other regional schemes, and
- Create hundreds more jobs in the wider supply chain cluster

The cluster is intended on supporting a wide range of service sector and manufacturing activities across the entire city-region, which already has established concentrations of enterprise in areas such as instrumentation and communication equipment.

Financial Services and Reg-Tech

In comparison with the UK's other Core Cities, a broad range of businesses within the financial services sector are represented in Cardiff. Welsh government research states that Cardiff is the preferred location for contact and shared service centres in the UK and the city has a growing reputation in outsourced HR, legal and other corporate services. The flourishing financial sector is dominated by banks and building societies, with an increasing number of insurance and pension companies making Cardiff their home. Employment in insurance is significantly above the UK average, with the proportion of people employed in life insurance seven times greater than the UK average.

A number of globally recognised financial services companies, some of the UK's biggest accountancy firms as well as home-grown companies have expanded their operation in Cardiff over recent years, all supported by higher education in the city that not only provides a steady stream of skilled graduates, but also works closely with business to design and shape future courses for the sector.

More recently Cardiff has experienced growth in its fintech sector, with businesses such as Wealthify, a new online investment service, and Delio, which provides technology support for financial services businesses, choosing Cardiff as their base.

The sector has also recently developed a reputation in 'Reg-tech' and cyber security. These sectors are supported by higher education institutions, public sector organisations and competitive businesses, including the establishment of a National Cybersecurity Academy

The presence of numerous government bodies already in the wider South Wales region has created the foundations of a highly skilled, digitally-adept and technically proficient workforce. These bodies include core ministerial and non-ministerial departments such as DWP and HMRC, but also more specialised agencies including the DVLA, Companies House, the Intellectual Property Office and the Office for National Statistics.

Role of the City Centre

Of the Core Cities, Cardiff has the smallest city centre by radius. The expansion of the city-centre into Central Quay, Callaghan Square and Dumballs Road will see Cardiff join the rest of the UK's Core Cities in terms of city centre size. Analysis shows that Cardiff also lags the better performing cities in terms of the proportion of its city centre space dedicated to office and non-retail development.

The introduction of more office and non-retail commercial development in the city-centre is seen as critical in exploiting the benefits of agglomeration and cluster development.

City Centre Spatial Analysis

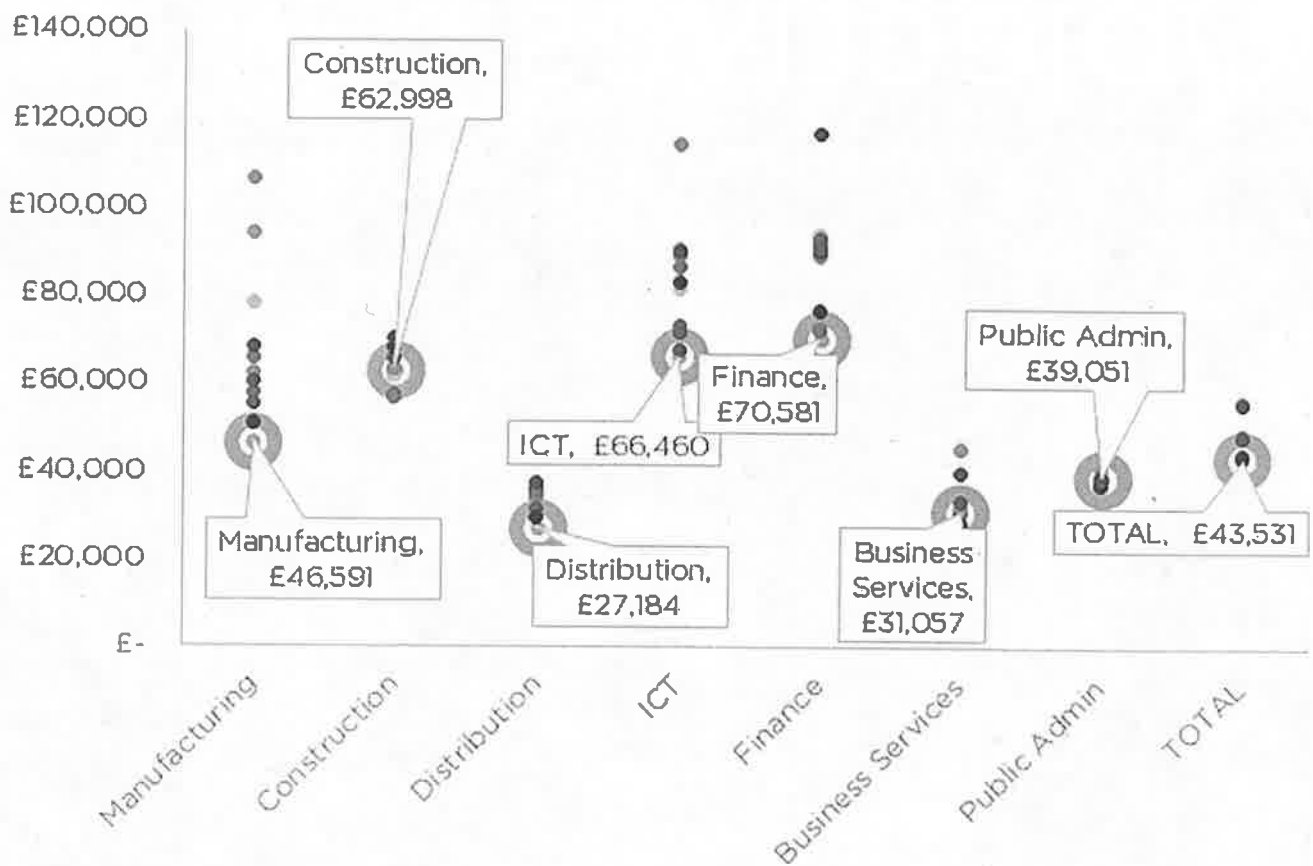
	City Centre Office	City Centre Retail	City Centre Size	radius of city centre (miles)
London	76%	11%	London	2
Birmingham	40%	19%	Large	0.8
Bristol	51%	20%	Large	0.8
Leeds	52%	21%	Large	0.8
Liverpool	45%	29%	Large	0.8
Manchester	55%	21%	Large	0.8
Newcastle	43%	35%	Large	0.8
Nottingham	35%	32%	Large	0.8
Sheffield	38%	24%	Large	0.8
Cardiff	43%	38%	Medium	0.5

Source: Centre for Cities

Productivity

Despite its industrial strengths, Cardiff's productivity lags many of the UK's Core Cities, and overall productivity is £12,000 less than the UK per worker average. Analysis shows that this isn't down to sector mix, rather it is within sector productivity that drives these differentials.

Cardiff Sector Productivity V Core Cities



A city approach to supporting the development of key sectors of potential, through a mixture of interventions, is seen as their primary tool for improving overall city productivity.

Economic Objectives

Cardiff's Well-being Plan sets the city's priorities for action between the city's public and community services, and with the citizens of Cardiff. The Plan contains Well-being Objectives, high-level priorities that the Cardiff Public Service Board has identified as being most important. Given the partnership approach that will take forward the Economic White Paper it is considered appropriate that the city-wide partnership objectives established should be adopted.

In addition the Council's Corporate Plan identifies further objectives around the visitor economy and investment. Added to the original Green Paper objective, the following Key Performance Indicators will be considered:

- GVA per head
- Jobs Growth
- Unemployment rate
- Visitor Spend
- Gross Disposable Household Income per head
- The amount of 'Grade A' office space committed to in Cardiff (sq. ft.)
- Employee jobs with hourly pay below the living wage
- Percentage of population aged 16-64 qualified NVQ4+
- Earnings (Weekly Resident FT Gross)
- Employment Rate (Female as % of all)
- Employment Rate (BAME as % of all)
- Employment Rate (EA core disabled as % of all)
- Percentage of households in poverty
- Long-term JSA Claimants

Economic Indicators Summary

	Cardiff	Wales	UK	Core City Rank
GVA per head (2016)	£27,480	£19,140	£26,621	5 th
Jobs Growth (2017-2018)	6.0%	0.7%	1.2%	5 th
Unemployment rate (Dec 2017)	6.1%	4.8%	4.4%	4 th
Visitor Spend (2017)	£1,325m	n/a	n/a	n/a
Gross Disposable Household Income per head (2016)	£16,769	£15,835	£19,432	3 rd
The amount of 'Grade A' office space committed to in Cardiff (sq. ft.)		n/a	n/a	n/a
Employee jobs with hourly pay below the living wage (2017)	20.7%	24.7%	22.0%	5 th
Percentage of population aged 16-64 qualified NVQ4+ (2017)	48.0%	35.1%	38.4%	2 nd
Earnings (2017 Weekly Resident FT Gross)	£538.5	£505.9	£550.4	2 nd
Employment Rate (Female as % of all)	67.4%	69.0%	70.3%	5 th
Employment Rate (BAME as % of all) Apr 2017-Mar 2018	59.0%	60.5%	64.8%	2 nd
Employment Rate (EA core disabled as % of all) Apr 2017-Mar 2018	43.7%	45.2%	50.8%	6 th
Percentage of households in poverty	16%	15%	n/a	n/a
Long-term JSA Claimants	56%	42%	42%	3 rd





**ECONOMY AND CULTURE SCRUTINY COMMITTEE
RESPONSE TO THE REBUILDING MOMENTUM: A GREEN
PAPER ON THE FUTURE OF CARDIFF'S ECONOMY**

On the 18th March the Economy and Culture Scrutiny Committee held a workshop to discuss Cardiff Council's economic vision Green Paper 'Rebuilding Momentum'. The Committee were provided with information on *Cardiff: Economic Performance*, the *Core Area Masterplan*, and discussed the new approach that was to be adopted. The following responses were provided in line with the consultation structure.

Q1. What do you think the city's priorities for economic development should be?

In discussing the potential economic development priorities the Committee noted the analysis provided by the Head of Economic Development.

It is clear that periodic economic recession, the unpredictable rise of major competitors elsewhere, unexpected business closures, the challenges arising from technological change and globalisation highlight the importance of building Cardiff's economic resilience. The resilience of Cardiff's economic systems is affected by the interconnectedness of today's economy and the Committee are of the view that there is a need for the economic approach to foster a diverse range of sectors, a mix of businesses and jobs. This balanced approach will need to be cognisant of Welsh Government priorities relating to the Enterprise Zone.

A key area for development is that of building an entrepreneurial culture in Cardiff. The metrics provided to the Committee highlighted that this is a key area for development, and it will be important for the city to harness the creativity and talent of young people in all areas of the city and foster entrepreneurship in the classroom. In improving the values, norms and attitudes of the population of a region relating to business start-ups, the development and embracing of a culture of risk-taking without fear of failure will be important.

As noted previously the development of creative industries will need to be a key feature in the economic Vision. Whilst the percentage of the population employed in creative industries in Cardiff is high, Members would like to point out the need to further increase the size/number of jobs in the sector.

It is acknowledged that there will be significant population growth over the duration of the economic vision. Within the context of Cardiff's quality of life indices and the Local Development Plan process, improving connectivity poses a key risk for economic development going forward. Improvements to the city's transport infrastructure will be required, with particular attention needed to the issue of car use.

The presentation provided to Committee highlighted that Cardiff is well placed in terms of its population with higher level qualifications, but has challenges in terms of the quality of schools. If Cardiff is to improve economically in a balanced way, it is essential that this matter is addressed to secure a broad skilled workforce.

Members were also of the view that there is a need for the strategy to focus on job creation and the central part the Council plays in this agenda. Jobs play an important role in improving well being, social cohesion and in reducing poverty issues, and it is important that any approach considers the needs of all and fully considers the socio economic and geographical perspectives.

Q2. What do you think are the most significant challenges that Cardiff faces and what are the city's greatest opportunities?

In terms of strengths and weaknesses Members discussed the need to maximise the potential of Cardiff City Football Club's promotion to the Premiership. In addition Members discussed the potential of promoting Cardiff as a regional sporting leader in the south west of the UK. In discussing the success of Cardiff in attracting major events the Committee identified complacency as a potential challenge to overcome for the future. It was also considered important for the correct mix to be achieved, and for partners to maximise the added value (social and economic benefits) associated with major events.

Universities were also identified as a major strength in Cardiff and there is a need to maximise this strength by improving the working relationships with the Council to foster an entrepreneurial culture.

The Committee recognised the success of the developments within the city centre and highlighted as a significant challenge the need to reduce the income disparities between communities via job creation

Cardiff's role as a capital city and regional centre for economic development was highlighted as a significant opportunity, and the developing city region agenda will be important opportunity for the future. Members highlighted the need to recognise the growth of Bristol and to see Bristol's 2050 business vision as significant challenge. Relationships need to be developed to ensure that the development is achieved in both city regions.

The development of Cardiff Airport is a significant challenge facing Cardiff and its region. International connectivity is a key factor in improving Cardiff's competitiveness and it will be important for Cardiff to be mindful of the potential of developing routes to key economic hubs.

Q3. Moving forward, how do you think Cardiff should build on its recent success to position itself in the UK and internationally?

From an international perspective it is clear that the possible improvements at Cardiff Airport have the potential to link with the economic focus of the Enterprise Zone - for example focussing effort on building flight links to international financial centres.

The Committee noted that Cardiff is one of Europe's youngest capital cities. Building on the 'young and vibrant capital city' approach appears to be the correct approach going forward. The Committee was also of the view that there were other potential areas for development, including Cardiff's cultural distinctiveness and the positive aspects/distinctiveness of the devolution agenda, which could also be developed.

In discussing the marketing approach it is clear that there is a need to focus more of the resources internationally being mindful of the growth of the BRICs (Brazil, Russia, India and China) in terms of inward investment. It is essential that any approach is based on strong market intelligence and robust consultation with Cardiff businesses.

Q4. Do you agree with the key infrastructure priorities for the core area and are there other priorities the Council should consider?

The Committee approved the Cardiff Metro concept and highlighted the example of Liverpool as an example of a city with good connectivity by rail.

The Committee agreed about the need to develop a convention centre, although mixed views were expressed regarding the ideal location. It was noted that a city centre site would assist in bids for large events such as the

UEFA Champions League. However, it was noted that land ownership issues might complicate this.

Q5. Do you agree with the Council's strategy to create an Integrated Transport Hub?

The Committee were supportive of the Integrated Transport Hub and the need to progress. The Committee were mindful of the context of the developing LDP and highlighted the importance of radial transport across the city.

The Lloyd George Avenue transport proposals were discussed and supported, in particular the development of a double sided street at the heart of the public transport network. The long term need of heavy rail access into the Bay was also discussed.

Q6. Do you agree with the land use zoning and densities proposed in the master-plan and the location of key infrastructure?

The Committee were particularly pleased with the opening up of the city centre by creating new open spaces such as the canal areas. Members also highlighted the importance of community facilities/local centres in holding areas together.

Q7. How this can best be achieved including the scope of any new model that is put into place?

The importance of high quality build was raised as a key issue in delivering any model. In relation to the Lloyd George Avenue proposals lessons should be learned regarding securing quality build, and innovative methods should be employed to ensure that this happens.

In relation to the potential convention centre and the potential eastern bay link, Members discussed the need to master plan the transportation infrastructure alongside developments rather than undertaking developments and risking increased congestion.

Land ownership issues were also highlighted as a potential barrier to progress and perceived bidding issues.

The Committee were concerned that the communication around such developments needed to be handled sensitively, taking into consideration the need to avoid the perception that investment is directed to the city centre only.

Q8. How can the Council better engage with the private sector and what role should the private sector play in shaping Cardiff's economic future?

In discussing the engagement of the private sector Members discussed the Cardiff and Co as an example. There were mixed views regarding the respective benefits of an arms length company (that is common practice in other cities) or an in house approach where there may be clearer lines of responsibility, with for example the Economic Development Director leading any approach. Members also discussed the need for a co-operative approach where major private sector companies were involved.

The Committee, hope that these comments support the emerging development of the City's Economic Vision.

My Ref: T: Scrutiny/Correspondence/Cllr NH



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Date: 12 January 2018

Councillor Russell Goodway
Cabinet Member, Investment and Development
Cardiff Council,
County Hall
Cardiff
CF10 4UW

Dear Councillor Goodway,

Economy & Culture and Environmental Scrutiny Committee: 11 January 2018

Members of the Economy & Culture Scrutiny Committee have asked me to pass on their thanks to you and officers for attending Committee to brief Members on the 'Building More and Better Jobs' Green Paper.

Members note the intention is to consult on the Green Paper across the whole of the business sector and with public sector, third sector and private sector partners, including neighbouring local authorities. Members welcome this and hope that it stimulates debate on the way forward for Cardiff and our role in the region.

Members look forward to scrutinising the planned Economic Development White Paper. As part of this, Members would like to receive a summary of the consultation responses received, to go out with our committee papers for this item and ask that officers liaise with scrutiny officers to arrange this.

Yours sincerely,

**COUNCILLOR NIGEL HOWELLS
CHAIR, ECONOMY & CULTURE SCRUTINY COMMITTEE**

cc Members of the Economy & Culture Scrutiny Committee
Neil Hanratty Ken Poole
Clair James Cabinet Support Office

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**CYNGOR CAERDYDD
CARDIFF COUNCIL**

ECONOMY & CULTURE SCRUTINY COMMITTEE

9 APRIL 2019

**PRESENTATION BRIEFING: *'INFORMING A MUSIC STRATEGY FOR CARDIFF
REPORT: MUSIC ECOSYSTEM STUDY AND STRATEGIC RECOMMENDATIONS'***

Purpose of the Report

1. To set the context for Members ahead of a presentation briefing at Committee on the results of the work undertaken by Sound Diplomacy, which will be used to inform a Music Strategy for Cardiff.

Scope of Scrutiny

2. To consider the findings of the work undertaken by Sound Diplomacy, consultants whom the Council employed to investigate the music ecosystem of Cardiff and make strategic recommendations to inform the development of a Music Strategy for Cardiff.
3. This briefing will outline the next steps in developing a Music Strategy, which Members have previously indicated they wish to scrutinize prior to decision.

Structure of the meeting

4. Members will hear from Councillor Russell Goodway (Cabinet Member – Investment and Development), Neil Hanratty (Director of Economic Development) Jonathan Day (Operational Manager- Economic Policy) and Ruth Cayford (Creative Industries and Culture Manager). There will be a presentation taking Members through:
 - the findings from Sound Diplomacy's consultation exercises;
 - the key themes identified by their work; and
 - the proposed impacts in terms of direct and indirect economic impacts, events, brands and cultural impact.

5. The presentation will be followed by Members questions. Members will then be able to decide what comments, observations or recommendations they wish to pass on to the Cabinet for their consideration.

Background

6. In 2017, the Save Womanby Street Campaign successfully halted proposed re-development on Womanby Street that could have curtailed live music events taking place in long-established venues. This campaign highlighted the role of music as one of Cardiff's strongest creative industries and focused attention on the need for the Council and partners to work together to protect and enhance the infrastructure required to enable music to flourish in Cardiff.
7. In December 2017, the Leader, Councillor Huw Thomas, officially announced the development of a music strategy, at a special launch event at City Hall. He committed the Council to working with Sound Diplomacy, global leaders of the Music Cities movement with experience of assisting other local authorities in developing music strategies. This would commence with an audit of the music ecosystem in Cardiff. A copy of the Leader's speech is available at:

<https://www.creativecardiff.org.uk/creative-cardiff-news/creativity-at-heart-our-economic-strategy-councillor-huw-thomas-launches-music>

8. Following the above, the Council's Corporate Plan 2019-2022 contains the following commitment under the Wellbeing Objective – A Capital City that works for Wales:
 - Develop a sustainable events portfolio, which builds on Cardiff's event hosting credentials. This will include the development of a 'signature event' and establishing Cardiff as a Music City over the next five years.

Way Forward

9. Councillor Russell Goodway (Cabinet Member – Investment and Development) will be invited to make a statement. Neil Hanratty (Director of Economic Development), Jonathan Day (Operational Manager- Economic Policy) and Ruth Cayford (Creative Industries and Culture Manager) will attend to give a presentation and answer Members' questions.

Legal Implications

10. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

11. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations

for decision that goes to Cabinet/Council will set out any financial implications arising from those recommendations.

RECOMMENDATION

The Committee is recommended to:

- i) Consider the information in this report and the information presented at the meeting;
- ii) Determine whether they would like to make any comments, observations or recommendations to the Cabinet on this matter; and
- iii) Decide the way forward for any future scrutiny of the issues discussed.

DAVINA FIORE

Director of Governance & Legal Services

3 April 2019

**CYNGOR CAERDYDD
CARDIFF COUNCIL**

ECONOMY & CULTURE SCRUTINY COMMITTEE

9 APRIL 2019

COMMITTEE BUSINESS REPORT

Background

1. This report provides Members with:
 - i. A correspondence update;
 - ii. Details of the Cardiff Capital Region City Deal Joint Overview & Scrutiny Committee meetings held on 9 February 2019 and 28 March 2019;
 - iii. An opportunity for Members to discuss an indicative Committee Forward Work Plan May – July 2019.

Correspondence update

2. Following most Committee meetings the Chair writes a letter to the relevant Cabinet Member or officer, summing up the Committee's comments and recommendations regarding the issues considered.
3. At the Committee meeting on 17 January 2019, Members received a report detailing the correspondence sent and received up to that meeting. Since then, correspondence has been sent following the Committee meeting on 17 January 2019 and 19 February 2019.
4. The list below details the position with regard to responses to correspondence:
 - i. *Response Received*– from Councillor Russell Goodway, to the Chair's letter following scrutiny of plans to regenerate the Dumballs Road area, considered at Committee on 11 October 2018.

- ii. *Response Received*– from Councillor Bradbury and Councillor Goodway to the Chair’s letter regarding the report to Cabinet on Heritage Buildings, considered at Committee on 8 November 2018.
 - iii. *Response Received* – from Councillor Goodway to the Chair’s public letter regarding the report to Cabinet on the Indoor Arena, considered at Committee on 8 November 2018.
 - iv. *Response Received*– from Councillor Peter Bradbury and Councillor Michael Michael to the letter of Councillor Ramesh Patel, Chair of the Joint Committee meeting held on 19 November to scrutinise the Public Spaces Protection Order: Dog Controls.
 - v. *No response required* – from Councillor Peter Bradbury to the Chair’s letter regarding the leisure centre management contract with GLL, considered at Committee on 17 January 2019.
 - vi. *Response Received* – from Councillor Chris Weaver, to the Chair’s letter regarding Corporate Plan and Budgetary Proposals 2019/20, considered at Committee on 19 February 2019.
5. There are no correspondence responses outstanding. Copies of the Chair’s letters and responses received can be found on the Council’s website page for the relevant Committee meeting, with a hyperlink provided at the top of the page, entitled ‘*correspondence following the committee meeting*’.

Joint Overview and Scrutiny Committee – Cardiff Capital Region City Deal

6. At the Committee Meeting on 6 December 2018, Members requested sight of the minutes of the meetings of the Joint Overview and Scrutiny Committee (JOSC) for the Cardiff Capital Region (CCR) City Deal. The draft minutes for the first JOSC meeting, held on 15 October 2018, were circulated to Members ahead of their 17 January 2019 committee meeting.
7. The next meeting of the JOSC was held on 9 February 2019, with a further meeting held on 28 March 2019; the agenda and papers for these meetings are available at:

<https://democratic.bridgend.gov.uk/ieListMeetings.aspx?Committeed=441&LLL=0>

8. In the morning of 9 February 2019, JOSC Members toured the Compound Semi-Conductor Foundry building, near Newport, enabling Members to see the facilities and meet representatives of IQE, the company that specialises in research, development and production of compound semi-conductors and has its headquarters in St Mellons, Cardiff. IQE have over 50% of the global market share re compound semi-conductors.
9. At the meeting in the afternoon of 9 February 2019, the JOSC considered the following items:
 - a. Compound Semi-Conductor Foundry Project
 - b. Joint Working Agreement Business Plan
 - c. Forward Work Programme, Training and Schedule of Meetings.
10. At the meeting Members:
 - a. Requested that a Confidential Briefing report on IQE and its share price be shared with CCRCD JOSC Members, on a confidential basis;
 - b. Requested a detailed breakdown on new jobs created and those that would be safeguarded as a result of investment from the CCRCD. Members also asked for a timeline for creation of the additional jobs;
 - c. Noted the JWA Business Plan;
 - d. Proposed adding the following items to their Forward Work Programme:
 - i. Education – how to ensure young people have access to the opportunities arising from CCRCD
 - ii. Marketing & Advertising IQE to customers and local communities, to ensure they are aware of local opportunities;
 - e. Discussed the future scrutiny of the South Wales Metro and received advice that this scrutiny should be undertaken jointly with the Welsh Government and the Transport Authority and that Welsh Government would be expected to lead on this;

- f. Recommended that the CCRCD Joint Cabinet revisit and reconsider the budget allocated to joint scrutiny, to allow Members greater flexibility to carry out their role and have additional meetings as the need arose;
 - g. Requested training on the role of a Joint Overview and Scrutiny Committee Member and for Joint Scrutiny Chair training to be arranged for the Chair and Vice Chair of JOSOC.
11. In the morning of 28 March 2019, JOSOC Members were able to attend a training session, which covered the role of a Joint Overview and Scrutiny Committee Member, effective joint scrutiny and how to use these to enhance shared outcomes.
12. At the meeting in the afternoon of 28 March 2019, the JOSOC approved the minutes for the meeting on the 9 February 2019 and considered the following items:
- a. Wider Investment Plan
 - b. Forward Work Programme, Training and Schedule of Meetings
 - c. Compound Semi-Conductor Project: The Protection of City Deal funds (*confidential item*).
13. The minutes from the meeting on 28 March 2019 are being prepared and will be circulated to Committee Members when available.

Committee Forward Plan

14. As part of the Council's response to the Wales Audit Office report '*Overview and Scrutiny - Fit for the Future?*' (July 2018), the Head of Democratic Services has introduced publication of the Committee's "Forward Work Plan" (FWP) on the Council's internet site. These have been published for October

2018 – January 2019 and January 2019 – April 2019, on the Council's internet site, under the Forward Plan heading.¹

15. The next published FWP will cover the period May 2019 – July 2019. At this meeting, Members are asked to consider the information set out in **Appendix A** and agree for this to be published, subject to any amendments agreed at this meeting. This is an indicative FWP, subject to change following the appointment of a new Committee at Council's Annual General Meeting in May 2019.
16. Members are requested to note that the Libraries Strategy is shown in both May and June 2019. The consultation period on the proposals commences early May, with a decision report proposed for Cabinet in June. Members are asked to consider the approach they wish to take to this scrutiny i.e. policy development scrutiny, pre-decision scrutiny or both.

Way Forward

11. During their meeting, Members will have the opportunity to reflect on the correspondence update, note the update provided re the Joint Overview and Scrutiny Committee Cardiff Capital Region City Deal meetings on 9 February 2019 and 28 March 2019 and discuss the information provided in **Appendix A** and agree any amendments.

Legal Implications

12. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct legal implications. However, legal implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out

¹ Available at: <http://cardiff.moderngov.co.uk/mgListPlans.aspx?RPId=142&RD=0&LLL=0>

any legal implications arising from those recommendations. All decisions taken by or on behalf of the Council must (a) be within the legal powers of the Council; (b) comply with any procedural requirement imposed by law; (c) be within the powers of the body or person exercising powers on behalf of the Council; (d) be undertaken in accordance with the procedural requirements imposed by the Council e.g. Scrutiny Procedure Rules; (e) be fully and properly informed; (f) be properly motivated; (g) be taken having regard to the Council's fiduciary duty to its taxpayers; and (h) be reasonable and proper in all the circumstances.

Financial Implications

13. The Scrutiny Committee is empowered to enquire, consider, review and recommend but not to make policy decisions. As the recommendations in this report are to consider and review matters, there are no direct financial implications at this stage in relation to any of the work programme. However, financial implications may arise if and when the matters under review are implemented with or without any modifications. Any report with recommendations for decision that goes to Cabinet/Council will set out any financial implications arising from those recommendations.

RECOMMENDATIONS

The Committee is recommended to:

- I. Reflect on the update on committee consultation;
- II. Note the update provided on the Joint Overview and Scrutiny Committee for Cardiff Capital Region City Deal meetings on 9 February 2019 and 28 March 2019; and
- III. Consider the updated Committee Forward Work Plan attached at **Appendix A**, agree any amendments required and approve for publication on the Council's internet.

Davina Fiore

Director - Governance and Legal Services

3 April 2019

ECONOMY & CULTURE SCRUTINY COMMITTEE – INDICATIVE FORWARD WORK PLAN

May – July 2019

If you would like to share your experiences or views regarding the items being considered please contact:

Scrutinyviewpoints@cardiff.gov.uk

Title and Description of Report	Invitees	Contact Officer
Meeting Date: 9 May 2019		
<p>Library Strategy To carry out policy development scrutiny of the draft Library Strategy, as part of the consultation process.</p>	<ul style="list-style-type: none"> • Cabinet Member, Housing & Communities • Assistant Director – Housing & Communities • Lead Library & Strategy Manager 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Cardiff Harbour Authority To scrutinise the impact of the Welsh Government review of funding for the Cardiff Harbour Authority and consider how the impact will be managed.</p>	<ul style="list-style-type: none"> • Cabinet Member – Culture & Leisure • Director of Economic Development • Operational Manager – Harbour Authority • Welsh Government representative & Local Partnership representative - who undertook review 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Multi-Purpose Indoor Arena To carry out pre-decision scrutiny of a report to Cabinet on a Multi-Purpose Indoor Arena, prior to its consideration by the Cabinet.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development • Finance & Legal representatives • Independent Due Diligence Consultants - representative 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>

Title and Description of Report	Invitees	Contact Officer
<p>Cardiff East Industrial Strategy To carry out pre-decision scrutiny of the draft Cardiff East Industrial Strategy, prior to its consideration by the Cabinet.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Canal Quarter Masterplan To carry out pre-decision scrutiny of the draft Canal Quarter report to Cabinet, prior to its consideration by the Cabinet.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Cabinet Response: Workshops & Innovation Inquiry To receive the response from Cabinet to the recommendations of the Workshops & Innovation Inquiry Committee report.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
Meeting Date: 6 June 2019		
<p>Library Strategy To carry out pre-decision scrutiny of the draft Library Strategy, including consultation responses, prior to its consideration by the Cabinet.</p>	<ul style="list-style-type: none"> • Cabinet Member, Housing & Communities • Assistant Director – Housing & Communities • Lead Library & Strategy Manager 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>New Theatre Operational Model To carry out pre-decision scrutiny of a report to Cabinet on the proposed operating model for the New Theatre, prior to its consideration by the Cabinet.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development • Head of Culture, Venues, Tourism & Events • Finance & Legal representatives 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>ISV Phase II Cardiff Bay regeneration To carry out pre-decision scrutiny of a report to Cabinet on proposals for Phase II of the International Sports Village development and regeneration of Cardiff Bay.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>

Title and Description of Report	Invitees	Contact Officer
<p>City Centre & Bay To review progress in improving linkages between the City Centre and Cardiff Bay.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
Meeting Date: 4 July 2019		
<p>Chapter Arts Centre To carry out pre-decision scrutiny of a report to Cabinet on</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Cardiff Bus Station To review progress in delivering the Cardiff Bus Station, including the input from the Metro Delivery Partnership, the proposed operator model, the interface between the Council, Transport for Wales, Bus and Coach Companies, the impact on the wider Central Square development and nearby developments, financial implications and risks for the Council and how these are being addressed and mitigated.</p>	<ul style="list-style-type: none"> • Leader & Cabinet Member, Investment & Development • Director of Economic Development • Transport for Wales • Bus Companies – Cardiff Bus, Stagecoach, NAT, Edwards, Newport Bus • Coach Companies – National Express • Bus Users Cymru – passenger representatives 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>
<p>Metro Central – Cardiff Central Station To review progress in delivering Metro Central, the impact on the wider Central Square development and nearby developments, financial implications and risks for the Council and how these are being addressed and mitigated.</p>	<ul style="list-style-type: none"> • Cabinet Member, Investment & Development • Director of Economic Development 	<p>Principal Scrutiny Officer Angela Holt AHolt@cardiff.gov.uk</p>

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